



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

**RIGHT**  
**NOW**  
TECHNOLOGIES  
SUMMIT 07

## Advanced Workspace Design

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## Panel Introduction

- Gretchen Dickie
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- Ken Bevins
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## Session Agenda

- Workspace Introduction
- Workspace Administration
- Workspace Designer
- Best Practices
- Tips and Tricks
- Q & A / Discussion

## Workspace Introduction

- RightNow 8 offers a more consistent, intuitive interface for working with all types of records – as a result, work that was previously performed on separate consoles (Support, Sales, etc.) is now all conducted on the RightNow Console
- Workspaces define the content and configuration of the RightNow Console when users view, add, and edit records
- 15 predefined standard Workspaces, which were designed to address typical business needs, are available in the default configuration (depending on which RightNow modules are enabled)
- Custom Workspaces allow complete flexibility to customize what users see in the RightNow Console – this allows the creation of a streamlined user interface that is specifically designed to align with staff member responsibilities

# Workspace Administration

- Profile requirements for Workspace administrators:
  - Create/Edit Workspaces: Profiles > Common tab > Workspace Designer
  - Associate Workspaces with profiles: Profiles > Common tab > Staff Management > Profiles
- Each profile is assigned a Workspace for each record type – Workspaces can be shared across profiles
- When a pre-version 8 site is upgraded to version 8, profiles are associated with Workspaces that are created during the upgrade process based on the configuration of the pre-version 8 RightNow site
- When creating a new profile, if a Workspace isn't specified for a record type the standard Workspace is assigned by default when the profile is saved

# Workspace Designer

- Toolbar Buttons:
  - Show Outline – enables underlying table grid
  - Advanced – toggles between basic and advanced modes, which offers additional controls and properties
  - Options – use to choose Spell Check option and enter Workspace notes
- Info button – drag and drop fields to the button to configure
- Design Space:
  - Table grid – the underlying grid of any Workspace is a table, which is automatically created on a blank Workspace when the first field or control is added

## Workspace Designer (continued)

- Field default values – certain fields have the 'Use Default Value From Workspace' property that can be used to set a default value on the Workspace
- Selection Menu – displays a hierarchical list of all objects on the Workspace

## Best Practices

- Limit Workspace administrative access as much as possible
- Maintain backup copies of all active Workspaces
- Maintain a test staff account and profile that can be used to verify workspace configuration / modifications
- If feasible, copy and modify the available standard Workspaces rather than create Workspaces from scratch

## Tips and Tricks

- Enable the report 'Delay Report Execution' property on tabs if possible to improve record load time
- Take advantage of the Selection menu when designing and editing Workspaces
- Utilize the Show Outline button when positioning Workspace elements on the content pane
- The 'Field Name' property displays the field's underlying database Column Name – useful if the field name has been changed on the Workspace or through Message Base modifications
- Make use of the Spacer Control when positioning and sizing elements

## Q & A / Discussion

- Questions?
- Ideas?