Kanban for Cherwell
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Agenda

- About StrataCom
- Some Kanban terminology and features
- Kanban Demo
About StrataCom

- Founded in 1997, Solely focused on ITSM
- Cherwell partner for 8+ years
- 16 certified Cherwell consultants
- **Host the Cherwell Advanced Practitioner Call**
  - lwalker@stratacominc.com
- **Provide complementary strategic products:**
  - **Mobile Client for Cherwell**
    - [https://www.cherwellmobile.com/publicdemo](https://www.cherwellmobile.com/publicdemo)
  - **Kanban Boards for Cherwell**
  - **Lower Environment Sync Utility (Looking for Beta Partners)**
  - **Active Directory Users, Teams and Workgroups integration pack**
  - **mApps**
    - Customer approvals,
    - RED (Requirements, Enhancements, Defects)
Other Presentations

- Cherwell Upgrades, Content upgrades and ‘Refreshes’
- REST API integrations deep dive
- Service Catalog, how do I build this thing anyway?
Kanban Terminology and Features

- **Kanban** -- Visually depict work at various stages of a process using cards to represent work items and columns to represent each stage of the process.
- **Board**—A list of records from a Cherwell Stored Query displayed in a visual fashion that can be moved around on the board. Each time a record is moved, it is updated in Cherwell.
- **Cards**—Each board displays Cherwell records as ‘cards’ on the board.
- **Drop Actions**—An action that is performed on the card that is dropped on the column.
- **Swimlane**—Vertical columns that live underneath the horizontally displayed columns that help separate data on the board.
- **Web Sockets and SignalR**—The technology we are using to perform live updates to the cards on the boards.
Our Goals While Building our Mobile/Kanban

- The Products must be completely configurable
  - We must be able to set up any customer’s specific needs, without changing our core code-base
  - Customer boards or mobile environments must be able to be changed in minutes
- Must be extremely easy to use for users
- Real-time updates. When users update a record in our Mobile solution, Kanban or in Cherwell, our solutions must update instantly without interrupting the users
  - We use Microsoft’s web socket implementation, SignalR to pull this off
  - Including an API call from Cherwell to our solutions to auto-update the records
  - I will demo this with our Kanban boards
- We must solve any issues with Cherwell so that we don’t need to add a single thing to a customer’s Cherwell instance for our solutions to work
  - No Database views fronted by Cherwell Objects
  - No mApps
  - Workarounds for Cherwell API bugs
- Our solutions must be fast. Really, really, really fast.
  - Round-trip updates from Kanban or mobile to Cherwell should take 200 milliseconds or less
  - Our ‘Seamless Offline’ mode we developed for mobile pre-emptively caches every single record and list picker a user will use in the background, then uses SignalR to update the cached tickets live
  - Switching from ticket to another should take less than 10 milliseconds
  - 1 million + customers in one system and searches are extremely fast
Challenges

- Cherwell’s REST API is missing some basic functionality
  - There is no way to view Cherwell Team members
  - There is no way to get this information without making substantial changes to Cherwell
- You cannot run one-steps via REST API Calls until 9.7
  - Running one-steps is possible using SOAP calls
  - If customers are running SAML, its (almost) impossible to run one-steps via SOAP calls
- There are many tables for Cherwell that are not available via REST calls
- Stored queries only return the columns include in the Default Grid for that object, so those fields are not available to show from the query results
- There are several bugs with Cherwell’s REST API, depending on the version you have.
  - Some users just cannot use the API and their account must be deleted/re-added
  - Certain queries that pull back user’s tickets
- Cherwell’s API is not developer friendly. It is not what I would call an easily to learn API, but it’s perfect for building external applications on!
Let’s see Kanban in action!