

HappySignals Employee Experience

Implementation Guide for Cherwell

Version 1.0

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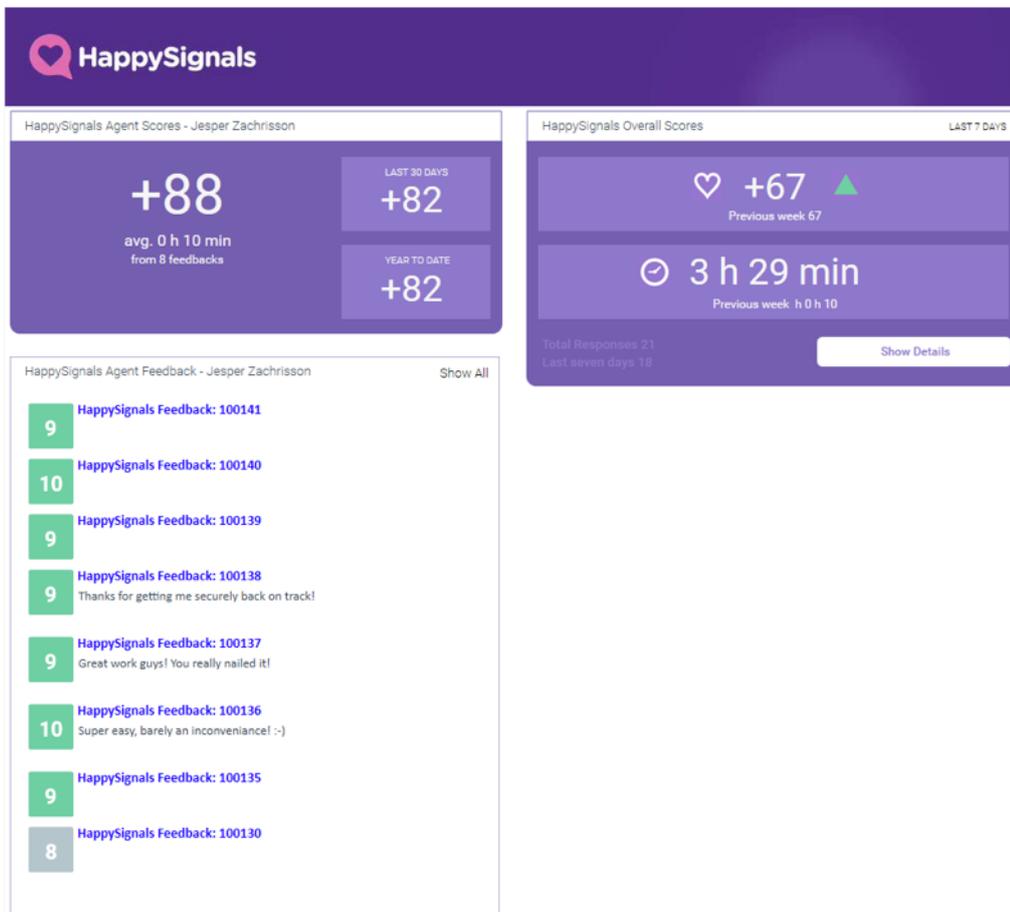
1 Overview

HappySignals fully integrates to Cherwell with a 2-way API Integration. Survey workflow starts at Cherwell utilizing the resolve email notification. Survey answers are pulled back to Cherwell and inserted in data tables in HappySignals Feedback BusinessObject for further reporting and analysis. The Integration includes Dashboards for Agents / Managers & Admins including Integration settings and real-time follow-up on Agent specific and Overall Score statistics.

HappySignals Integration Application for Cherwell is totally isolated from Cherwell workflows and only refers to data in the platform, i.e. user, customer and ticket related data.

2 Requirements and other information

- 9.4.0a or above
- Admin Access to CSM platform for implementing mApp application
- HappySignals Cloud Service



3 Implementation Guide

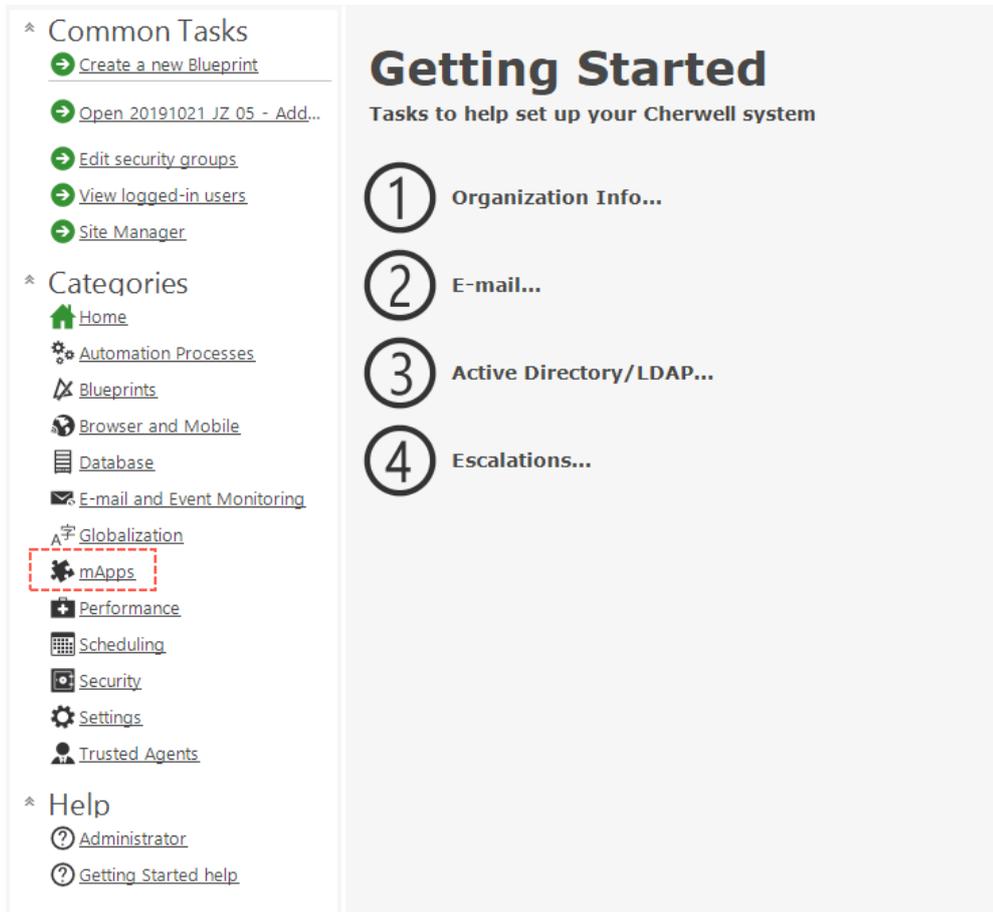
This section describes how to implement HappySignals Employee Experience into your Cherwell.

3.1 Downloading Integration Solution from Cherwell mApp Exchange

In your browser of choice, go to the [Cherwell mApp Exchange](#). Under Publisher, select HappySignals and download the solution.

3.2 Installing mApp Application

1. In the Cherwell Administrator Client, go to 'mApps'.



The screenshot shows the Cherwell Administrator Client interface. On the left, there is a navigation sidebar with sections: 'Common Tasks' (containing links like 'Create a new Blueprint', 'Open 20191021 JZ 05 - Add...', 'Edit security groups', 'View logged-in users', 'Site Manager'), 'Categories' (containing 'Home', 'Automation Processes', 'Blueprints', 'Browser and Mobile', 'Database', 'E-mail and Event Monitoring', 'Globalization', 'mApps', 'Performance', 'Scheduling', 'Security', 'Settings', 'Trusted Agents'), and 'Help' (containing 'Administrator', 'Getting Started help'). The 'mApps' item in the 'Categories' section is highlighted with a red dashed box. The main content area is titled 'Getting Started' and contains the text 'Tasks to help set up your Cherwell system' followed by a numbered list of four tasks: 1. Organization Info..., 2. E-mail..., 3. Active Directory/LDAP..., and 4. Escalations...

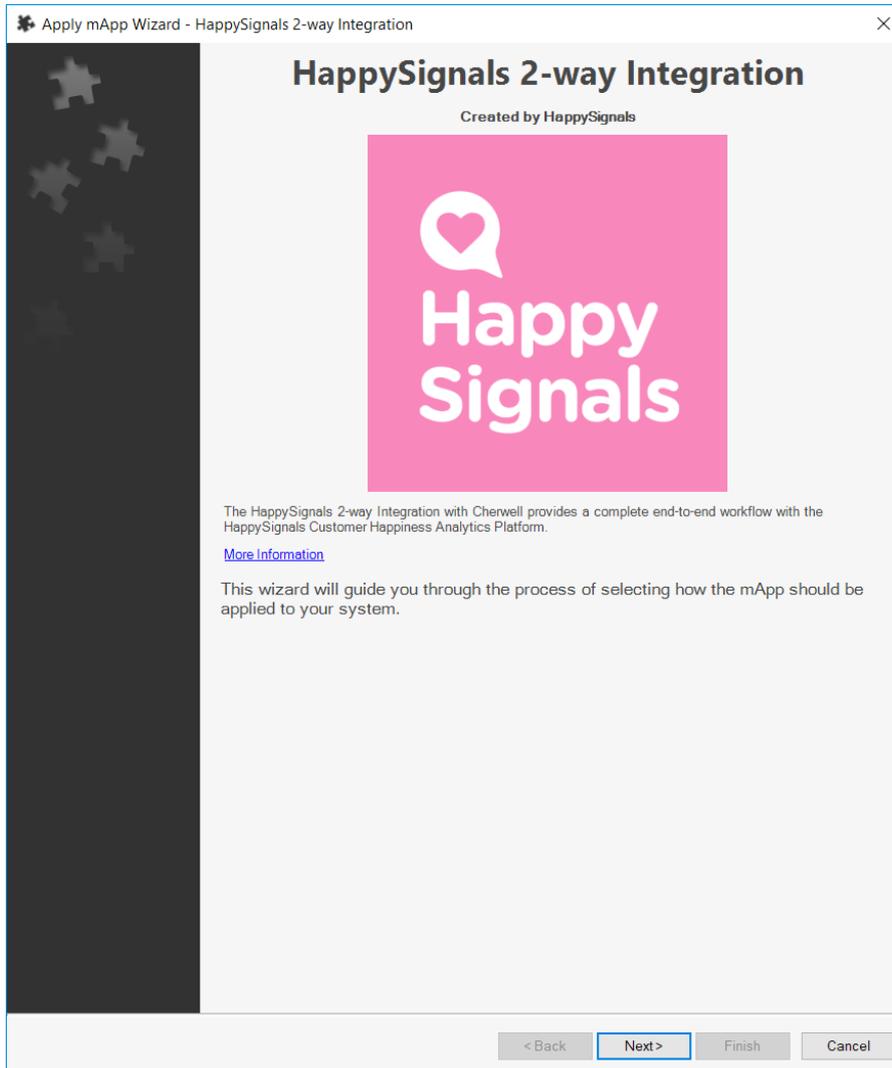
2. In the mApps Task section, select 'Apply a mApp'

 **Apply a mApp**

3. Select the mApp file downloaded from Cherwell mApp Exchange

 HappySignals 2-way Integration.mApp

4. Follow the steps to install the HappySignals Integration mApp



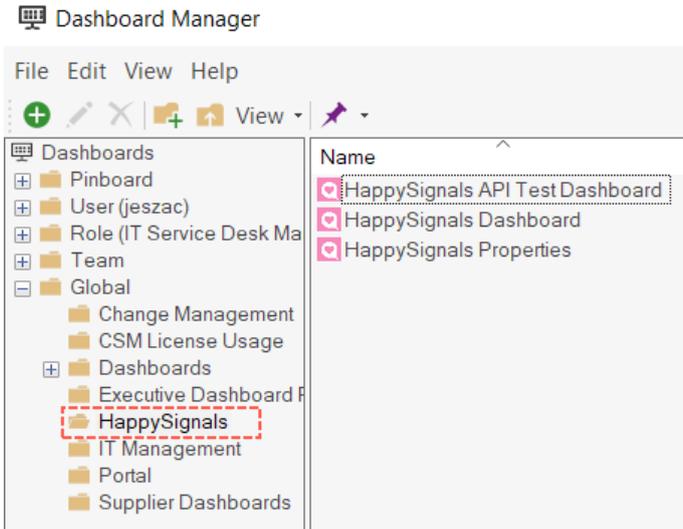
4 Setting up the Application

After successful publish of the HappySignals Integration mApp, the first step is to configure the customer specific HappySignals settings.

4.1 HappySignals Properties Dashboards

In your Cherwell instance, you will now find 3 new dashboards for HappySignals. They are located in the Dashboard Manager under the Global Scope and in the folder 'HappySignals'.

Please open the 'HappySignals Properties' Dashboard.



Integration Properties

Changing these properties will affect HappySignals Applications functionality. Please be sure that you know what you are doing. In case of questions, please contact support@happysignals.com

HappySignals URL ?

https:// <instance> .happysignals.com ↻

API Key ?

↻

Shared Secret ?

↻

Voting button background color ?

↻
rgb: 246:151:202

Show Overall Score to Agents ?



Show Customer and Record Data to Agents ?



HappySignals Admins ?

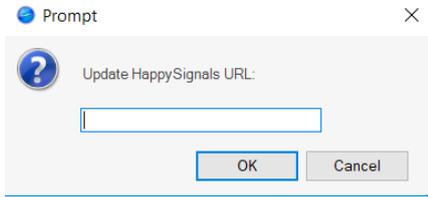
+ **Cherwell Admin**
✖

HappySignals Managers ?

+
✖

Updating Property string values

To update the text-based values in the properties dashboard, use  the icon to launch the property update dialogue.



HappySignals URL

The URL to your HappySignals instance. Provided by HappySignals.

API Key

Customer specific API Token provided by HappySignals

Shared Secret

The word or sentence for proof of origin in the email functionality. Provided by HappySignals for your company.

Voting button background colour

The colour code used on your voting buttons, usually placed in your resolution emails. The default colour is our friendly pink, but it can be changed to any colour matching your corporate design.

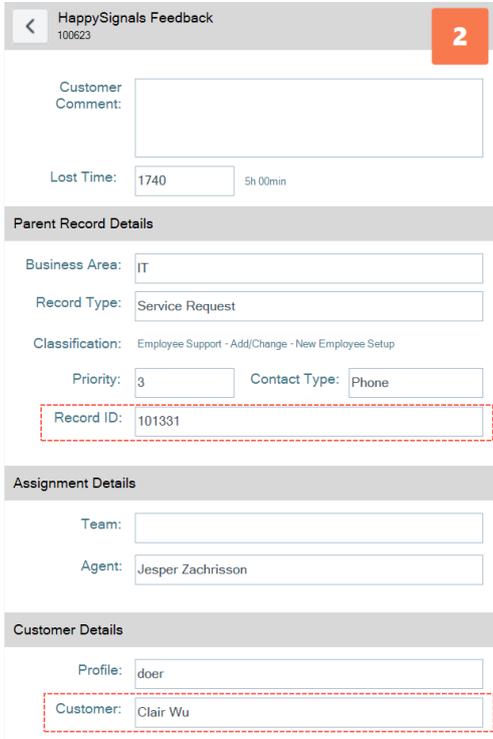


Show Overall Score to Agents

With this setting you may control the visibility of your organization overall happiness score to all agents. Of switched off, this will only be visible for HappySignals Admins and Managers (see specific section)

Show Customer and Record Data to Agents

With this setting you may control the visibility of customer and ticket identifiable data in feedback records to your agents, such as ticket number, customer name.



HappySignals Feedback
100623 2

Customer Comment:

Lost Time: 5h 00min

Parent Record Details

Business Area:

Record Type:

Classification: Employee Support - Add/Change - New Employee Setup

Priority: Contact Type:

Record ID:

Assignment Details

Team:

Agent:

Customer Details

Profile:

Customer:

HappySignals Admins

This is where you manage the list of Admins for your HappySignals integration. Admins are able to edit the properties in the properties dashboard.

HappySignals Managers

This is where you manage the list of Managers for your HappySignals integration. Managers are able to view your organization's overall happiness score even if inactivated for agents.

4.2 Running an API test

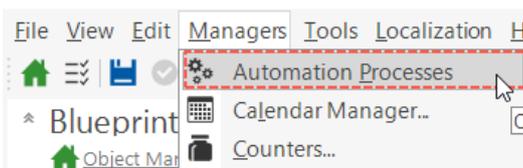


After setting up the properties, you can test the API using the API Test Dashboard. Clicking the 'Get all new Feedback' button will retrieve all new feedbacks from your HappySignals Cloud Service if they are not already in your system (which they won't be the first time). If you don't get any errors, your integration is working. Even if you're not receiving any feedbacks yet. That may be the case if you have no feedbacks in your HappySignals Cloud Service yet.

4.3 Vote buttons in resolution email

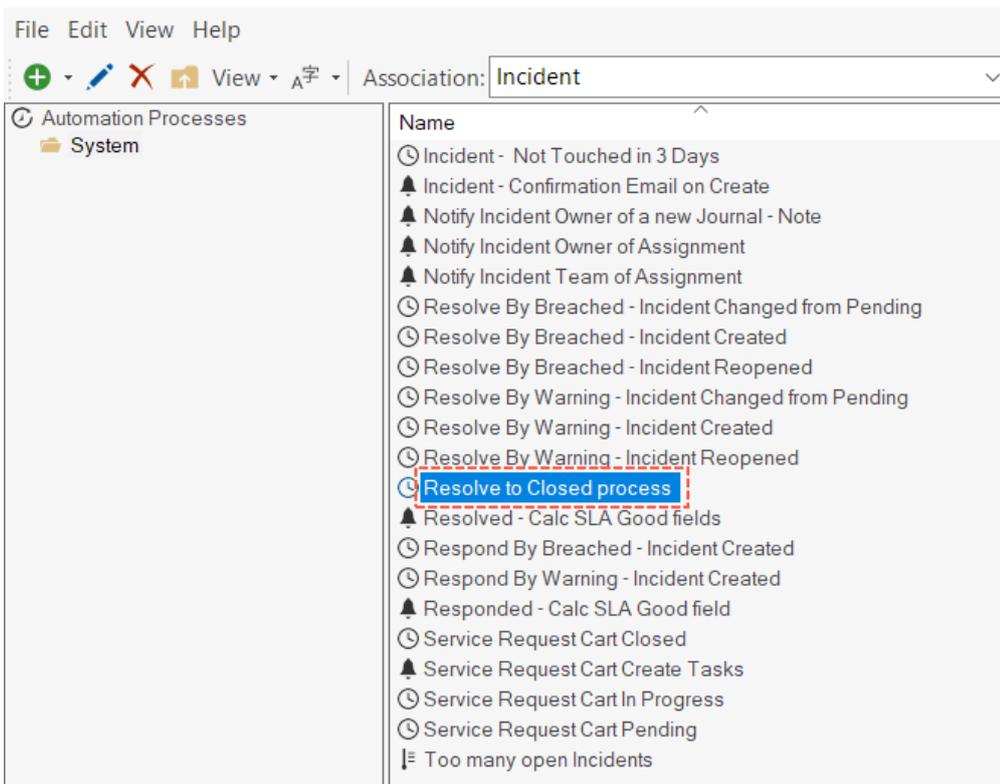
In order for your end-users to supply feedback from Cherwell tickets to HappySignals, your resolution email OneStep needs to be switched to the HappySignals version.

To do this, you'll need to create a new blueprint. Assuming that you know this procedure, we'll jump directly into the specific changes you'll need to do.

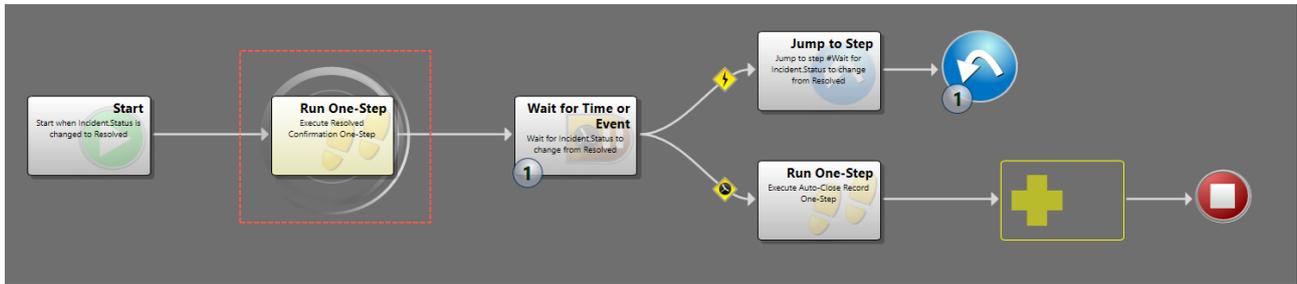


In your new blueprint, please open the Automation Process Manager

In your list of automations for the Incident Business Object, please edit the one called “Resolve to Closed process”.



Highlight the first step after the start called “Run a One-Step”.



Switch the OneStep used by clicking the browse button.

Action - Execute Action
Action to execute

Action to Execute

Nothing

Run One-Step: Resolved Confirmation ...

Execute Action: Action ➤

Add to queue: ...

Jump to step: ▾

End process

Select the OneStep called “Resolved Confirmation - HappySignals” to be used instead of your standard one.

One-Step Actions

- + + Pinboard
- + Blueprint
 - + Buttons and Link Labels
 - + Deprecated
 - + Notification E-mails
 - + Portal
 - + Print Actions
 - + Status Actions
- + + User (jeszac)
- + + Team
- + + Global
- + + Business intelligence

Name

- + Incident Confirmation
- + Notify Owned By of a New Journal-Note
- + Notify Owned By of Edits
- + Notify Owned By Team via E-Mail
- + Notify Owned By via E-Mail
- + Resolved Confirmation
- + Resolved Confirmation - Happy Signals

Tip:

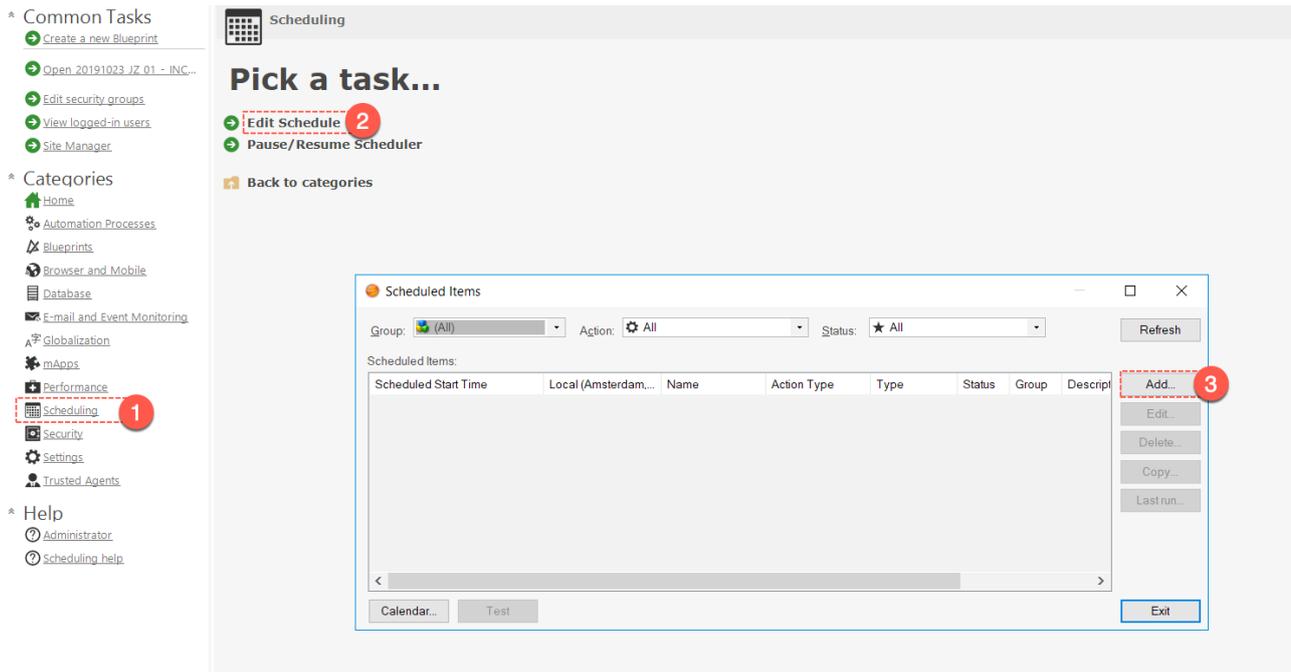
You may have designed your regular "Resolved Confirmation" very differently than the Out-of-box one, used to create the HappySignals version. Feel free to copy your own design of the email onto the HappySignals OneStep version. The important part is only that you include the same "Happy Vote Button HTML" in the same way as has been done in the HappySignals version.

Incident ID Label	
We are pleased to inform you that your <code>Incident ID Label</code> has been resolved. If you believe this is in error, please contact the service desk to <code>Hyperlink to Respond via Email</code> . Otherwise, your incident will be closed automatically in 3 business days.	
Resolution: <code>Incident.Close Description</code>	
HAPPY VOTE BUTTONS! Please accept by rating your service experience, where 0 is poor and 10 is awesome.	
<div style="border: 2px dashed red; padding: 2px; display: inline-block;"><code>Happy Vote Buttons HTML</code></div> 	
Description of the issue you reported: <code>Incident.Description</code>	
Please do not hesitate to contact the Service Desk if you have any questions, or use our Customer Portal to view more details: <code>Hyperlink to Customer Portal</code> .	
Kind regards Service Desk	

After completing your customisation of the OneStep and Automation, please publish your blueprint.

4.4 Scheduled import

For the feedback records to be imported into the Cherwell system automatically, we also need to set up a scheduled job to request those from the HappySignals API. Each run will only fetch the newly created feedback items and will never overwrite a previously imported item from the system.



The screenshot shows the 'Scheduling' interface. On the left, under 'Categories', 'Scheduling' is selected (1). The main area displays 'Pick a task...' with 'Edit Schedule' selected (2). A 'Scheduled Items' dialog box is open, showing a table with columns: Scheduled Start Time, Local (Amsterdam...), Name, Action Type, Type, Status, Group, and Description. The 'Add...' button is highlighted (3).

To create the Scheduled import, please log in to your Cherwell Administrator Client.

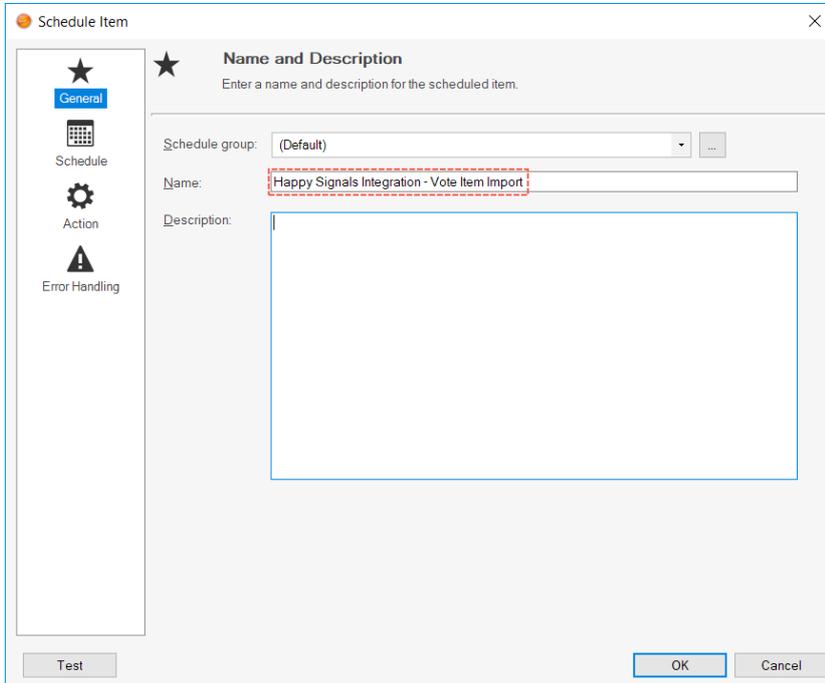
1. Select 'Scheduling' in the Categories list
2. Select 'Edit Schedule'
3. In the Scheduled Items dialogue, select 'Add'

General

Give the schedule job a name. E.g. "HappySignals Integration – Feedback import"

Schedule

Set up the schedule time and recurrence pattern for your job. Our recommendation is that you fetch the data in every 10 minutes.

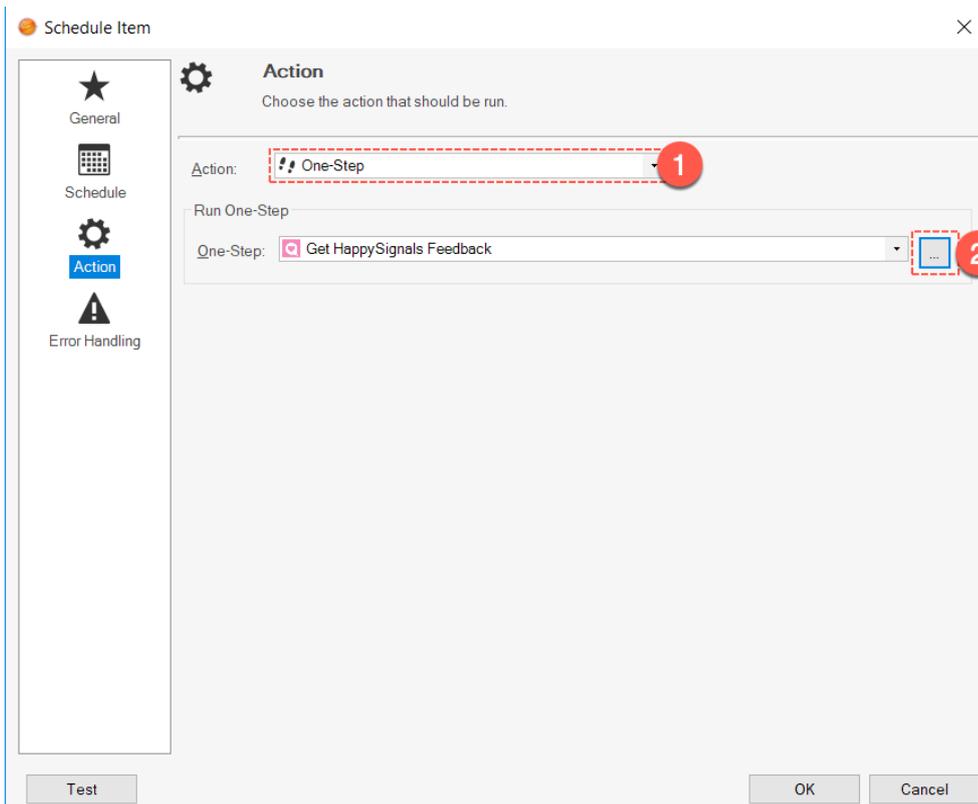


The screenshot shows a dialog box titled "Schedule Item" with a close button (X) in the top right corner. On the left side, there is a vertical navigation menu with four items: "General" (selected with a star icon and a blue highlight), "Schedule" (calendar icon), "Action" (gear icon), and "Error Handling" (warning triangle icon). Below the menu is a "Test" button. The main area of the dialog is titled "Name and Description" with a star icon and the instruction "Enter a name and description for the scheduled item." It contains three fields: "Schedule group:" with a dropdown menu showing "(Default)" and a plus icon; "Name:" with a text input field containing "Happy Signals Integration - Vote Item Import" (highlighted with a red dashed border); and "Description:" with a large empty text area. At the bottom right, there are "OK" and "Cancel" buttons.

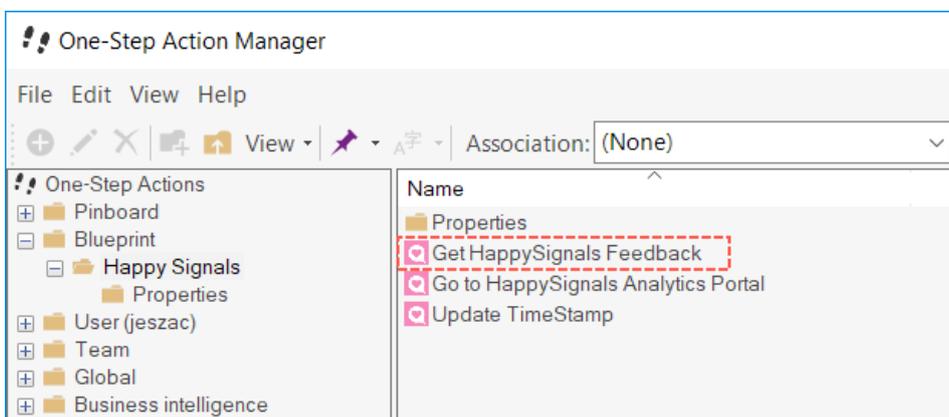
Action

Select the action to run on the schedule job

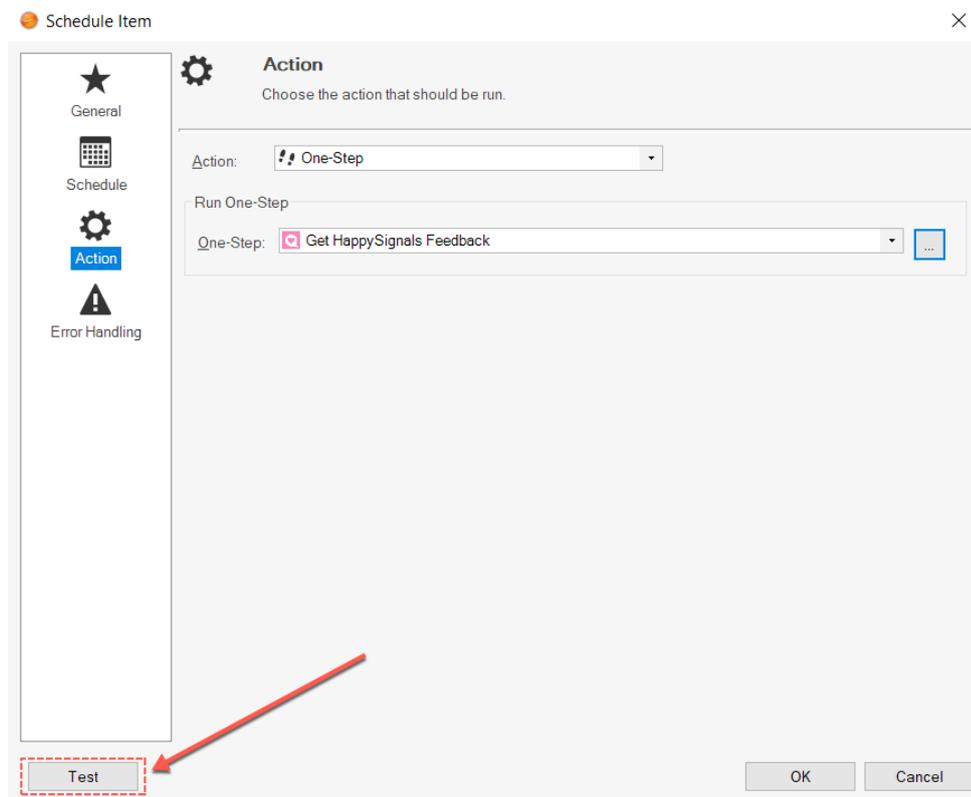
1. Select Action - OneStep
2. Click the Browse button



When selecting the OneStep to run, you'll find the appropriate OneStep in the OneStep Manager Association (None), under the Blueprint Scope, and in the folder 'HappySignals'. Please select the OneStep called 'Get HappySignals Feedback'.



Test run the Feedback Import



Please also verify that the import is running on schedule and new feedbacks are being populated into the Cherwell instance correctly.

5 End-to-End test

After installation and configuring the application it is time to test the solution. You can find more end-to-end test cases from our [support site](#).

Here is how to test that everything works correctly.

1. Create new incident, fill the mandatory fields and resolve the incident.
2. You should receive resolution email with HappySignals voting buttons.
3. Click any of the numbers to open survey form in your browser.
4. Fill the survey form and submit it.
5. Wait until your scheduled job runs (or you can trigger it manually)
6. Check the feedback is visible in the HappySignals Dashboard and you can see all the information in single feedback view.

6 Troubleshooting

Our integration application is very simple, and you will most probably not face any problems after the proper installation. Here are the most common issues you might face

Survey form is not loaded

You should check that your HappySignals Integration Properties has correct information which has been provided you by HappySignals. Please check the HappySignals URL and Shared Secret values

Feedbacks are not loaded back into my Cherwell

Most common problem is that you have wrong API key in your HappySignals Integration Properties. Please check that you have the correct value which has been provided you by HappySignals.

For any issues or if you need help, please contact our support:

support@happysignals.com.