

Installation Guide: ComAround Knowledge™ mApp 3.0

Overview

The ComAround Knowledge™ Integration mApp 3.0 provides a seamless integration between Cherwell and ComAround Knowledge™ through built in interfaces which makes knowledge available via the interaction points you already have within your support operations. This is a KCS v6 Verified mApp. The knowledge is available in the right place and at the right time. Both the service desk and end users can resolve issues with the pre-populated ComAround Knowledge™ solution, via CSM.

Integrating ComAround Knowledge™, within Cherwell Service Management® ensures that end users have a much higher probability of resolving incidents themselves. The customers get the service they need, and self-service adds value to the business by driving down the cost of IT support.

Cherwell SERVICE MANAGEMENT

Home Service Catalog My Devices IT Calendar Charts and Items Service Orders

ComAround Knowledge

Search Knowledge

Search Phrase: printer issue

- Fix printer issue in Buenos Aires Office building
- Troubleshooting printer issue from Sacramento, CA office building B
- vpn issue
- vpn issue
- Scan your registry for issues
- Adding and connecting network printers
- Printer error dep 5
- wifi issue in barcelona
- unable to print from printer in Memphis, Tennessee office
- Printing a web page

Viewing page: 1 of 3

News

- Cherwell - the Only Challenger in Gartner Magic Quadrant
- Cherwell IT Service Management - Get IT Out of the Basement

Recommended

- Troubleshooting printer issue from Sacramento, CA office building B
- Starting a conference call
- Add new article to ComAround from Cherwell CSM (mApp 2.0)
- Search ComAround from incident in Cherwell CSM (mApp 2.0)
- Customer searches ComAround articles in Cherwell portal (mApp 2.0)

About this mApp

The ComAround Knowledge™ Integration mApp 3.0 has been developed on CSM version 9.3.0 using the ComAround REST API (v2) Webservice. The mApp consists of several functions and objects to integrate Cherwell Service Management with ComAround Knowledge™. The integration supports CSM version 9.3 and later versions.

This documentation is intended to clarify and simplify the steps needed for successful appliance of the mApp in your own CSM instance and configuring it the intended way.

*If you are running a version of CSM earlier than 9.3, contact ComAround and we can assist you in finding a solution.

Intended audience

This mApp is easily installed and configured by your Cherwell Administration team. This mApp provides all the objects, one steps, expressions, and dashboards that are needed to perform a basic integration.

New features

The 3.0 version of the mApp is all new with feature enhancements based on the feedback from customers. A few of these improvements are listed below.

Codeless and simplified configuration – Using the new ComAround Settings, you have full control of the integration settings in one place. Also, most of the setup is pre-built so it requires minimal effort from customers to get it up and running. Benefit: Quick and effortless to setup.

Generic or personalized authentication – You are now able to use your personal ComAround account and connect it to your Cherwell profile. Enabling individual reporting, metrics, and so on. Benefit: Better overview and easier to keep track and manage reporting.

API v2 – the new mApp uses ComAround’s new API with more features and capabilities. Benefit: Enhanced capabilities allowing customers to extend the mApp integration if they want to.

Flexible ComAround Search – Allow customers to show the ComAround search results either in the incident view or in a tab below the incident for agents. You can now use the results in an embedded control which allows a more consistent user experience when used in multiple places. Search suggestions are shown, when misspellings are detected, and are clickable to adjust the search query. Benefit: No matter how your incident forms look, there is a ready-made solution you can use.

ComAround History – Automatically tracks all ComAround interactions from both the agent and portal. Enabling you to pull reports and information on the usage in Cherwell. Benefit: Easier work for coaches and managers to stay on top of the performance and usage.

Link Incidents to ComAround articles – When using articles to resolve incidents we utilize the “Link Indicator” feature in ComAround to show which incidents were resolved by specific ComAround articles. These can be found in ComAround Knowledge™. Benefit: Helps coaches and managers easier identify high value articles and make sure the organization spends time and resources on the right tasks.

Enhanced Cherwell portal functionality – You are now able to place Recommended and News articles lists in the Cherwell portal for users. Benefit: Improved user experience and satisfaction.

Knowledge State visibility – You can choose which articles, based on knowledge states, should show up in Cherwell for the agents when referencing ComAround. Benefit: Greater control and better workflow for the agents using Cherwell, resulting in more correct and consistent responses.

Share articles via built-in email feature in Cherwell Incidents – Agents now have the capability to share an article from ComAround with customers by clicking a button from a Cherwell incident. Benefit: Faster and more efficient agent workflow, resulting in faster response times to customers.

Steps to Implement the ComAround Knowledge Integration 3.0 mApp

This is a step by step instruction on how to successfully implement the ComAround Knowledge Integration in your Cherwell Service Management Platform instance. This assumes that your system is close to the out of the box experience.

1. **Download the ComAround Knowledge mApp 3.0 from the Cherwell mApp Exchange.**
2. **Obtain ComAround Knowledge credentials.**

To set up the integration to work with your Organization's ComAround Portal, you need to provide your specific credentials for this portal.

 - a. You need to create a free account at <https://connect.comaround.com/>, and subscribe to the Basic Product. Once approved you will get the ComAround Subscription Keys needed for the setup.
 - b. You will also need a username and a password for access to your specific ComAround Knowledge™ portal. One set of credentials with knowledge worker access, and another set of credentials with reader access. This can be obtained from your internal ComAround Admin.
 - c. If you have issues obtaining these credentials, please contact ComAround Support and request those credentials.
3. **Back up your system if you prefer.** According to Cherwell Best Practice, it is recommended that organizations perform a system backup, and appropriately test new mApps in a development/test environment before using them in a production environment (optional).
4. **Apply the mApp by following the mApp Wizard and have it create a blueprint** (if it prompts you about name conflicts, click next to continue).
5. **In the blueprint, add the controls to the incident forms in default and portal views from the ComAroundControls form on the Incident Object.** Use copy paste from ComAroundControls into your Incident form for example. Position the "Search" button and "Create ComAround Article from ticket" link as appropriate. Remove the "Submit to knowledge base" link if desired.
6. **Add the search results display to the incident forms in the default and portal views from the ComAroundResults form on the Incident Object.**

We recommend you add this as an embedded form control rather than copying the individual pieces to the main forms. To do this, in the left column titled Controls click Special, and then Embedded Form. Use the Expression radio button and type in the exact name (ComAroundResults). Make sure to uncheck the read-only check box. If you do not have much space on the incident form to position the search results, you can place the ComAroundResults in the tab section if that makes more sense.
7. **Update the portal dashboards.** You should update your portal to use the new ComAround dashboard, found under Global->ComAround Knowledge Integration v3->ComAround Knowledge. On this dashboard you will find both the Search and Search Results for the portal side, as well as the News and Recommended lists from your ComAround instance. There are widgets here that you can edit if you want to view more detail about associated One-steps and how they work.
8. **Publish the blueprint.**
9. **Grant security rights to portal users on ComAround History,** as they need the ability to add and view records. Open the Admin client of Cherwell again. Go to Security. Click Edit Security groups. Update your portal user security groups. As an example, click in the drop down next to Group and choose Portal Customer. Go to Business Objects. In the Business Object drop down, choose

ComAround History. Check the boxes under General titled View and Add. Click on New Field in the left list. Check the View and edit boxes. Depending on your setup, you may want to do the same for several groups (any portal groups that need to use ComAround).

10. **Log into the Cherwell client.**

11. **Create a ComAround Settings record.** Log in as an admin in the blue client. Go to Tools>Table Management. Where it says Type, choose "ComAround Setting". Create a new record. Fill in both the ComAround API keys (Primary and Secondary). For the Technician side, choose the login method. You may either choose individual logins per agent (which they will only need to fill in once), or choose one generic account for all to use. Fill in an admin username and password for ComAround Knowledge™. If you are using a generic account, this will be used for all searching and article usage. If you are using a "per user login", the credentials are used for the News and Recommended widgets. You can choose to enable sharing Published ComAround article links via email. You can choose to display the search results in a tab. Choose the number of search results to display. Choose which article knowledge states to display as well. For the Customer portal side, fill in an end user username and password for ComAround Knowledge™. For paging through search results, set the navigation orientation as either left/right or up/down.

ComAround Settings **Status: Inactive**
[Make Active](#) [Reset Login Tokens](#)

Step 1: API/Client Keys

Primary API Key/Client Key *:

Secondary API Key/Client Key *:

Step 2: Technician/User Client Details

Login Method *:

Allow Sharing Published Articles
 User Display Results Tab

System Account *:

System Password *:

Number of Results *:

Navigation Orientation *:

Article Types To Display

<input checked="" type="checkbox"/> Draft?	<input checked="" type="checkbox"/> Published?
<input checked="" type="checkbox"/> Work In Progress?	<input type="checkbox"/> Archived?
<input checked="" type="checkbox"/> Approved?	

Step 3: Customer Portal Details

Account *:

Password *:

Number of Results *:

Navigation Orientation *:

Once complete, remember to save and then activate it at the top of the settings.

12. **Close the Cherwell client, very important!!**

13. **Create two scheduled jobs** to enable updates to the ComAround lists for News and Recommended articles. Go to Scheduling>Edit Schedule. Click Add. Under General, type in a Name (ex. ComAround News). Under Schedule, click the Recurring radio button, choose what time you want this to update (we recommend once per day). Click the No end date radio button. Under Action, choose One-Step in the drop down. Locate the pre-configured One-Step as described below:
- a. Update the ComAround News articles nightly, call one-step (None)->Global->ComAround Knowledge Integration v3->CKI Load News.
 - b. Update the ComAround Recommended articles nightly, call one-step (None)->Global->ComAround Knowledge Integration v3->CKI Load Recommended.
- The last step is to go to Error Handling. Here you check the box called “If scheduled item fails, still schedule next run”. This makes sure the updates do not stop if an error should occur.

This should complete the setup. You are now ready to test the integration. From here you can customize it to better suit your needs and environment.

Tips and recommendations

- We recommend you use both the primary and secondary ComAround API Subscription keys in the ComAround Settings. The primary key from the rich/browser clients, and the secondary key from the portal. Although, you could put the same key in both.
- In the ComAround Settings, clients can choose to either use a single login account to do all searches, link articles and create articles, or use a different login Per User for tech users. This will impact the metrics logged in ComAround’s Business Intelligence reporting.