Cherwell Service Management

Remote Employee Management mApp Solution

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Legal Notices

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Remote Employee Management mApp Solution V1.0

Cherwell now offers a free Remote Employee Management mApp® Solution that efficiently manages the transition of employees from the office to remote work. You can provide your employees a simple way to initiate the automated workflow that gives them the information and technology they need to remain productive. Simple equipment request and tracking functionality along with status and announcement broadcasting keep your workforce informed and effective.

Visit the Cherwell Marketplace to download this free mApp Solution today.

Platform Version Requirements: Tested on CSM 9.7.0, 9.7.1, and 10.0.0

Content Version Requirements: Tested on CSM 9.7.0, 9.7.1, and 10.0.0. The Remote Employee Management mApp Solution may or may not work with previous content versions, but as with any mApp Solution, you should test it on your customized environment.

This is a Cherwell Labs mApp Solution intended to showcase experimental or beta-level content features in Cherwell Service Management. Functionality, testing, and documentation are limited or incomplete. Cherwell support is not provided for this mApp Solution, so install it at your own risk on a test environment before installing it on a production system.

How the mApp Solution Works

CSM provides Remote Employee Management as a mergeable application (mApp) so that you can effectively manage the transition of employees from the office to remote work. Use the Apply mApp Wizard to apply the mApp Solution to your development CSM system, where the solution can then be viewed and published. After evaluating and testing the solution against the development system, apply it to your production environment.

The Remote Employee Management mApp Solution includes the following items:

Item Category	Item	Typical Merge Action
Major Business Objects	Customer Customer – Internal Incident	Do not change Merge Do not change
Supporting Business Objects	Specifics Specifics – Remote Work Request Specifics – Remote Work Request (Portal)	Import
Lookup Tables	Accessory Request Device Request Incident SubCategory Pickup Ship	Import
Automation Processes	Remote Work Request Support Links Remote Work Request Tasks	Import
Searches	All Customer WFH	Import

	All Remote Work Requests Open Remote Work Requests	

- Import: Add new item.
- Overwrite: Replace target item.
- Merge: Merge differences.
- Don't Change: Referenced by the mApp Solution, but not altered in any way. The mApp Solution includes the definition for informational purposes only (the definition is not imported into the target system).

For detailed information on merge actions, refer to the Apply a mApp documentation:

Apply a mApp Solution (CSM 9.7)

Apply a mApp Solution (CSM 10.0)

Steps to Apply the mApp Solution

To apply the mApp Solution, perform the following high-level steps:

1. Download the Cherwell mApp Solution file.
2. Apply the mApp using the Apply mApp Wizard in CSM Administrator.
3. When publishing the mApp Blueprint, be sure to select option 11 (**Update validation foreign keys**) in the **Publish Options** window.

Apply Remote Employee Management

To apply the Remote Employee Management mApp Solution file, perform the following steps:

Download the .zip file, which includes the following:

- Remote Employee Management.mApp file
- RemoteEmployeeManagementmAppDocumentation.pdf

To apply the mApp Solution, perform the following high-level steps:

1. Download the Remote Employee Management.zip file.
2. Extract the contents of the .zip file to a location that is accessible to CSM.
3. Apply the mApp using the Apply mApp Wizard in CSM Administrator.
4. On the **How automatic should the merge process be?** window of the Apply mApp Wizard, select either **Ask me about every decision** or **Make reasonable decisions, but ask me if unsure**.
5. Save and publish the mApp file.

Configure Remote Employee Management

Use CSM Administrator and CSM Desktop/Browser Client to configure Remote Employee Management. Configuration tasks include:

- Configure Portal Site
- Configure Security Groups
- Configure Customer – Internal

Configure Portal Site

If you prefer that employees access the Request Remote Work Service Request without having to navigate the Service Catalog in the Portal, you can configure your Portal site to include a link directly from the navigation bar.

Follow these steps:

1. Open CSM Administrator.
2. Select the **Browser and Mobile** category.
3. Select **Site Manager** from the task list.
4. Locate your Portal site, right-click the site name, and select **Edit**.
5. Select **Menu** from the **Properties** window.
6. Select **Add action > One-Step action**.
7. In the **One-Step Action Manager** window, set the Association to **Unassigned**.
8. Select the **Global** folder (if not already selected), and then select the **Create Remote Work Request** One-Step. Select **OK** to close the window.
9. The One-Step should appear in the **Action** field of the **Menu properties** window.
10. Enter the text to display (example: Remote Work Request).
11. Enter the help text to display (example: Request to transition to remote work).
12. **Optional**: Provide details in the **Security Options** section.
13. Save your site configuration and exit the Site Editor.

Configure Security Groups

For employees to initiate a Remote Work Request from the Portal, set up security permissions for your Portal security groups.

Follow these steps:

1. Open CSM Administrator.
2. Select **Security** from the **Categories** list.
3. Select **Edit security groups** from the task list.
4. Select your Portal Customer security group from the **Group** drop-down list.
5. Select the **Business Objects** tab.
6. Select **Specifics – Remote Work Request** from the **Business Object** drop-down list.
7. Under **General**, select **View, Add,** and **Edit**.
8. Select **New Field** from the object field list.
9. Under **General**, select **View** and **Edit**.

10. (optional) Repeat steps 4-9 for additional Portal Security Groups.

Configure Customer – Internal

As part of the Service Request workflow for a Remote Work Request, the technician will send out a notification to employees when their equipment has been shipped or delivered to their local office for pickup. This notification also triggers an update to the Customer – Internal record to mark their status as a remote employee and include a shipping address if one was provided.

To view the Employee's remote work information from the Customer – Internal record, follow these steps:

1. Open CSM Administrator.
2. Select **Create a new Blueprint** from the **Common Tasks** list.
3. Select the **Customer – Internal** object from the **Major object** list.
4. Select **Edit form arrangement** from the **Appearance** options.
5. In the Object tree, under **Additional forms**, drag the **Remote Work Information** form on to the form arrangement in the desired location.
6. **Optional**: Edit tab properties to include a visibility expression or change the name of the tab.
7. **Save** your changes.
8. Select **Publish Blueprint** from the **Blueprints** list.

Use Remote Employee Management

The following sections describe the ways you can use Remote Employee Management.

- Announcements
- Requests for Remote Work
- Remote Work Tasks
- Updating the Customer – Internal Records

Announcements

Use Announcements to post updates to your customer Portal. The Remote Employee Management mApp Solution assumes that your organization will continue to utilize whichever method you already have in place to distribute company-wide communications that are related to emergency response and/or policy updates. You can use the Announcement object to post complimentary notifications on your Portal.

Example Announcements include:

- Ability to work from home is now available
- Remote work is now mandatory due to an emergency
- How to submit a Remote Work Request
- Provide information on updates to FAQs/Policies
- Emergency has ended, and employees can return to the office
- Reminders to ensure employees return all borrowed assets when returning to the office

For more information, see Create A New Announcement Topic.

Remote Work Requests

Work requests can be submitted by employees through the Portal or by technicians through the Desktop Client/Browser Client.

From the Portal, employees follow these steps:

1. Log in on the Portal home page.
2. Select **Remote Work Request** from the main navigation.
3. Provide the following information on the **Remote Work** form:
    a. Do they need to request a device? (example: I have a desktop computer at work and need to request a laptop to work from home)
    b. Do they need accessories for their device? (example: monitor, docking station, keyboard, mouse, etc.)
    c. How do they want to obtain the equipment? (example: shipped to home, or in-office pickup)
    d. Is there any additional information they'd like to provide?
4. After the form is completed, select **Add to Cart**.
5. In the **Cart** view, submit the request.

After submitting the request, employees can view their request status from the **My Items** page.

For more information, see Portal.

From the Desktop/Browser Client, technicians follow these steps:

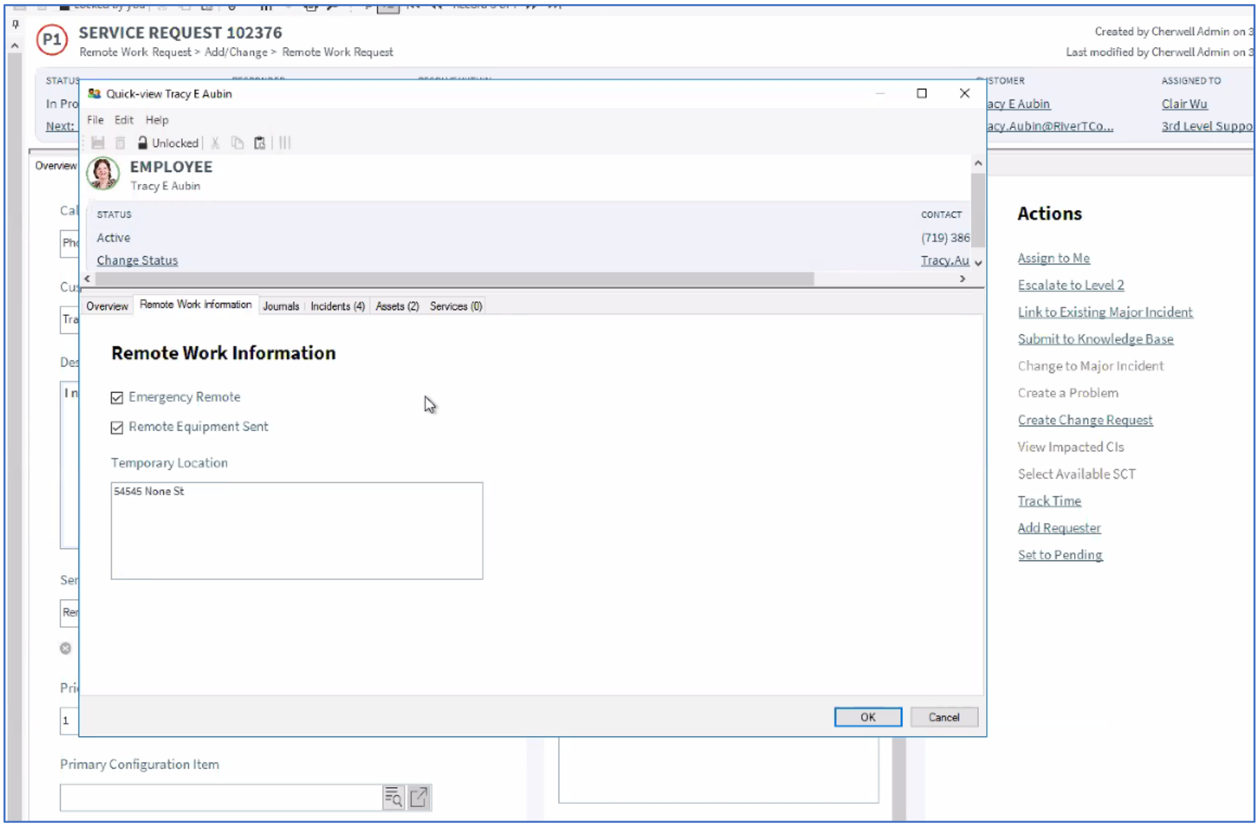
1. Select **New > New Incident**.
2. When the new Incident record opens, fill out the following fields:
    a. **Customer**
    b. **Description**
    c. **Service Classification: Remote Work Request > Add/Change > Remote Work Request**
    d. **Priority > P1**
    e. **Assigned Team** and **Assigned To** (optionally, select **Assign to Me** from the **Actions** list)
3. **Save** the record.
4. In the Specifics form, fill out the following information:
    a. **Device Request**
    b. **Accessory Request**
    c. If needed, select the appropriate accessories needed
    d. **Pickup Options (Note:** If **Ship to Home** is selected, provide the shipping address).
    e. (optional) **Additional Information**
5. **Save** the record.
6. Select **Next: Begin Work** from the default form to advance the Status to 'In Progress'.
    - This step triggers new tasks for the technician to fulfill the Service Request.
    - The tasks that are generated differ slightly depending on the combination of responses to the Specifics questions.
7. Select the **Tasks** tab.
8. Complete the following tasks based on the outlined scenarios:
    a. Create Order / Prepare Computer (device requested)
    b. Create Order / Prepare Accessories (accessories requested)
    c. Review additional items in the **Additional Information** field (additional information provided)
    d. Ship Computer and Equipment to Employee (Ship to Home)
    e. Ship Computer and Equipment to Work Site (Local Office)
    f. Update CIs with Primary User Name (new equipment requested)
    g. Confirm Employee Receipt of Shipment

Note: In the **Ship Computer and Equipment to Employee** task, the technician is directed back to the **Overview** tab to perform the **Send Shipping/Pickup Information** action on the Specifics form. Performing this action also updates the Customer – Internal record that is associated with the Service Request.

If you want to verify the information was updated on the Customer – Internal record, within Incident, on the Overview tab go to the **Customer** field Related Item Picker, select the **Quick View** button.

A new **Remote Work Information** tab is added to Customer – Internal form arrangement with the following fields:

- **Emergency Remote**
- **Remote Equipment Sent**
- **Temporary Location** (if provided)



Once all Tasks have been completed, the technician can close the Service Request by following these steps:

1. Select **Next: Resolve**.
2. Enter a description in the prompt window.

The Service Request is moved to **Resolved** status.

Import Data

If you have already started tracking employees who are transitioning to a remote work environment prior to implementing the Remote Employee Management mApp Solution, you can import that information into CSM.

For more information, see Run a One-time Import of Business Object Data.

1. Open the **RemoteEmployee_ImportTempalte.csv** file that was included in your .zip download.
2. Enter the data you've already collected into the template in the appropriate columns. **Important**: Ensure all data is formatted as an exact match with values that already exist in CSM so that you don't receive import errors for mismatched values.
3. Log in to CSM Administrator.
4. Select the **Database** category.
5. Select **Run a one-off data import (CSV files)** from the task list.
6. In the Import Data Wizard, provide the following information:
   a. On the **File to Import and Primary Business Object** window, select your .csv file and select **Incident** from the **Primary business object** drop-down list.
   b. On the **Map Import File Columns to Fields** section, set the following field maps:
      - AccessoryRequest > Specifics.Accessory Request
      - AdditionalInfo > Specifics.Additional Info
      - AssignedTeam > Incident.Assigned Team
      - AssignedTo > Incident.Assigned To
      - CallSource > Incident.Call Source
      - Category > Incident.Category
      - Customer > Incident.Customer Display name
      - Description > Incident.Description
      - DeviceRequest > Specifics.Device Request
      - DockingStation > Specifics.Docking Station
      - Headset > Specifics.Headset
      - Keyboard > Specifics.Keyboard
      - Monitor > Specifics.Monitor
      - Mouse > Specifics.Mouse
      - PickupOptions > Specifics.Pickup Options
      - Priority > Incident.Priority
      - Service > Incident.Service
      - ShippingAddress > Specifics.Shipping Address
      - Status > Incident.Status
      - Subcategory > Incident.Subcategory
   c. Complete the remaining Import Data Wizard windows until you get to the **Summary** window. Select **Test Import** to confirm that your .csv file will import correctly.
   d. Select **Import**.

Note: Records that are imported with **In Progress** status are included in the next run of the **Remote Work Request Tasks** automation process so that the appropriate tasks are generated for the record. If you do not have an **Assigned Team** and/or **Assigned To** information at the time of import, when the tasks are generated, they will also have a blank **Assigned Team** and/or **Assigned To** field.