

Subcategory Action Extension mApp

History

Date	Version	Created By
2012-02-23	1.0 – Initial Release	Scott Valler

Overview

Extend your Incident Subcategory table's capabilities and have significantly easier administration. Create tickets, jump out to websites, go to dashboards, run one-steps, link to knowledge articles, open calendars, launch reports, bring up searches, and more with your service catalog in the portal, right now! Avoid creating individual one-steps and fill out your service catalog instead.

This Mergeable Application (or mApp) for Cherwell Service Management was created on CSM 9.6.3 and is compatible with future versions.

Minimum Platform: CSM 9.6.3

Installation

Apply the mApp as is allowing the engine to "Make reasonable decisions, but ask me if unsure" then "Open a Blueprint so that I can preview the changes" and click on "Finish".

Once in the Blueprint editor review changes made to the system. There are changes to the Incident Subcategory table fields and several new forms. A new action type lookup table and a new create incident one-step are added. See below for a table of all changes incorporated in the mApp.

Blueprint Changes

Make the following changes within this new blueprint to complete the configuration:

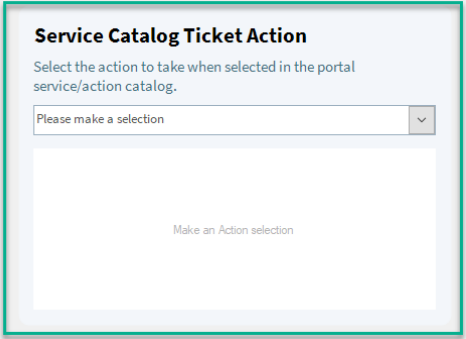
Incident Subcategory

1. Edit the Business Object properties and enable
 - a. Show in One-Steps
 - b. Show in Expression Manager
2. Edit the forms
 - a. Open "IncidentSubCategory Custom Action Form New Content Style" form.


- b. Copy the new “Service Catalog Ticket Action” block to be pasted on the default form.


Instructions

1. Replace the “Service Catalog Action to Run” section with this form. The subform uses an embedded expression. You may wish to enable “Show in Expression Manager”.
2. Update your action catalog(s) to use the custom one-step “Incident SubCategory -> Global -> Perform Selected Action” when creating a new ticket instead of the OOTB one-step “Create Incident and Set Categorization”.
3. Consider adding “Action Type” to the Incident Subcategory Grid.
4. Do the initial “Action Type” population by running this one-step against all Incident Subcategory records: “Incident SubCategory -> Global -> One Time Setup -> Set action type”.
5. Populate your Incident SubCategory records with the desired actions.
6. Enjoy the power and flexibility.



- c. Switch to the default form.

 **Incident SubCategory forms**

 **Standard**


- IncidentSubCategory**
- IncidentSubCategory Create Ticket Subform
- IncidentSubCategory Custom Action Form New Content Style
- IncidentSubCategory Go To KB Article Subform
- IncidentSubCategory Go To URL Subform
- IncidentSubCategory Run Action Subform

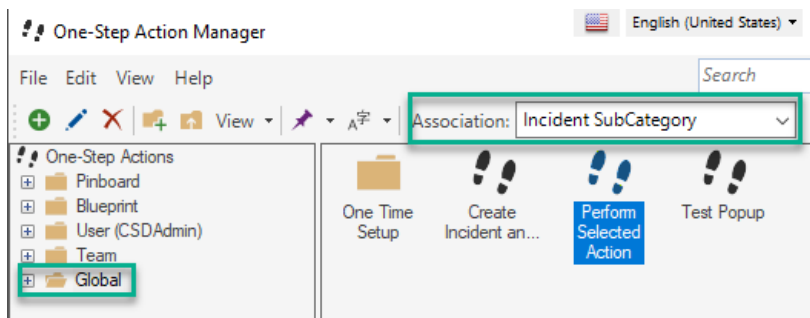
- d. Remove the existing “Action Command Name” controls and rearrange the existing controls to make room for the new control block.

Specifics Name

▼

Action Command Name





Publish Blueprint

Publish the Blueprint.

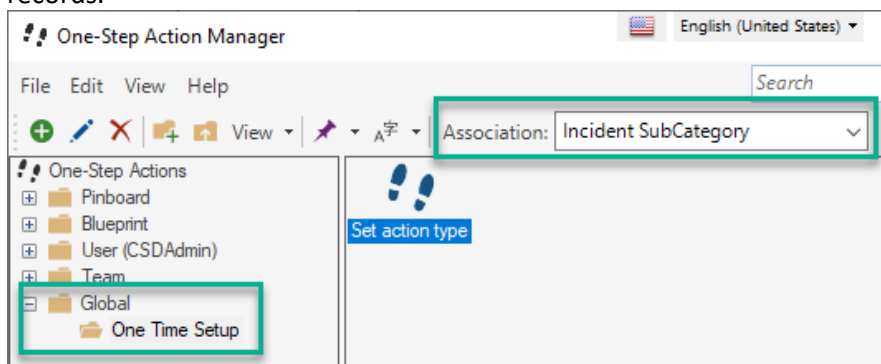
Record/Data Updates

You must update your Incident Subcategory records to have actions assigned. A one-time one-step has been provided that will set standard entries to “Create Ticket” and action entries to “Run Action”.

Subcategory Description	Incident Type	Action Type	Team Default
	Service Request	Go To Website	1st Level Support
	Service Request	Go To Knowledge Article	ITKM - IT
	Service Request	Run Action	Reporting
	Incident	Create Ticket	1st Level Support

Steps to Update Records

1. Open your Cherwell Service Management Rich Client and go to Tools | Table Management.
2. Select the “Incident SubCategory” table.
3. Run the **Incident SubCategory | Global | One Time Setup | Set action type** one-step for ALL records.



4. Make additional manual action mappings as desired.
5. You may wish to add the table data changes to a blueprint to publish to another environment.

Managing

You get four primary ticket actions to carry out in the portal with this mApp. Edit the subcategory entry that you wish to modify the action for and select the appropriate action. Provide any necessary metadata and save. Here are screenshots of the four action types:

Service Catalog Ticket Action

Select the action to take when selected in the portal service/action catalog.

Create Ticket

No Custom Attributes to Configure

Service Catalog Ticket Action

Select the action to take when selected in the portal service/action catalog.

Run Action

Action to Run

Change Calendar

[Go to a dashboard, Run a one-step, Run a report, Run a search, Go to a calendar, Display a visualization, etc.]

Service Catalog Ticket Action

Select the action to take when selected in the portal service/action catalog.

Go To Knowledge Article

10344 - Receiving Error Message: A Connection to the Server Cannot Be Established. HTTP://URL is Now in Offline Mode

Select Knowledge Article

Service Catalog Ticket Action

Select the action to take when selected in the portal service/action catalog.

Go To Website

URL Description

Postman website

URL

https://www.postman.com/

Video Instructions

Please visit our YouTube channel for step-by-step video instructions:

<https://www.youtube.com/channel/UCCRkfQFuT1ZRlrOxvGSIGA>

Changes

Summary of Changes for mApp Subcategory Action Extension Version 1

Business Objects

mApp Item	Item Type	Item Parent	Merge Action	Target Item
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Incident SubCategory	Business Object		Merge	Incident SubCategory
Action Command	Field	Incident SubCategory	Overwrite	Action Command
Action Command Name	Field	Incident SubCategory	Don't change	Action Command Name
Action KB Article ID	Field	Incident SubCategory	Import	New
Action KB Article RecID	Field	Incident SubCategory	Import	New
Action KB Article Title	Field	Incident SubCategory	Import	New
Action Type	Field	Incident SubCategory	Import	New
Action URL	Field	Incident SubCategory	Import	New
Action URL Description	Field	Incident SubCategory	Import	New
IncidentSubCategory Create Ticket Subform	Form	Incident SubCategory	Import	New
IncidentSubCategory Custom Action Form New Content Style	Form	Incident SubCategory	Import	New
IncidentSubCategory Go To KB Article Subform	Form	Incident SubCategory	Import	New

IncidentSubCategory Go To URL Subform	Form	Incident SubCategory	Import	New
IncidentSubCategory Run Action Subform	Form	Incident SubCategory	Import	New
Incident Subcategory Action Type	Business Object		Import	New
Action Type	Field	Incident Subcategory Action Type	Import	New
Created By	Field	Incident Subcategory Action Type	Import	New
Created By ID	Field	Incident Subcategory Action Type	Import	New
Created Culture	Field	Incident Subcategory Action Type	Import	New
Created Date Time	Field	Incident Subcategory Action Type	Import	New
Last Modified By	Field	Incident Subcategory Action Type	Import	New
Last Modified By ID	Field	Incident Subcategory Action Type	Import	New
Last Modified Date Time	Field	Incident Subcategory Action Type	Import	New
RecID	Field	Incident Subcategory Action Type	Import	New

Sort Order	Field	Incident Subcategory Action Type	Import	New
IncidentSubcategoryActionType	Form	Incident Subcategory Action Type	Import	New
IncidentSubcategoryActionType	Grid	Incident Subcategory Action Type	Import	New
PK_IncidentSubcategoryActionType	Index	Incident Subcategory Action Type	Import	New

Image definitions

mApp Item	Item Type	Item Parent	Merge Action	Target Item
chart_24_blue_form	Image definition		Don't change	chart_24_blue_form
excalibur_logo	Image definition		Import	New
Topo 1 light blue 400x160	Image definition		Import	New

One-Steps

mApp Item	Item Type	Item Parent	Merge Action	Target Item
Perform Selected Action	One-Step		Import	New
Select Knowledge Article	One-Step		Import	New
Set action type	One-Step		Import	New

Stored expressions

mApp Item	Item Type	Item Parent	Merge Action	Target Item
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Action Subform Selection	Stored expression		Import	New
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Stored values

mApp Item	Item Type	Item Parent	Merge Action	Target Item
Clear	Stored value		Import	New

Themes

mApp Item	Item Type	Item Parent	Merge Action	Target Item
Prussian Blue	Theme		Don't change	Prussian Blue

Contact

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