



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE



## **Advanced Knowledge Base**

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## Introductions

- Penni Kolpin, Knowledge Base Administrator
- Willie Eide, Service UI Lead
- Doug Warner, Director End-User Experience and Research
- Neal Richter, Head of Research

## Goals

- Interactive discussion on advanced answer management topics
- Less lecture / more discussion and demonstration
- Address topics broad enough for most advanced users
- 8.x features of interest specific to KB management
- Specific topics addressed after the session or with Ask the Experts

## Prepared discussion topics

- Content submittal process and tracking
- Content review and publication process
- Analyzing session data
- Useful custom reports
- Some answer-related 8.x features

## Answer Content Submittal

- Staff suggest new answers or provide updates to existing answers
- Track specific information such as submitter, content provider, and action taken (disposition)
- Route incidents to KB team via separate queue
  - Answer feedback
  - Separate mailbox
  - Create at RightNow Console and manually assign to KB queue
- KB engineers work through incidents to address answer content
- Set incident fields specific for tracking content submittals

# Answer Content Submittal Screenshot

Reference #	Subject	Status	Contact	Assigned
1	070807-000000 Answer 2199	Solved	Scott Cahill	Scott Cahill
2	070806-000092 add keywords to #1575?	Solved	Julianne Burgan	Julianne Burga
3	070717-000002 Lightbulb: Version 8 Agedatabase Erro	Solved	Vicki Crawford	Vicki Crawford
4	070803-000000 Additions to Answer 1993	Solved	Brian Schneider	Brian Schneide
5	070802-000004 Update to answer 743 - Error Processin	Solved	Kenny Tietz	Kenny Tietz
6	070801-000000 typo in #2378	Solved	Julianne Burgan	Julianne Burga
7	070618-000001 FWD: v8 - Broadcast Notifications - no	Solved	Holly Laird	Holly Laird
8	070723-000005 FWD: v8 install error: The remote serv	Solved	Holly Laird	Holly Laird
9	070727-000001 Answer id 2492	Solved	Anita Zabel	Anita Zabel
10	070607-000000 Encryption error when responding to an	Solved	Mike Zupan	Vicki Crawford
11	070723-000277 FWD: OSA V8 customised fields not wo	Solved	Kyle Suta	Kyle Suta
12	070723-000279 answer 1610	Solved	Scott Cahill	Scott Cahill
13	070720-000001 answer #997 typo	Solved	Julianne Burgan	Julianne Burga
14	070717-000000 suggestion for KB #153	Solved	Julianne Burgan	Julianne Burga
15	070709-000001 Update to published answer ID 2147	Solved	Rhonda Daley	Scott Cahill
16	070711-000001 Software Conflict Opening RightNow Sc	Solved	Chris Johnson	Chris Johnson
17	070706-000000 answer 1510	Solved	Scott Cahill	Scott Cahill

# Workspace with Custom Fields for Content Tracking

The screenshot shows a software interface for incident management. At the top, the window title is "070817-000004". Below the title bar is a menu with options: New, Save, Save and Close, Offer Advisor, Propose, and Help. The main form contains the following fields:

- Subject\***: Feedback for Answer ID 1 (Rated Helpfulness: 75%)
- Reference #**: 070817-000004
- Contact\***: Ray Jones
- Status\***: Unresolved
- Organization Name**: [Empty]
- Assigned**: KB Engineers, Penni Kolpin
- Product**: [No Value]
- Disposition**: [No Value]
- Category**: [No Value]

Below the form is a tabbed interface with tabs for Messages, Details, Session (34), Audit Log, Attachments, Contacts, and Time Billed (0). The "Messages" tab is active and contains a section titled "KB Content Fields" which is highlighted with a red box. This section includes:

- KB Submitter**: [Empty]
- KB Content Provider**: [Empty]
- KB Action**: [No Value]

Below the "KB Content Fields" section is a toolbar with icons for Send On Save, Smart Assistant, Search Knowledgebase, Standard Text, and Undo. Below the toolbar is a list of messages with columns for Add, View, and Sort. The first message is:

- Customer**: By Web Form
- By**: Ray Jones, 08/17/2007 02:00 PM
- This feedback is about:** [http://kolpin.mtvm.lan/cqi-bin/kolpin.cfq/php/enduser/popup\\_adp.php?p\\_faqid=1](http://kolpin.mtvm.lan/cqi-bin/kolpin.cfq/php/enduser/popup_adp.php?p_faqid=1)
- Text**: I sure would like to see a picture of Bob.

**Custom incident workspace**

**Only KB staff have access to and can edit these fields**

## Content Review and Approval via Workspaces

- In 8.x, use custom workspaces to allow specific staff the ability to edit specific answer review custom fields.

Summary\* Gas mileage Status\* Public Language\* English

Assigned KB Enginee Jenny Access Level Everyone

Content **Approval** Products/Categories Tasks (0) Details Attachments

**Review and Approval Fields**

Tech Support Approve No

TS Review Comments The second paragraph isn't complete enough. Jim can provide you with more specific content to publish.

Legal Approve [No Value]

Legal Review Comment

**This tab only  
editable  
by managers.**

## Content Review and Approval via Incident

- Create an incident and copy the content in a note or include as an attachment.
- Obtain manager's approval via incident thread which is not editable once committed to the thread.
- Include incident reference number in answer (custom field).

## Analyzing Session Activity

- Include search count and answers viewed in incident report
- See which incidents had the most session activity prior to submittal
- Begin with small time frame of data from the replication database  
For high traffic sites, consider looking at a half hour of data.
- Determine which rows are of interest and add filters to the report

# Incidents with Counts of Searches and Answers Viewed

	Date Created	Reference #	Session ID	▼ # Ans	# Searches	RightNow Version	Subject
1	08/02/2007 0	070802-0000	9_xlP8Ii	11	7	8.1.0.2-b424h-mysql	Analytics - scheduled report format is only html and not Excel -
2	08/02/2007 1	070802-0001	EzzCF9Ii	10	3	7.5.5.0-b415h-mysql	Enhancement: Allow more customization of email messages/fixed wid
3	08/02/2007 1	070802-0001	EzzCF9Ii	10	3	7.5.5.0-b415h-mysql	Chat Errors
4	07/31/2007 1	070731-0003	P_ye21Ii	9	4	7.5.5.0-b415h-mysql	Answer category management - interface selection bug
5	07/30/2007 1	070730-0001	-U4AxVHi	9	10	7.5.6.0-b440h-mysql	Customizable menu character limit
6	08/01/2007 0	070801-0002	1bku65Ii	7	0	7.5.5.0-b415h-mysql	Release 8.2
7	08/01/2007 0	070801-0000	Fs2Wr3Ii	7	17	8.1.0.1-b414h-mysql	Retaining Staff Account Usernames & Passwords
8	07/31/2007 1	070731-0002	HJozJ-Hi	7	3	7.5.6.0-b440h-mysql	
9	08/03/2007 1	070803-0001	j*T5meIi	6	4	8.1.0.2-b440h-mysql	

Column Definition

Heading\*   Use predefined

Description  
Count of p\_faqid hits for the session

Available Columns/Functions:  Current Dataset  All Tables  Functions  Variables

Expression:  
`sum(if(clicktrack.parm='p_faqid', 1, 0))`

OK Cancel

Column Definition

Heading\*   Use predefined heading

Description  
Count of searches per session

Available Columns/Functions:  Current Dataset  All Tables  Functions  Variables

Expression:  
`sum(if(clicktrack.parm='p_search_text', 1, 0))`

OK Cancel

# Filtered Session Data

- Filters on session data
- Logical expression

**Answer Effectiveness**

Home Report **Display** Data

Auto Format Display Options Section Visibility Zoom

Display

**Search Criteria**

Type	Name	Operator	Value
Report Filter	parm1	LIKE	p_faqid
Report Filter	parm2	LIKE	p_search_text
Report Filter	parm3	LIKE	PATH_INFO
Report Filter	val1	not like	/enduser/cls%
Report Filter	val2	not like	/enduser/email%
Report Filter	val3	not like	/enduser/help%
Report Filter	val4	not like	/enduser/msg%
Report Filter	val5	not like	/enduser/my%
Report Filter	val6	not like	/enduser/notif%
Report Filter	val7	not like	/enduser/popup%
Report Filter	val8	not like	/enduser/prnt%
Report Filter	val9	not like	/enduser/std_alp%
Report Filter	interface	in list	rightnow
Report Filter	Date Created	between	07/28/2007 02:00 PM to 07/29/2007 03:00 PM

**Edit Logical Expression**

AND

- exc\_cls
- exc\_email
- exc\_help
- exc\_msg
- exc\_mystuff
- exc\_notif
- exc\_popup
- exc\_print
- exc\_std\_alp
- interface
- date range

OR

- p\_faqid
- p\_search\_text
- path\_info

**Actions**

- Add Filter
- Add OR Node
- Negate Expression
- Delete node
- View Text Definition

OK

## Session data examples

Session ID	Function	Contact ID	# Searches	# Ans Viewed	# Hits to AAQ	# Submitted
fnEAWRHi	07/29/2007 07:07 PM	1077511394		44		
49PcW6Ii	08/02/2007 12:27 AM	1077269446	8	20		
b4U*FFi	08/03/2007 04:15 PM	1077511737		18		
F9RGtZHi	07/31/2007 05:27 AM	1077528023	16	17		
FWoR4Ii	08/01/2007 12:43 PM	245377	17	17		
N8yD3dIi	08/03/2007 04:25 AM	1077353724	7	17		
De4**ZHi	07/31/2007 07:58 AM	1077236165	3	16		
GFD5m6Ii	08/01/2007 09:56 PM	1077281632	24	15		
z46taWHi	07/30/2007 02:26 PM	791	5	15		
eI75B2Hi	07/31/2007 06:07 AM	1077515354	14	14		
XNQHh7Ii	08/02/2007 03:56 AM	1077250859	19			
FMzvvTHi	07/30/2007 02:18 AM	1077494190	14			
zP6NrTHi	07/30/2007 02:13 AM	1077496920	3			
1yhej4Ii	08/01/2007 12:34 PM	1077523353	16			
JaxdP4Ii	08/01/2007 02:51 PM	1077355221	18			
4E5sE_Hi	07/31/2007 03:37 PM	1077491867	4			
ihT63aIi	08/02/2007 02:44 PM	1077387474	8			
JU5xr-Hi	07/31/2007 09:51 AM	1077528023	15			
PX4Mn4Ii	08/01/2007 12:53 PM	1077511762	11			
9_xlP8Ii	08/02/2007 09:05 AM	1077174116	7			
YfUlb-Hi	07/31/2007 08:42 AM	1077272271	6			
h4E-M3Ii	08/01/2007 10:08 AM	1077388533	15			

Session ID	Parameter	Value	Date Created
go5Mm3Ii	p_search_text	end user style	08/01/2007 08:16 AM
go5Mm3Ii	p_search_text	end user pages	08/01/2007 08:17 AM
go5Mm3Ii	p_search_text	ask a question look	08/01/2007 08:17 AM
go5Mm3Ii	PATH_INFO	/enduser/std_adp.php	08/01/2007 08:17 AM
go5Mm3Ii	p_faqid	545	08/01/2007 08:17 AM
go5Mm3Ii	p_search_text	changing colors	08/01/2007 08:19 AM
go5Mm3Ii	PATH_INFO	/enduser/std_adp.php	08/01/2007 08:19 AM
go5Mm3Ii	p_faqid	672	08/01/2007 08:19 AM
go5Mm3Ii	PATH_INFO	/enduser/std_adp.php	08/01/2007 08:20 AM
go5Mm3Ii	p_faqid	635	08/01/2007 08:20 AM
go5Mm3Ii	p_search_text	html colors	08/01/2007 08:21 AM
go5Mm3Ii	PATH_INFO	/enduser/std_adp.php	08/01/2007 08:21 AM
go5Mm3Ii	p_faqid	111	08/01/2007 08:21 AM
go5Mm3Ii	PATH_INFO	/enduser/std_adp.php	08/01/2007 08:23 AM
go5Mm3Ii	p_faqid	672	08/01/2007 08:23 AM
go5Mm3Ii	p_faqid	624	08/01/2007 08:23 AM
go5Mm3Ii	PATH_INFO	/enduser/std_adp.php	08/01/2007 08:25 AM
go5Mm3Ii	p_faqid	672	08/01/2007 08:25 AM
go5Mm3Ii	p_faqid	624	08/01/2007 08:46 AM
go5Mm3Ii	p_faqid	635	08/01/2007 08:47 AM

## Notifying Staff of New Answers

- Custom date field for Date Published
- Set up report with data exception to use in alert, i.e. Answer ID > 0
- Schedule report to send when alert is met

### PK - Answer Published Last Week

Answer ID	Summary	Date Published	Score
2506	Configuring transactional surveys in 8.x	08/02/2007	11
2389	Broadcasting a notification to other staff members	08/01/2007	5
2194	Requiring custom fields in 8.x	07/31/2007	9
2169	Customizing reports and search results used in an 8.x workspace	07/31/2007	7
2158	8.0 login error: The remote server returned an error: (403) forbidden	07/30/2007	32

## Answer Visibility Field

- Answers.admin\_vis field can be added as a filter to answer reports
- If answer is assigned to at least one product and category with administration visibility enabled for the interface, the answers.admin\_vis field is Yes.
- Allows you to control whether answers from other interfaces are returned in a report

# Answer Visibility Field - Screenshots

Search

Filters

answers.admin\_vis

- (Select All)
- No Value
- Yes
- No

Answer ID	Summary	Product
1	Who is Bob?	Product 1
1	Who is Bob?	Product 2
2	Bob's 100-mile leash	Product 1
5	Gas mileage	Product 1

Report was run on interface 1. Each answer is saved with at least one product that is admin visible for interface 1 and at least one category that is admin visible for interface 1

Search

Filters

answers.admin\_vis

- (Select All)
- No Value
- Yes
- No

Answer ID	Summary	Product
3	INTERNAL: Answer with Session Data	Product 4
10	PowerPoint slides for User Conference	Product 5

Report was run on interface 1, but shows answers with products and categories that are not visible to interface 1 (products and categories are visible to interface 2)

# Relationships Between Answers

The screenshot shows the 'Relationships' section of a software interface. It is divided into three main sections: 'Siblings Answers', 'Manually Related Answers', and 'Learned Links'. The 'Siblings Answers' section contains a table with one entry: Answer ID 4, Summary 'Wer ist Bob?', Language 'German', Status 'Public', Assigned 'Hans Schmidt', and Date Updated '08/17/2007 01:03 PM'. The 'Manually Related Answers' section has an 'Add' button circled in red and a message 'There are no items to show in this view.' The 'Learned Links' section contains a table with three entries: Answer ID 2 (Summary 'Bob's 100-mile leash', Blocked 'No'), Answer ID 5 (Summary 'Gas mileage', Blocked 'No'), and Answer ID 6 (Summary 'Where can Bob go within his 100-mile leash?', Blocked 'No'). The 'Promote' button in the 'Learned Links' section is also circled in red.

Answer ID	Summary	Language	Status	Assigned	Date Updated	Action
4	Wer ist Bob?	German	Public	Hans Schmidt	08/17/2007 01:03 PM	<a href="#">Edit</a>

  

Answer ID	Summary	Action
There are no items to show in this view.		

  

Answer ID	Summary	Blocked	Action
2	Bob's 100-mile leash	No	<a href="#">Edit</a>
5	Gas mileage	No	<a href="#">Edit</a>
6	Where can Bob go within his 100-mile leash?	No	<a href="#">Edit</a>

Siblings Answers section must be enabled from workspace property

Can manually relate answers together