Right Now
Enquiries Management System
Participant Workbook
2007
Enquiry Management System

User Information Manual
1.0 Enquiry Management Project Staff

Welcome to training for ECU's new Enquiry Management System.

The University Executive and members of the Enquiry Management Project Team wish to thank you for your input during the project's development and consultation phase.

Your feedback on the implementation process and the functionality of the new system will continue to be sought. A post implementation review is scheduled for August 2007, and a twelve month review will be conducted in April 2008.

It is anticipated that the system will undergo further refinement and your input into this process will be invaluable.

2.0 Your User Manual

Your User Manual has been developed to provide you with the functional information you need to go back to your workplace and be able to carry out your job once the Enquiry Management System has gone live.

The training material contained in the manual will serve as a reference guide for performing all the functions necessary to the Enquiry Management System.

Updated Training materials will be available on the Enquiry Management Project website http://www.ecu.edu.au/student/enquiry

3.0 The Enquiry management Project

ECU's new Enquiry Management System represents a standardised approach to managing enquiries from students and prospective students.

The underlying principles and process are similar to many other enquiry management systems operating in large service-oriented organisations throughout the world including an increasing number of Australian Universities. Essentially we aim to provide faster, more accurate and more easily accessible information to students, prospective students, staff and visitors to the University.

The University has been moving toward a more formalised system of enquiry management since 2003. Both the IT Service Desk and the Student Contact Centre have been utilising the supporting software for a number of years and report significant improvements in customer service and internal organisational visibility.

The expansion of this system to key service areas across Faculties and Centres represents the next phase in the development of this system.
3.1 The Project Objectives

The new Enquiry Management System is being implemented to assist in improving the quality, accessibility and timeliness of the information provided to our stakeholders. At this stage of development the focus is on student and prospective student enquiries and the new system will be implemented into those areas that have a high volume of these enquiry types.

The Project objectives are:

- develop a standardised system of Enquiry Management;
- enhance opportunities for students and prospective students to self-help;
- build on the existing system;
- develop supporting service standards, business rules & performance indicators;
- develop and instil quality assurance mechanisms;
- deliver training to all staff end-users; and
- develop a sustainable training solution suitable for ongoing training of system users.

3.2 Project Implementation

The project systems are scheduled to Go Live on April 16 2007. There are a number of milestone dates associated with the project implementation and staff should be aware of these:

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Key Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Test Phase Completed (Applications packaged and Rolled-out to all PCs involved)</td>
<td>15/3/07</td>
</tr>
<tr>
<td>End-user Information Sessions Completed</td>
<td>1/3/07</td>
</tr>
<tr>
<td>System Capability Live (applications packaged, tested and deployed to all workstations, Dummy number set up for testing. Training lab set-up to accommodate 10 persons).</td>
<td>31/03/07</td>
</tr>
<tr>
<td>User Acceptance Testing Completed</td>
<td>1/4/06</td>
</tr>
<tr>
<td>Essential Applications Training Completed (Solidus, RightNow,)</td>
<td>13/4/07</td>
</tr>
<tr>
<td>Go Live Date (switch to IVR)</td>
<td>16/4/07</td>
</tr>
<tr>
<td>Customer Service Training Completed</td>
<td>27/4/07</td>
</tr>
<tr>
<td>Project Review Phase Completed – pending outcomes redirect all calls through IVR.</td>
<td>31/8/07</td>
</tr>
<tr>
<td>12 Month Review undertaken.</td>
<td>April 2008</td>
</tr>
</tbody>
</table>
3.3 Enquiry Management Training Modules

As a staff end-user you will be required to complete three formal training modules. These modules are outlined below.

3.3.1 Solidus (Technical Module):
Solidus is a telephony system that operates through the user’s PC. Solidus manages the call flow coming into the University’s main contact and referral points. The Solidus training course will provide participants with a hands-on learning approach to using the new system in a context similar to the workplace.

Module Objectives Are:
- Be able to login, logout and activate the desktop.
- Be able to answer a call.
- Be able to transfer a call.
- Be able to put a client on hold.
- Be able to correctly code a call.

3.3.2 RightNow (Technical Module):
RightNow runs the University’s “Ask Us” data base and manages email and walk-in enquiries at contact and referral points across the University.

Module Objectives Are:
- Be able to log in.
- Be able to retrieve e-mail enquiries.
- Be able to respond to e-mail enquiries.
- Be able to retrieve information and add new information to a response.
- Be able to refer an enquiry to someone else.
- Be able to create an incident.

1.3.3 “At Your Service” (Customer Service):
The “At Your Service” training module looks how your behaviour and attitude impacts on the relationship you have with your customers and on how the University as a whole is perceived by the public. This module encompasses a range of aspects relating to customer service and has been tailored specifically to incorporate the service standards that under-pin the new Enquiry Management System.
Module Objectives Are:

- An understanding of the Enquiry Management Service Standards.
- Develop an understanding of quality customer service.
- To understand the importance of professional presentation in the workplace.
- Be able to apply email etiquette in your workplace.
- Be able to apply appropriate telephone communication skills for ECU.

### 3.4 Accessing your Log-in

Access to RightNow and Solidus can only be obtained once the necessary pre-requisite technical training has been completed.

A Solidus login will be created for you and you will be notified of your access pin once training has been completed.

A RightNow login and password will be created for you and attached to your appropriate staff profile (e.g. Student Support Officer, FAQ Reviewer) once training has been completed. You will be advised of login procedures at the RightNow training session.

### 3.5 Facilitated training

Function specific training is scheduled to run between April 4 and April 27 2007.

Training will be delivered by specialist consultant trainers, members of the Enquiry Management Team and other SSC staff with expert knowledge.

- Training for all technical modules will be held at the Joondalup campus in Training Room 31.234.
- "At Your Service" training sessions will be held at the Joondalup Campus, room 4.224 and the Mt Lawley Campus, room 15.205.

*In situ* training will be provided for Bunbury-based staff.

Please check ORIAN [http://orian.ecu.edu.au](http://orian.ecu.edu.au) for up to date information regarding the scheduling of training.
3.6 Where to Find Help

Staff should contact the following individuals for advice on technical and application related issues.

Solidus - Technical and application support:
- Sonia Light: ext 8506
- Ven Boujos: ext 3834
- Carmel Langdon: ext 5512
- Brian Lambert: ext 5222

Rightnow – Technical and application support:
- Stephen Baker: ext 6330
- Dipesh Shah: ext 6263
- Ven Bojous: ext 3834
- Carmel Langdon: 5512

3.7 Additional Support

The following assistance will be available at ECU from April 16 2007.

- **Logon Assistance** – Logon assistance will be provided during facilitated training sessions.

- **Training Documentation** – will be available from the Enquiry Management System website on [http://www.ecu.edu.au/student/enquiry](http://www.ecu.edu.au/student/enquiry) as well as disseminated to users during training sessions.

- **RightNow** – has extensive online tutorials. You will learn how to use these in the RightNow training session.

- **Solidus** – The Student Contact Centre will provide ongoing training to individuals on an as-needs basis. This will be available to new staff and those staff who are unable to attend the formal training sessions due to sickness or ARL arrangements. Requests for additional training post project roll-out should be made directly to the Student Contact Centre by emailing Julie Langoulant on [j.langoulant@ecu.edu.au](mailto:j.langoulant@ecu.edu.au) (please cc Sonia Light).

It should be noted that staff are required to make every effort to attend the formal training sessions scheduled on ORIAN.
3.8 Enquiry Management Training Material

3.8.1 Resources

This training manual contains general information about Enquiry Management Project.

During training sessions, your trainer will also distribute training materials specific to the course you are in and a course evaluation form.

At the completion of the Enquiry Management System training series your User Manual should contain the following training materials:

Solidus Training Material

- User Notes
- Call Qualifier Codes
- Referral Group Numbers and email address
- Help contacts details

Rightnow Training Material

- RightNow user notes
- Help contact details

At Your Service Training Material

- Enquiry Management Service Standards and Business Rules.
Enquiry Management System

RightNow
Quick Reference Guide
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBJECTIVES</td>
<td>5</td>
</tr>
<tr>
<td>1.0 INTRODUCTION</td>
<td>7</td>
</tr>
<tr>
<td>1.1 Using this Manual</td>
<td>7</td>
</tr>
<tr>
<td>2.0 LOGGING IN</td>
<td>7</td>
</tr>
<tr>
<td>2.1 Where do I log in?</td>
<td>7</td>
</tr>
<tr>
<td>2.2 How do I get access?</td>
<td>8</td>
</tr>
<tr>
<td>3.0 BASIC CONCEPTS</td>
<td>8</td>
</tr>
<tr>
<td>3.1 The Session Console</td>
<td>8</td>
</tr>
<tr>
<td>3.2 The Support Console</td>
<td>9</td>
</tr>
<tr>
<td>3.3 The Answer Console</td>
<td>10</td>
</tr>
<tr>
<td>4.0 INCIDENTS</td>
<td>12</td>
</tr>
<tr>
<td>4.1 Pulling Incidents from a Queue or Multiple Queues</td>
<td>12</td>
</tr>
<tr>
<td>4.2 Re-Assigning an Incident to a Queue</td>
<td>14</td>
</tr>
<tr>
<td>4.3 Re-Assigning an Incident to a Colleague</td>
<td>15</td>
</tr>
<tr>
<td>4.4 Resolving an Incident Assigned to You</td>
<td>16</td>
</tr>
<tr>
<td>4.5 Creating an Incident for a Phone Contact</td>
<td>19</td>
</tr>
<tr>
<td>5.0 ANSWERS</td>
<td>22</td>
</tr>
<tr>
<td>5.1 Proposing an Answer</td>
<td>22</td>
</tr>
<tr>
<td>5.2 Modifying a Proposed Answer</td>
<td>23</td>
</tr>
<tr>
<td>5.3 Creating an Answer from Scratch</td>
<td>25</td>
</tr>
<tr>
<td>6.0 RIGHT NOW GLOSSARY &amp; OVERVIEW</td>
<td>26</td>
</tr>
<tr>
<td>6.1 Customer Pages</td>
<td>26</td>
</tr>
<tr>
<td>6.1.1 Site Access</td>
<td>26</td>
</tr>
<tr>
<td>6.1.2 Tabs</td>
<td>26</td>
</tr>
<tr>
<td>6.1.3 Common Activities</td>
<td>26</td>
</tr>
<tr>
<td>6.2 Staff Pages</td>
<td>28</td>
</tr>
<tr>
<td>6.2.1 Session Console - Toolbar</td>
<td>28</td>
</tr>
<tr>
<td>6.2.2 Session Console</td>
<td>29</td>
</tr>
<tr>
<td>6.3 Support Console</td>
<td>30</td>
</tr>
<tr>
<td>6.3.1 Toolbar</td>
<td>30</td>
</tr>
<tr>
<td>6.3.2 Sidebar</td>
<td>30</td>
</tr>
<tr>
<td>6.3.3 Tabs</td>
<td>31</td>
</tr>
<tr>
<td>6.3.4 Control Buttons</td>
<td>31</td>
</tr>
<tr>
<td>6.3.5 Incident Process Overview</td>
<td>32</td>
</tr>
<tr>
<td>6.4 Answer Console</td>
<td>34</td>
</tr>
<tr>
<td>6.4.1 Toolbar</td>
<td>34</td>
</tr>
<tr>
<td>6.4.2 Sidebar</td>
<td>34</td>
</tr>
<tr>
<td>6.4.3 Control Buttons</td>
<td>35</td>
</tr>
<tr>
<td>6.4.4 Tabs</td>
<td>35</td>
</tr>
<tr>
<td>6.4.5 Process Overview</td>
<td>36</td>
</tr>
</tbody>
</table>
Objectives

At the completion of this session, you should be able to:

- Log into RightNow
- Be able to retrieve e-mail enquiries
- Be able to respond to e-mail enquiries
- Be able to retrieve information and add new information to a response
- Be able to refer an enquiry to someone else
- Be able to create an incident
1.0 Introduction

The document serves as a basic guide for users of the RightNow eServices Customer Service Platform.

When you are working with the RightNow product, you will be fulfilling one or both of two distinct roles. These roles and responsibilities include:

a) Student Support Officer (SSO) / Student Advisor (SA): The functions this role may undertake include pulling incidents into your inbox, re-assigning and resolving incidents, proposing answers. Sections 3, 4 and 5.1 in this reference guide cover typical tasks for the SSO/SA.

b) Content Administrator: The functions this role may undertake include reviewing proposed answers, publishing answers, creating and publishing answers from scratch. Sections 5.2 and 5.3 in this reference guide cover typical tasks for the Content Administrator.

1.1 Using this Manual

During this session you will come across some standard menu path abbreviations that will be used throughout this documentation. These may include the following:

- (M) = Menu
- (B) = Button
- (I) = Icon
- (T) = Tab
- (H) = Hyperlink

Each of the sections contained within this manual includes a typical workflow for completing a particular task. If the workflow is large, it may be referred to and found at the end of this document.

!Note!

Refer to these workflows for assistance if you are having problems with understanding a sequence of tasks. This information is supplemented by images to guide you on the location of icons and menu items.

2.0 Logging in

2.1 Where do I log in?

1. (I) Click on the desktop shortcut

OR

2. (H) http://seek.custhelp.com/cgi-bin/seek.cfg/php/admin/session/login.php

3. Log in using your username and password
2.2 How do I get access?

Your login will have been set by your administrator.

Once you have received training, your staff account will be matched with the profile of the access you should receive. Some staff may have to share a login in the initial stages.

3.0 Basic Concepts

**Icons**

RightNow uses a standard set of icons across the top of the consoles. The icons you will become most familiar with are outlined below.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Log out.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Personal settings, including default settings, default console views or password.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>This button opens the Support or Answer Console. The Support Console is used for managing incident and contact records, and the Answer Console is used for managing answers published on your Web site.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>This button will access help on the current window, open the help contents, open the help index, or access online documentation.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>This button accesses the Links drop-down menu for moving to the end-user interface, or any links to other Web sites added by your RightNow administrator.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>This button refreshes the notifications panel.</td>
</tr>
</tbody>
</table>

**EXERCISE 1**

3.1 The Session Console

The session console is the access point to both your support and answer console.

1. (M) Service Module > Support Console
3.2 The Support Console

Sections 4.1 to 4.5 are tasks accomplished with the use of the Support Console. The Support Console is accessed by clicking on the drop down menu in your Session Console (the console that will automatically open up when you log in) and selecting Support console.

1. Use the Quick Search button to locate an incident by its 12-digit reference number or to locate a contact by first name, last name, email and/or phone number.
2. Incidents assigned to you.
3. Views load a predefined list of records and allow searching through the database. There are incident views and contact views.
4. Reloads the view.
5. Allows individuals to assign a batch of incidents to themselves from the queue they select.
6. Allows creation of new records (incidents and contacts) for phone calls, snail mail etc.
7. Opens the highlighted record into Edit mode. Fields can be modified and changes can be saved from this mode.
8. Sends a copy of the incident details to a specified email recipient.
9. Allows you to propose an answer to be added to the knowledge database.
10. Status. Please see section 4.4.
11. Subject of the enquiry set by the customer.
12. Detail of the enquiry and the response supplied.
13. Save: Saves any modifications to the incident or contact record. Clicking the Save button.
when the Send Response field is ticked will send a response email to the customer.

3.3 The Answer Console

Sections 5.1-5.3 are tasks accomplished with the use of the Answer Console. The Answer Console is accessed by clicking on the drop down menu on your Session Console and selecting Answer Console. Only those staff with access privileges will be able to select this. For other staff the answer console is greyed out.

1. (M) Service Module > Answer Console

1. Use this to locate an answer or meta-answer by its unique ID
2. Views load a predefined list of records and allow searching through the database
3. Reloads the view such that only the records matching the default view and search filters display
4. Allows the creation of new answer and meta-answer records. The Create New Answer and Meta Answer option should always be selected
5. Opens the highlighted record into Edit mode. Fields can be modified and changes saved from this mode.

6. Deletes the highlighted answer from the database. **Use with caution!**

7. Loads an answer with the customer-facing pages’ look and feel.

8. The four default answer statuses are:
   - **Private:** Newly created answers default to this status. An answer can stay set to Draft if it is not ready for review.
   - **Proposed:** A suggestion from an existing incident for a new answer is automatically set to this status.
   - **Public:** Visible to customers if Access Level is set to =Everyone.
   - **Review:** An answer will be set to Review when its review date is reached. It is still visible to customers but the content needs to be verified.

9. Reflects the name of the staff member who is currently responsible for creating/reviewing/publishing the content in the answer.

10. Saves any modifications to the answer or record.
4.0 Incidents

4.1 Pulling Incidents from a Queue or Multiple Queues

One of the initial tasks for the Customer Service Representative (CSR) is to pull incidents into their inbox.

**Note!**

Incidents are not automatically assigned to users. Users identify their availability for resolving issues by pulling incidents into their account.

- **Select (I)** Fill This will:
  - (a) Check the queues that you have access to in order to determine if new incidents are available.
  - (b) If Incidents are available, these are assigned to your queue.
  - (c) Opening or refreshing the My Inbox view will display all the incidents that have been assigned to your queue.

1. On the Support Console, click the ‘Faucet’ icon.

2. Select the ‘My Inbox’ Views from the View Pull-Down

3. Review each entry in the Browser - Each should have your name in the Assigned Column

Incidents Assigned to You

- **(I)** Refresh

It is a good idea to refresh your queue regularly to help you answer incidents quickly.
4.2 Re-Assigning an Incident to a Queue

When the situation arises that you cannot resolve an incident due to workload or availability, you have the ability to re-assign back to a Queue. The basic process is illustrated below:

Re-Assigning an Incident to a Queue

![Flowchart diagram]

1. Highlighting one or more incidents in the My Inbox View (hold down the control button, whilst selecting the incidents you want).
2. Right-click on the incidents
3. Edit Incidents > Messages.
4. If multiple incidents are selected, then changing the Assigned value back to [Null Value] once on the incident will update all selected incidents.
5. Remember to set an appropriate Queue value as well (if the Incident came through on the phone and wasn’t originally assigned a Queue).
6. Save will save the incidents/re-assigned.
4.3 Re-Assigning an Incident to a Colleague

When the situation arises that you cannot resolve an incident due to workload or availability, you have the ability to re-assign to another colleague. The basic process is illustrated below:

Re-Assigning an Incident to a Colleague

Start

Open My Inbox view in Support Console

Re-assign more than 1 incident to the same person?

Y

Holding the SHIFT key down click on all the incidents to re-assign

N

Click on (and highlight) the incident in the browser

Right-Click on the selected entries and select 'Edit Incident' - >Messages

In the Assigned field, select the appropriate user value.

Click on the Update Button

Incident Saved and Re-assigned

Re-assignment is carried out within the Support Console.

!Note!
Confirm with your supervisor before re-assigning incidents to back to another colleague.

As a user you have the ability to re-assign individual incidents or to re-assign a number of incidents.

7. Highlighting one or more incidents in the My Inbox View (hold down the control button, whilst selecting the incidents you want).

8. Right-click on the incidents.


10. If multiple incidents are selected, then changing the Assigned value to a new value once on the incident will update all selected incidents.

11. Remember to set an appropriate Queue value as well (if the Incident came through on the phone and wasn't originally assigned a Queue).

12. (B) Save will save the incidents/re-assigned.
4.4 Resolving an Incident Assigned to You

The most frequent task for a Customer Service Representative is to complete incidents for which they are assigned. You will work all incidents within the Service Console. Any unopened incident assigned to you can be found in the My Inbox view.

EXERCISE 4

EXERCISE 5
An open incident has 3 tabs that can be used to resolve the incident.

1. Messages – is used in order to complete the response
2. Details - any attachments to the message will be found in the Details Tab. If there is an attachment, a paperclip icon will appear on the tab
3. Contact – This contains contact details of the enquirer.

In resolving an incident, a Status must be assigned with its associated Incident Disposition.

Six Status values are available:

**Solved**: selected when a complete answer is provided to the customer

**Unresolved**: set for new incidents that have not been handled

**Updated**: set when a customer sends in additional information

**Pending**: selected when moving an incident from a walk-in queue ready to deal with the face to face customer

**Waiting**: used when information is needed from the customer before the agent can proceed on the issue

**Call back**: selected when assigning a telephone call as an incident to a referral point

1. Open My Inbox
2. Select and open the incident you wish to action
3. Action incident
4. Set status of incident. If status is set to resolved (set to either waiting or resolved), an auto prompt to select a disposition will occur. There are currently 5 values that can be selected:

![Disposition Option](image)

- [No Value]
- Answered with FAQ
- Answered with Text Template
- Referred to SSC Specialist area
- Referred to SSC Student Advisor
- Referred to Faculty

**Note!**

When suggesting answers using the Quick Answer functionality, choose the Text rather than the Link option. If the customer is encouraged to click on a link suggested by a SSO/SA they can open the answer and get access to the Knowledge Base, but any attempt to Ask a Question after that point will result in a re-direct – Customers have to login to their accounts back on Ask Us before they are allowed to Ask a Question.

Hence it is better to give them the Answer text in the response rather than confuse them over when and where they can login to the system.

![Quick Answer Options](image)
4.5 Creating an Incident for a Phone Contact

In some scenarios, you will be working phone support and will be receiving a request over the phone. In these cases, it is important to refer the customer to the Ask Us link as this means that they can then create their own contact record in the system.
Creating an Incident for a Phone Contact

1. Customer Call passed through from Accounts
   - Open Contacts view in Support Console
   - Click on the 'Search' icon
   - From the text search menu select 'All email addresses' - enter the callers email address and select 'Search'
   - Did the search return any results?
     - No: Right-Click on the entry in the browser and select 'Add Incident' from the menu.
     - Yes: On the Details Tab, enter/change the Customers site/team info (if appropriate and time available)
     - Discuss and resolve issue over the phone with customer.
   - On the Messages tab, enter the subject of the customers issue

2. Complete Call
   - Click on the Spell-Check button. Resolve spelling issues
   - Change Status to 'Solved'
   - Has the issue been resolved?
     - Yes: Change Status to 'Waiting'
     - No: Change Incident Disposition to 'Could Not Resolve Issue'
   - Does an Email Response need to be Sent to the Customer?
     - Yes: Click on the 'Update' button
     - No: Change Incident Disposition to 'Work-Around Suggested'
   - Does an Answer need to be proposed?
     - Yes: Click on Quick Answer - Add Answer ID and click on 'Text'
     - No: Change Incident Disposition to 'Resolved Customer Issue'

Searching for an existing Contacts record is accomplished by selecting the Contacts view and then selecting the appropriate email address after clicking on the Search Icon.
Having a customer record already in the system prevents you from having to create one for them (a process not shown in the above flow diagram).

**Note!**

- The primary reason is the importance of getting correct information in the Contact record.
- The potential for human error in a time-sensitive environment like a customer service centre means that email addresses can be easily misspelled.
- Given that our system relies on an accurate email address to respond to a customer it is important to populate all the Browser and Referrer data accurately, and therefore is better to re-direct customers to the Answer Knowledge-base.

Please refer to the previous section for details on selecting appropriate Status and Incident Disposition fields.
5.0 Answers

5.1 Proposing an Answer

Proposing an Answer is available to all users able to access the Support Console.

Proposing An Answer

An Answer should be proposed when you experience a situation where an unusual incident is being dealt with.

It is a good practice to generate a matching Answer in order to deflect these queries if they are encountered in the future.

1. Highlight one or more incidents within the View Browser (whilst holding down the SHIFT key).
2. Right click on the incidents
3. (M) propose OR (I) Propose Incident icon on the main tool-bar

Start

Open My Inbox view in Support Console

Y Propose more than 1 Answer?

N

Holding the SHIFT key down click on all the incidents to propose

Click on (and highlight) the incident in the browser

Right-Click on the selected entries and select ‘Propose’

Right-Click on the entry and select ‘Propose’

In the Confirmation pop-up, confirm that the Answers are to be created.

Incidents Proposed
5.2 Modifying a Proposed Answer

Working a proposed answer and publishing the answer requires profile permissions to do so. When an Answer is published it is visible to the wider user community.

Modifying a Proposed Answer

Start

- Open the Answer Console and click on the Search icon.
- Select the Status of 'Proposed'. Click Search
- Select the Answer that you wish to review and edit - Double Click to Open.

- Click on the Meta-Answer tab - Confirm that the appropriate product/category has been selected.
- Meta-Answer details need to be updated?
  - Y: Edit appropriate fields
  - N: Click on the Answer Tab.

- Edit Summary Field
- Cut erroneous information out of the Question box
- Right Click on the Incident in the browser view and select 'Preview Answer'

- Click on the Refresh Icon on the Answer Console toolbar to refresh the view
- Save Answer by clicking on the Update button

- Assign Self or Colleague to Answer by selecting a name from the Assigned field.
- Add keywords to Answer by populating the Keyword field.

- Change the Status to 'Public' to Publish the Answer
- Does the Answer need to be reviewed at a later Date?
  - Y: Set a date value in the 'Review On' field.
  - N: Answer Published

- Open the Answer again by double-clicking on the Answer in the Browser
- Close the Preview Window.

- Does the Answer need to be reviewed at a later Date?
  - Y: Set a date value in the 'Review On' field.
  - N: Answer Published

Version 1.0 Copyright © Edith Cowan University 2007 Page 23 of 37
1. Open the Answer console

2. (I) Search

3. Select appropriate categorisation on the Meta-Answer tab.

4. If the Area of Enquiry field has a cross next to it, this can be expanded (like in windows explorer) to select and appropriate sub-area

5. Define the keywords. As a rule of thumb, there should be between 2 - 5 keywords within the keywords field.

   5.1. Keywords are separated by commas.

   5.2. Similar words do not have to be repeated – rules, rule and ruling have similar word stems ('rul' in the above example). Keyword searches are done on stems rather than the full keywords.

   5.3. It is important to only define keywords that are specific to the issue identified in the Answer – therefore ‘ECU’ or ‘University’ would be very poor keywords as they are applicable to a great number of answers.

6. Answers that are given a ‘Review On’ date value need to be closely monitored

   ![Review On](image)

   !Note!

   - When the set date on an answer arrives, the Answer status is going to be changed to ‘Review’, taking the Answer out of Public status if it was originally in Public Status.
   - This should only be set for Answers that are only valid for a set period of time or, alternatively, need to be regularly reviewed by ECU personnel.
   - The answer will still be available for the end user to see while in Review status, so it is important to update your assigned
5.3 Creating an Answer from Scratch

Creating Answers from Scratch requires much the same sequence of tasks as updating a Proposed Answer.

Creating an Answer from Scratch

1. Start
2. Open the Answer Console and click on the page icon on the top left-hand side of the screen.
3. Select Create Answer/Meta Answer from the Drop-Down menu.
4. Click on the Meta-Answer tab - Enter a Summary. Select the appropriate product/category.
5. Click on the Answer Tab.
6. Paste Summary field into the Question field. Expand on Question detail if necessary.
7. Click on the Answer radio button.
8. Open the Answer again by double-clicking on the Answer in the Browser.
9. Right Click on the Incident in the browser view and select Preview Answer.
10. Click on the Refresh Icon on the Answer Console toolbar to refresh the view.
11. Does the Answer need to be reviewed at a later date?
   - Y: Set a value in the 'Review On' field.
   - N: Change the Status to 'Public' to Publish the Answer.

Answer Published

12. Save Answer by clicking on the Update button.
13. Assign Self or Colleague to Answer by selecting a name from the Assigned field.
14. Add keywords to Answer by populating the Keyword field.
15. Edit Summary Field by pasting value from Summary field on the Meta-Answer tab.

Version 1.0

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6.0 Right Now Glossary & Overview

6.1 Customer pages

6.1.1 Site Access

<table>
<thead>
<tr>
<th>Accessing the Site</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customers can access the Knowledgebase and Incident Management area by clicking on numerous links on your home page.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>You can type http://&lt;your_interface&gt;.custhelp.com.</strong></td>
<td></td>
</tr>
</tbody>
</table>

6.1.2 Tabs

<table>
<thead>
<tr>
<th>Answers</th>
<th>Things that can be done from the Answers tab include:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Search for and view answers</td>
</tr>
<tr>
<td></td>
<td>• Subscribe to answers</td>
</tr>
<tr>
<td></td>
<td>• Rate answers</td>
</tr>
<tr>
<td></td>
<td>• Print and email answers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ask A Question</th>
<th>If customers do not find the answer to their question, they can submit a question to customer support. Customers might need to specify the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Email address</td>
</tr>
<tr>
<td></td>
<td>• A topic that matches their question, which helps the question get routed properly</td>
</tr>
<tr>
<td></td>
<td>• Applicable User IDs/Account Numbers</td>
</tr>
<tr>
<td></td>
<td>• Details about their question</td>
</tr>
</tbody>
</table>
### 6.1.3 Common Activities

#### Logging In
1. Click either the My Stuff or Login tab.
2. Enter your email address and password.

#### Logging Out
There are two methods of logging out:
- a. Click the Logout tab or
- b. Access the Answers or the My Stuff tab, and click the If you are not <first_name last_name>, click here link.

#### Retrieving Passwords
1. While logged out of the site, click either the My Stuff or the Login tab.
2. In the area labelled If you have forgotten your password... enter your email address.
3. Click the Email Me My Password button.

#### Changing Passwords
1. Log in.
2. From My Stuff select the Profile button or the Account Profile option.
3. In the subsection titled Account reset the value in the Password field.
4. Re-enter the new password in the Verify Password field as well.
5. Scroll to the bottom and click the Save Changes button.

#### Answers - Searching
Customers can search for answers in the following ways:
- Select a topic from the drop-down menu and click the Search button.
- Type in keywords and click the Search button.
- Select a topic, type in keywords and click the Search button.
- Page through the answer list.
- Switch the Search By method to Answer ID, enter an Answer ID provided to them by agents on the phone and click the Search button.
| Answers - Subscribing | 1. View the answer that you wish to subscribe to.  
2. Click the Notify Me by Email if this Answer is Updated button.  
3. Provide login information so the subscription can be stored properly. |
|----------------------|-------------------------------------------------------------------------------------------------|
| Answers - Subscription Renewal or Deletion | 1. Log in.  
2. From the My Stuff tab, select the Notifications button or the Answer Update Notifications option.  
3. Click the link displaying the subscription you would like to change.  
4. Click the Renew/Delete button on the Answer Detail page. |
| Questions – Submitting and Smart Assistant | As customers fill out the Ask A Question form and submit it, they will be shown some automatic suggestions from the knowledgebase. They need to click the Finish Submitting Question button from this Smart Assistant screen to complete their submission. |
| Questions – Viewing / Updating | 1. Log in.  
2. From the My Stuff tab select Questions.  
3. Click on the subject of the question to be viewed.  
4. From the Question Detail screen, a question can be updated if it is not solved, and it can be updated for seven days after it was solved by clicking the Update Question button. |

### 6.2 Staff Pages

#### 6.2.1 Session Console - Toolbar

- ![Log Out](image)  
  **Click this button to log out.**

- ![Settings](image)  
  **Click this button to change personal settings, including default settings, default console views or password.**

- ![Support Console](image)  
  **Click this button to open the Support or Answer Console. The Support Console is used for managing incident and contact records, and the Answer Console is used for managing answers published on your Web site.**
### 6.2.2 Session Console

#### CHANGING YOUR SETTINGS

1. Click the Personal Settings icon.
2. Select the Personal Settings option.
4. Click Default Console Views.
5. Select My Inbox in the Support field.
6. Select the appropriate view in the Answer Console field.
7. Click the Save button.

#### Customising Your Password

1. Click the Personal Settings icon.
2. Select the Change Password option.
3. Enter the existing password in the Old Password field. Enter your new password in both the New Password and Confirm fields.
4. Click the OK button.

#### Loading the Support Console

Click the Support Console icon. A new window will open where you can handle incidents.

#### Notifications

1. Notification of an incident/answer assignment/reassignment appears here.
2. The list can be reordered by clicking the column headings.
3. Double-click an Incident Assignment notification to open the corresponding incident. (This can also be done from the Support Console.)
4. Highlight the notification and click the icon to delete it. Deleting a notification does not affect the record it's tied to.


<table>
<thead>
<tr>
<th>Notification Icons and Columns</th>
<th>After selecting a notification, click this button to delete the notification.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click this button to delete all notifications.</td>
</tr>
<tr>
<td></td>
<td>Click this button to refresh the notifications panel.</td>
</tr>
<tr>
<td></td>
<td>Displays who sent the email or email notification.</td>
</tr>
<tr>
<td></td>
<td>Displays the type of notification (for example, announcement, incident notification, auto reminder).</td>
</tr>
<tr>
<td></td>
<td>Displays a summary of the notification, including the incident reference number or the answer ID for notification emails.</td>
</tr>
<tr>
<td></td>
<td>Displays the date and time when the notification was sent.</td>
</tr>
</tbody>
</table>

6.3 Support Console

6.3.1 Toolbar

Page 23

- **Quick Search**: Use this search option to locate an incident by its 12-digit reference number or to locate a contact by first name, last name, email and/or phone number.
- **My Inbox**: Views load a predefined list of records and allow searching through the database. There are incident views and contact (customer) views.
- **Refresh**: Reloads the view such that the only records matching the default view and search filters display.
- **Search**: This search method depends on the selected view. Incident views allow you to locate an incident by the keywords/email address/contact name. Contact views allow you to locate contacts by name/email address/certain user IDs.
- **Fill**: Allows individuals to assign a batch of incidents to themselves from the queue they select.
- **New**: Allows creation of new records (incidents and contacts) for phone calls, snail mail, etc.
- **Edit**: Opens the highlighted record into Edit mode. Fields can be modified and changes can be saved from this mode.
- **Forward**: Sends a copy of the incident details to a specified email recipient. This feature should be used according to process doc.
- **Print**: Allows you to print a hard copy of incidents and contact information.
- **Propose**: Allows you to propose an answer to be added to the knowledgebase.

6.3.2 Sidebar

<table>
<thead>
<tr>
<th>Reference #</th>
<th>The 12-digit number that identifies each incident as unique.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact</td>
<td>Information of the person who will receive an agent response to the incident.</td>
</tr>
<tr>
<td>Status</td>
<td>Default statuses are as follows:</td>
</tr>
<tr>
<td></td>
<td><strong>Unresolved</strong> – Set for new incidents that have not been handled.</td>
</tr>
<tr>
<td></td>
<td><strong>Updated</strong> – Set when a customer sends in additional information.</td>
</tr>
<tr>
<td></td>
<td><strong>Waiting</strong> – Used when information is needed from the customer before the agent can proceed on the issue. Incidents are automatically set to Solved 48 hours after being set to Waiting.</td>
</tr>
<tr>
<td></td>
<td><strong>Solved</strong> – Selected when a complete answer is provided to the customer.</td>
</tr>
<tr>
<td><strong>Assigned</strong></td>
<td>Reflects the name of the agent who is handling the incident.</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>Customers set this field to indicate what product they need assistance with.</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Agents set this field to further classify the incident that was handled.</td>
</tr>
<tr>
<td><strong>SLA</strong></td>
<td>Used to track service level requirements for contacts and organizations, and to control the amount of support they receive.</td>
</tr>
<tr>
<td><strong>Queue</strong></td>
<td>A pool of incidents that reflect a particular handling process.</td>
</tr>
<tr>
<td><strong>Disposition</strong></td>
<td>A feature for classifying incident resolution.</td>
</tr>
</tbody>
</table>

### 6.3.3 Tabs

**Messages**

This tab contains the incident summary and existing conversation threads.

- Emotive Ratings show for existing threads:
  - Customer
  - Staff

- From this tab you can create the following new threads:
  - Customer Entry - Capture the contact’s phone/snail mail question
  - Response - Agent response
  - Note - Add internal notes from other systems or for escalation

- There are several tools available to help you build the content of your response. Content options are as follows:
  - Standard Text...
  - Suggestions...
  - Search...
  - Quick Text...
  - Quick Answer...

**Details**

Additional incident information is available from this tab.

- Custom fields
- File attachments are located under the Files radio button

**Contact**

The contact tab holds the details of the customer associated with an incident.

- The top portion of the tab displays first name, last name, email address, login and password. Login/Password are used by the customer to access the end-user pages.
- Custom fields.
- A complete incident history for a contact can be accessed from the Incidents radio button.
- A list of all the actions taken on a record in the knowledge base, can be accessed from the Audit Log radio button.
- An incident can be associated with a different customer from this tab as well as by clicking

### 6.3.4 Control Buttons

<table>
<thead>
<tr>
<th><strong>Save</strong></th>
<th>Saves any modifications to the incident or contact record. Clicking the Save button when the Send Response field is checked will send a response email to the customer.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancel</strong></td>
<td>Exits the Edit mode without saving changes.</td>
</tr>
<tr>
<td><strong>Send Response</strong></td>
<td>When this check box is selected and the incident is saved, a response email is sent to the</td>
</tr>
</tbody>
</table>
Activates once the Send Response check box is selected. From here blind carbon copies and file attachments can be configured for response emails.

Spellchecking should always be used prior to sending a customer response.

Will send a copy of the selected incident to a selected email address.

Prints the selected incident.

6.3.5 Incident Process Overview

**SEARCHING FOR INCIDENTS – QUICK SEARCH**

1. Click the Quick Search icon and select Incident Search.
2. Type a reference number in the text box or select a previously edited incident from the drop-down menu, and click the Search button to open the incident for editing.
3. To edit a previously accessed answer, select the answer from the drop-down menu and click the Edit button.

**Note:** You can search for an incident using a portion of the reference number. The search will return all incidents matching the partial string.

**Searching for Incidents – Full Search**

1. Click the Search icon.
2. Select the appropriate values from the search selection criteria menus.
3. Click the Search button.

**Note:** To reset the selection and search criteria, click the Reset button.

**Responding to Incidents**

1. Open the desired incident. You can do this by:
   a. Using the quick search method.
   b. Using the full search method.
   c. Double-clicking the incident in the current view.
   d. Highlighting the incident in the current view and clicking the Edit icon.
   e. Right-clicking the incident in the current view and selecting Edit Incident.
2. Enter a response in Response Thread using standard text/answers/free text.
3. Enter notes in the Notes Thread (if applicable).
4. Set sidebar fields appropriately.
5. Select the Send Response check box.
6. Click the Save button.
### INCLUDING FILE ATTACHMENTS

1. Click the Details tab.
2. Select the Files radio button.
3. Click the **Browse...** button.
4. Locate the file and click the Open button to upload it to the incident.
5. If the attached file also needs to be sent with an incident response email, select the **Send Response** check box and click the **Options...** button.
6. Select the check box next to the file attachment(s) to be sent with the email.
7. Click the OK button.

### Creating Incidents for Actual Contacts

1. Search for the contact name to see if the contact exists.
2. If the contact exists, right-click and select Add Incident, and continue to step 4.
3. If the contact does not exist, click the **New...** icon and select Incident.
4. Capture the customer's question in the Customer Entry thread.
5. Enter the contact's information on the Contact tab.
6. Set sidebar fields appropriately.
7. Set the Source field on the Details tab appropriately.
8. Take additional action (response, note, reassign).
9. Click the **Save** button.

### Escalating / Reassigning Incidents

1. Edit the incident(s).
2. Set the sidebar fields as follows:
   - **Queue**: Select appropriate value
   - **Status**: Unresolved
   - **Assigned**: Desired staff name
   - **Product**: Select best appropriate value
   - **Category**: Select best appropriate value
3. Click the **Save** button.

### Re-queuing Incidents

1. Edit the incident(s).
2. Set the sidebar fields as follows:
   - **Queue**: Select appropriate value
   - **Status**: Unresolved
   - **Assigned**: Blank
   - **Product**: Select best appropriate value
   - **Category**: Select best appropriate value
3. Click the **Save** button.

### Forwarding Incidents

To send a copy of an incident via an external email using the forward feature:

1. Highlight or right-click the incident, and click the **Forward** icon, or select Forward.
2. In the Send To field, type the recipient’s email address, or select it from the drop-down menu.
3. Check to send the contact’s information (email, etc.) and decide whether it is appropriate to send note threads.
   - **Send Primary Contact Information**
   - **Exclude notes**
4. Include any appropriate file attachments.
5. Include comments for the recipient with any needed special instructions.
6. Take additional action on the incident as appropriate.
7. Click the Send button.

### Changing Contact Association

1. From the edit mode on the incident, click the Contact tab.
2. Click the Change Contact curved arrow icon in the upper right corner.
3. Select the Associate Existing Contact option to search for the correct contact record. If it exists, select it and skip to step 5.
4. If the correct contact does not exist, click the **Create New Contact** icon, select Create New Contact, and...
enter the contact information.

5. Click the **Save** button.

### Merging Contact Records

If it is determined that one customer has duplicate contact records, they can be manually combined into one account with a complete incident history:

1. Determine which record has more incidents – this will be the primary contact record and all other contact records will be non-primary.
2. Perform a search to find incidents associated with the non-primary account.
3. Using the Changing Contact Association process above, update and associate each incident in the non-primary account with the primary record.
4. Delete the non-primary record or let a lead know that this can be done.
5. Update the primary record to include all email addresses that will be used for future communication.
6. Click the Save button.

### 6.4 Answer Console

#### 6.4.1 Toolbar

| **Quick Search** | Use this search option to locate an answer or meta-answer by its unique ID. |
| **Answers All** | Views load a predefined list of records and allow searching through the database. |
| **Refresh** | Reloads the view such that the only records matching the default view and search filters display. |
| **Search** | This search option depends on the selected view and includes search selection criteria, such as searching by status or assigned. |
| **New** | Allows the creation of new answer and meta-answer records. The Create New Answer and Meta-Answer option should always be selected. |
| **Edit** | Opens the highlighted record into Edit mode. Fields can be modified and changes can be saved from this mode. |
| **Print** | Allows you to print a hard copy of the answer. |
| **Preview** | Loads an answer with the customer-facing pages’ look and feel. |

#### 6.4.2 Sidebar

| **Answer ID** | The number that identifies each answer as unique. |
| **Status** | The four default answer statuses are:

  - **Private** – Newly created answers default to this status. An answer can stay set to Draft if it is not ready for review.
  - **Proposed** – A suggestion from an existing incident for a new answer is automatically set to this status.
  - **Public** – Visible to customers if Access Level = Everyone.
  - **Review** – An answer will be set to Review when its review date is reached. It is still visible to customers but the content needs to be verified. |
| **Language** | Set the language according to your interface. |
| **Access Level** | Set the access levels according to SLA and privileged access requirements. |
| **Assigned** | Reflects the name of the staff member who is currently responsible for creating/reviewing/publishing the content in the answer. |
| **Review On** | The date at which the answer should be flagged for review. |
| **Publish On** | The date at which the answer should automatically be set to Public and become visible to customers. |
| **Display Position** | A newly created and published answer displays near the bottom of the list by default. This field... |
can be used to override the default and specify a different position in the list.
- Fix will put the answer at the specified location (top, middle or bottom) and leave it there regardless of historical usefulness.
- Place will put the answer at the specified location (top, middle or bottom) and then it will rise or fall according to historical usefulness.

6.4.3 Control Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Saves any modifications to the answer record.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Exits the Edit mode without saving changes.</td>
</tr>
<tr>
<td>Notify Subscribers</td>
<td>If the changes being saved warrant an update for customers subscribed to the answer, select when they should receive their notification from this field.</td>
</tr>
<tr>
<td>Spelling</td>
<td>Spellchecking should always be used prior to saving.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the selected answer.</td>
</tr>
</tbody>
</table>

6.4.4 Tabs

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer Text</td>
<td>This tab contains the content of the answer in the following fields:</td>
</tr>
<tr>
<td></td>
<td>- Summary – Should be a succinct phrase that captures the main topic of the answer.</td>
</tr>
<tr>
<td></td>
<td>- Keywords – Should only contain words that do not appear in the answer, such as common misspellings or synonyms.</td>
</tr>
<tr>
<td></td>
<td>- Question – A detailed version of the question that is answered by this answer record.</td>
</tr>
<tr>
<td></td>
<td>- Answer – The detailed answer information.</td>
</tr>
<tr>
<td></td>
<td>- Text vs. HTML – Always edit and save the answer in HTML mode.</td>
</tr>
<tr>
<td>Details</td>
<td>Contains additional information about the answer:</td>
</tr>
<tr>
<td></td>
<td>- Custom fields</td>
</tr>
<tr>
<td></td>
<td>- Notes</td>
</tr>
<tr>
<td></td>
<td>- Files: These will be accessible from the customer pages.</td>
</tr>
<tr>
<td>Meta-Answer</td>
<td>• You must select both an Area of Enquiry and a Question Type for an answer to be visible on the end-user page.</td>
</tr>
<tr>
<td></td>
<td>• Select the appropriate Area of Enquiry/subs from this tab.</td>
</tr>
<tr>
<td></td>
<td>o Answers can be associated with more than one value from this list and will then be returned in searches on any of those values.</td>
</tr>
<tr>
<td></td>
<td>o To select only some of the sub-areas, expand the product level, and select or deselect desired values.</td>
</tr>
<tr>
<td></td>
<td>• Select the appropriate Type of Enquiry.</td>
</tr>
</tbody>
</table>
### 6.4.5 Process Overview

#### Searching for Answers – Quick Search

1. Click the **Quick Search** icon and select Answer Search.
2. Type the ID number in the Answer ID field and click the **Edit** button.
3. To edit a previously accessed answer, select the answer from the drop-down menu and click the **Edit** button.
4. To view a previously accessed answer, select the answer from the drop-down menu and click the **View** button.

#### Searching for Answers – Full Search

5. Click the **Search** icon.
6. Select the appropriate values from the search selection criteria menus.
7. Click the **Search** button.

**Note:** To reset the selection and search criteria, click the **Reset** button.

#### Proposing Answers from an Incident

After resolving the customer incident . . .

1. Select the incident and click the **Propose** icon.
2. Click the **OK** button at the propose answer prompt. The incident is automatically added to the Answer Console as a proposed answer.

#### Proposing Answers Without an Incident

Send an email to the appropriate staff member. Include the following:

- Question
- Summary
- Answer
- Explanation

#### Creating Answers

1. Click the **New** icon and select New Meta-Answer & Answer.
2. Set the status appropriately.
3. Set the language appropriately.
4. Set the access level.
5. Select the staff member to whom the answer is assigned.
6. Set a Review On date (e.g., +6 months), if applicable.
7. Set a Publish On date, if applicable.
8. Set the Display Position appropriately.
9. Click the Answer Text tab and enter Summary, Question and Answer information in their respective fields.
10. Click the Details tab, and enter any notes, complete any custom fields or add attachments.
11. Click the Meta-Answer tab:
   a. Select the appropriate area of enquiry.
   b. Select the appropriate question type.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>12.</strong> Click the Preview icon to verify the format, and validate links and attachments.</td>
<td><strong>13.</strong> Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td><strong>Adding a Web link</strong></td>
<td><strong>1.</strong> Highlight the words you want to have as the link.</td>
</tr>
<tr>
<td></td>
<td><strong>2.</strong> Click the hyperlink icon 🌐 in the WYSIWIG editor.</td>
</tr>
<tr>
<td></td>
<td><strong>3.</strong> Enter the URL address into the Link field.</td>
</tr>
<tr>
<td></td>
<td><strong>4.</strong> Verify the words you want to act as the link are in the Text field.</td>
</tr>
<tr>
<td></td>
<td><strong>5.</strong> Click the OK button. The words should now be showing up as a link in your answer field.</td>
</tr>
<tr>
<td><strong>Adding an Attachment</strong></td>
<td><strong>1.</strong> Click the Details tab.</td>
</tr>
<tr>
<td></td>
<td><strong>2.</strong> Verify the Files radio button is selected at the bottom of the screen.</td>
</tr>
<tr>
<td></td>
<td><strong>3.</strong> Click the <strong>Browse...</strong> button.</td>
</tr>
<tr>
<td></td>
<td><strong>4.</strong> Locate the file and click the Open button to upload it to the answer.</td>
</tr>
<tr>
<td><strong>Modifying Answers</strong></td>
<td><strong>1.</strong> There are several ways to modify answers:</td>
</tr>
<tr>
<td></td>
<td>a. Double-click the answer from the current view.</td>
</tr>
<tr>
<td></td>
<td>b. Right-click the answer from the current view and select Edit Answer.</td>
</tr>
<tr>
<td></td>
<td>c. Highlight the answer from the current view and click the Edit icon.</td>
</tr>
<tr>
<td></td>
<td>d. Use the Quick Search feature.</td>
</tr>
<tr>
<td></td>
<td>e. Use the full Search feature.</td>
</tr>
<tr>
<td></td>
<td><strong>2.</strong> Modify the content as needed.</td>
</tr>
<tr>
<td></td>
<td><strong>3.</strong> Verify selections for products and categories on the Meta-Answer tab.</td>
</tr>
<tr>
<td></td>
<td><strong>4.</strong> Click the Preview Answer icon to verify the format, and validate links and attachments.</td>
</tr>
<tr>
<td></td>
<td><strong>5.</strong> Update the status.</td>
</tr>
<tr>
<td></td>
<td><strong>6.</strong> Set the access level.</td>
</tr>
<tr>
<td></td>
<td><strong>7.</strong> Update the Review On date.</td>
</tr>
<tr>
<td></td>
<td><strong>8.</strong> In the Details tab, make a note briefly explaining what you modified.</td>
</tr>
<tr>
<td></td>
<td><strong>9.</strong> Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td><strong>Reviewing Answers</strong></td>
<td><strong>1.</strong> From the Session Console, double-click the Answer Notification to open it in Edit mode.</td>
</tr>
<tr>
<td></td>
<td><strong>2.</strong> Modify the content as needed.</td>
</tr>
<tr>
<td></td>
<td><strong>3.</strong> Verify appropriate selections for products and categories in the Meta-Answer tab.</td>
</tr>
<tr>
<td></td>
<td><strong>4.</strong> Click the Preview Answer icon to verify format, and validate links and attachments.</td>
</tr>
<tr>
<td></td>
<td><strong>5.</strong> Update the status.</td>
</tr>
<tr>
<td></td>
<td><strong>6.</strong> Review the access level.</td>
</tr>
<tr>
<td></td>
<td><strong>7.</strong> Set a new Review On date.</td>
</tr>
<tr>
<td></td>
<td><strong>8.</strong> In the Details tab, make a note briefly explaining what you modified.</td>
</tr>
<tr>
<td></td>
<td><strong>9.</strong> Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td><strong>Archiving Answers</strong></td>
<td><strong>1.</strong> Open the answer you want to edit.</td>
</tr>
<tr>
<td></td>
<td><strong>2.</strong> Set the status.</td>
</tr>
<tr>
<td></td>
<td><strong>3.</strong> Set the Review On date to no value (i.e., no review date).</td>
</tr>
<tr>
<td></td>
<td><strong>4.</strong> Modify/add any relevant notes to the Details tab.</td>
</tr>
<tr>
<td></td>
<td><strong>5.</strong> Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
### RightNow Participant Exercises

#### EXERCISE 1
1. Find the shortcut to RightNow and login to the Service module using your login and password.
2. Select the Support console from the session console.

#### EXERCISE 2
1. Use the View menu to access the “My Inbox” view.
2. Refresh the list.

#### EXERCISE 3
1. Open the first incident from your list.
2. Reassign this incident to the trainee who has the next highest number to yours (i.e. if you are train15, assign it to train16; if you are train30, assign this to train15).

#### EXERCISE 4
1. Open the second incident from your list. Review the incident and determine how you will answer it (i.e. Standard Text, Smart Assist suggestions, or free text).
2. Send your response.

#### EXERCISE 5
1. Refresh your “My Inbox” list.
2. Check to see if you have been assigned another incident from another trainee.

#### EXERCISE 6
1. Re-assign the above incident back to the SSC Training queue.

#### EXERCISE 7
1. Logout of the service module.
At the end of the phone call:

**NO**

1. This is very easy to do.
2. Just click on “Ask Us” from the ECU home page.
3. The first time you need to submit a question, the system will prompt you to set up an account.

**YES**

Do you know about our new enquiry system?

Could you please give me your surname? (And e-mail address if necessary)

This is a new system to allow you to submit your responses through a web page and save time and a phone call.

Many of your questions will be automatically answered by the system, however you can also submit your question direct to us also through the system.
At the **start** of the phone call:

- **Could you please give me your surname? (And e-mail address if necessary)**
  - **No record found**
  - **Do you know about our new enquiry system?**
    - **Have you opened a new account through “Ask Us”?**
      - **This is a new system to allow you to submit your responses through a web page and save time and a phone call.**
      - **Many of your questions will be automatically answered by the system, however you can also submit your question direct to us also through the system.**

1. This is very easy to do.
2. Just click on “Ask Us” from the ECU home page.
3. The first time you need to submit a question, the system will prompt you to set up an account.