

Advanced Answer Console Design: Giving Your Customers What They Want

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Agenda

- Organizing Your Answers
 - Use of views
 - o By product, category, assigned, rule states
- Facilitating the Approval Process
 - Workflow (rules and routing)
- Q&A



Views

- Ways to hide your data
 - Filters: fixed, run-time selectable and node
- Determining output
 - Usage of functions
- Layers of data
 - Drill-down views
 - Grouping and sorting
 - o By assigned
 - o By category
 - o By rule states
 - o Other... (i.e. custom fields)



RightNow Answer Console

DEMO



Fixed and Run-time View Filters

Answer Console View - Edit

Name: Answers Copy Owner: Willie Eide

Data Set Output Permissions

Table Instances

- answers
 - accounts

Fixed Filters (always applied and cannot be changed at run-time)

Name	Expression 1	Operator	Expression 2
name	accounts.acct_id	in list	Logged In

Fixed Filters cannot be changed

Run-time Selectable Filters (values can be changed at run-time)

Name	Expression	Oper...	Value	Prompt
lang_id	answers.lang_id	in list	Any	
access_id	answers.access...	in list	Any	
status_id	answers.status_id	in list	Any	
assgn_a...	answers.assgn_...	in list	Any	
search_nl	answers.search...	=		
search_fnl	answers.search...	=		
search_ex	answers.search...	=		
search_c...	answers.search...	=		

Logical Expression

Initial Search
 Auto Refresh

Run-time filters have defaults and can be altered during a search



Node View Filter

Answer Console View - Edit

Name: Answers in States Owner: Willie Eide

Data Set Output Permissions

Output Levels

- Levels
 - Top Category
 - Output
 - Result Grouping
 - Result Ordering
 - Proposed State**
 - Output
 - Result Grouping
 - Result Ordering
 - WIP State
 - Output
 - Result Grouping
 - Result Ordering
 - Approval State
 - Output
 - Result Grouping
 - Result Ordering
 - Review State
 - Output
 - Result Grouping
 - Result Ordering
 - Published
 - Output
 - Result Grouping
 - Result Ordering

Level Name: Proposed State

Drill-down filter: answers.map_cat_lv1

Drill-down link: sum(if (answers.rule_state=3, 1, 0))

Node Filters

<input type="checkbox"/>	Name	Expression 1	Operator	$f_{(...)}$	Expression 2	∩ /
<input checked="" type="checkbox"/>	state	answers.rule_state	in list	<input type="checkbox"/>	Proposed	

Logical Expression

Node filters provide levels of data segmentation



Examples of Options and Functions

Answer Console View - Edit

Name: Answers in States Owner: Willie Eide

Data Set Output Permissions

Output Levels

- Levels
 - Top Category
 - Output
 - Result Grouping
 - Result Ordering
 - Proposed State
 - Output
 - Result Grouping
 - Result Ordering
 - WIP State
 - Output
 - Result Grouping
 - Result Ordering
 - Approval State
 - Output
 - Result Grouping
 - Result Ordering
 - Review State
 - Output
 - Result Grouping
 - Result Ordering
 - Published
 - Output
 - Result Grouping
 - Result Ordering

Output Columns

Column/Function	Colu...	Data Len...	Column Heading	▼ / ▲
answers.map_cat_lv1	<input checked="" type="checkbox"/> 150	All		▼
sum(if (answers.rule_state=3, 1, 0))	<input checked="" type="checkbox"/> 75	N/A	Proposed	▼ ▲
sum(if (answers.rule_state=4, 1, 0))	<input checked="" type="checkbox"/> 125	N/A	Work In Progress	▼ ▲
sum(if (answers.rule_state=5, 1, 0))	<input checked="" type="checkbox"/> 75	N/A	Approval	▼ ▲
sum(if (answers.rule_state=6, 1, 0))	<input checked="" type="checkbox"/> 75	N/A	Review	▼ ▲
sum(if (answers.rule_state=7, 1, 0))	<input checked="" type="checkbox"/> 75	N/A	Published	▼ ▲
count(answers.a_id)	<input checked="" type="checkbox"/> 50	N/A	Total	▲

Color Expression

Usage of functions

Multiple drill-down options



Example of Drill-Down View

Name: Answers by Category

Data Set | **Output** | Permissions

Output Levels

- Levels
 - Category
 - Output
 - Result Grouping
 - Result Ordering
 - Answers
 - Output
 - Result Grouping
 - Result Ordering

Output Columns

Column/Function	Column VM...
answers.a_id	<input checked="" type="checkbox"/> 13 %
answers.summary	<input checked="" type="checkbox"/> 62 %
answers.status_id	<input checked="" type="checkbox"/> 10 %
answers.solved_count	<input checked="" type="checkbox"/> 15 %

Answer Console

Quick Search > Answers by Category Refresh Search New Edit Delete Print

Viewing Answers by Category: Top Level Groups: 10 (containing 252 records)

	Category	Number of Answers
1	General	29
2	Account and Billing	32
3	DSL and Internet Services	26
4	How Do I...?	28
5	Long Distance	22
6	Troubleshooting	26
7	Request Repair	20
8	Manage My Account Online	22
9	Product Guides	22
10	Voice Messaging	25

Answer Console

Quick Search > Answers by Category Refresh Search New Edit Delete Print

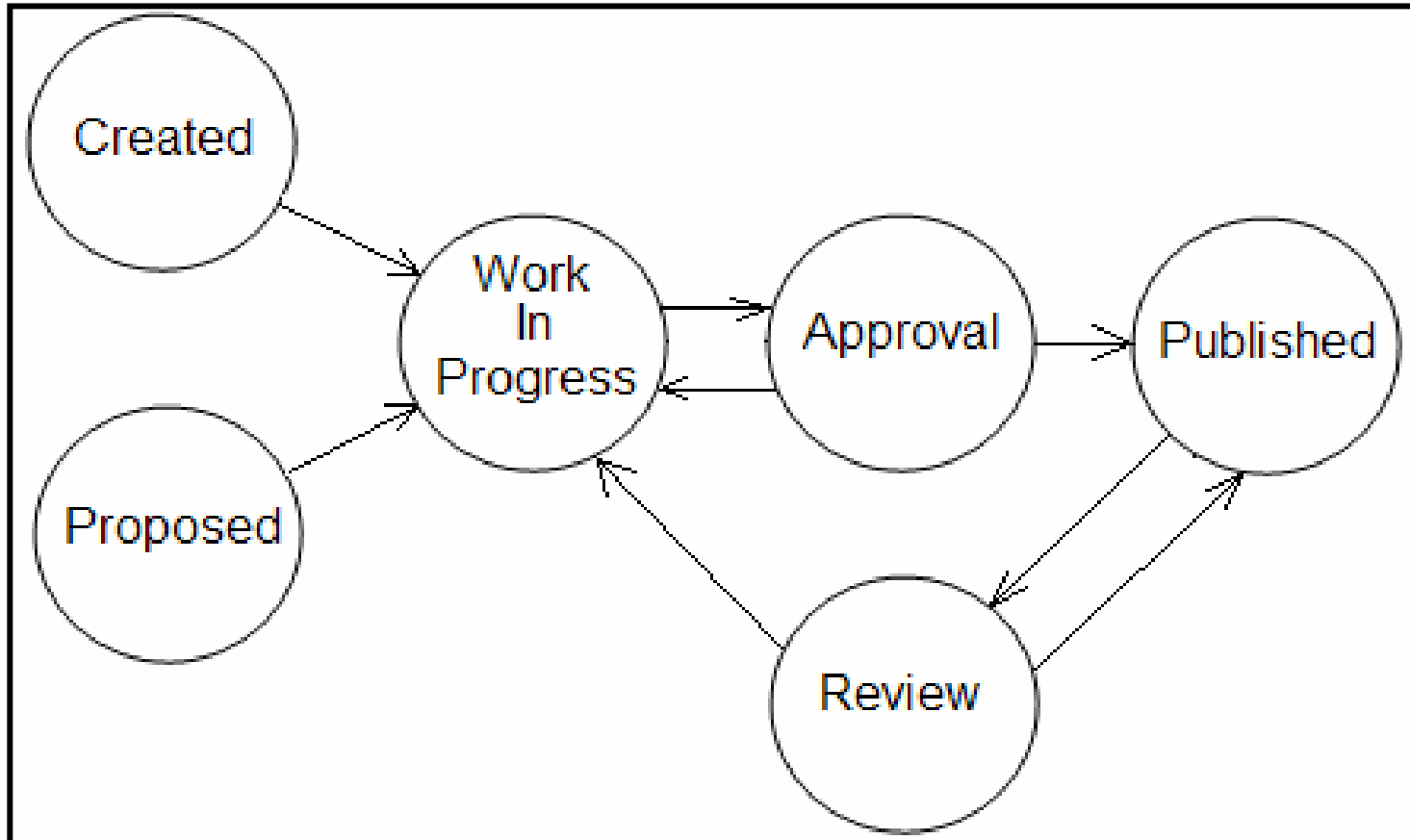
Viewing Answers by Category: Top Level > How Do I... Records Found: 28

	Answer ID	Summary	Status	Score
1	120	Modem	Public	150
2	114	Type of ADSL Modem	Public	58
3	69	Call Waiting Interactive Tutorial	Review	42
4	145	Smartguide Sample	Public	35
5	116	Questions about ONE-BILL	Public	31
6	115	Questions about Long Distance	Public	28
7	146	Connection Problem - Browsing and Email do NOT work	Public	26
8	117	Questions about Other Features	Public	22
9	119	Questions about Call Blocking	Public	19



Workflow

- Use of rule states to facilitate workflow of an answer from conception to completion



RightNow Answer Console

DEMO



Rules Facilitate Approval Process

Management & Configuration (uiteam)

Browse Answer Rules

Name: Notes:

Save Cancel

From State	To State	Function Name	Called From
Created (Initial state)	Proposed Work In Progress	Clear All Approvals	Approval Review Published
Proposed	Work In Progress		
Work In Progress	Approval		
Approval	Work In Progress Published		
Review	Approval		
Published	Work In Progress Review		

Activated Account Edited Account Archived Account
09/12/2005 10:44 PM Willie Eide 09/12/2005 10:44 PM Willie Eide

Restore

Done User: Willie Eide 11:28 PM

Use descriptive rules within each state

Note the textual representation of the state to state diagram



The Power of Rules

View Answer Rule

Viewing Rule in State: Approval

Rule Name: Notes:

If

- Answers.Marketing Approved equals Yes No None Delete Condition
- Answers.Legal Approved equals Yes No None Delete Condition
- Answers.Management Approved equals Yes No None Delete Condition

Add condition based on:

Logical Expression (& = and, | = or; e.g. 1 & (2 | 3))

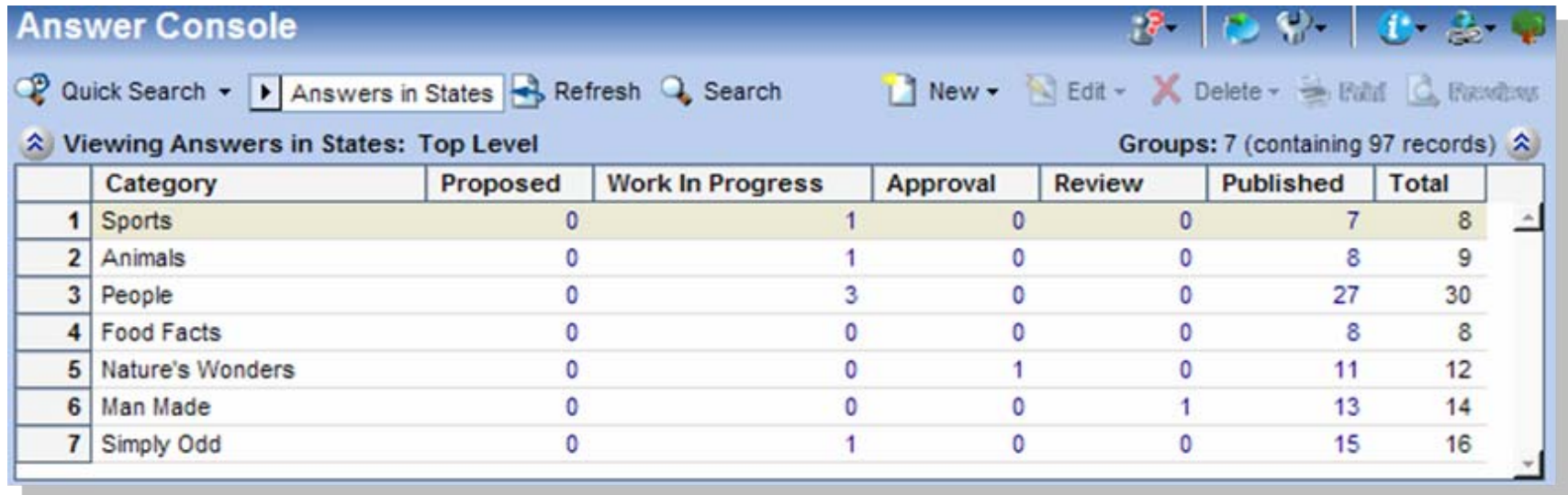
Then

- Set Custom Field What to do next
equal to Delete Action
- Call Function
 Delete Action
- Send Escalation Notification
 to assignee

with subject line: Delete Action
- Transition State and stop
 Delete Action



A View Combining Rules and Approval Process Flow



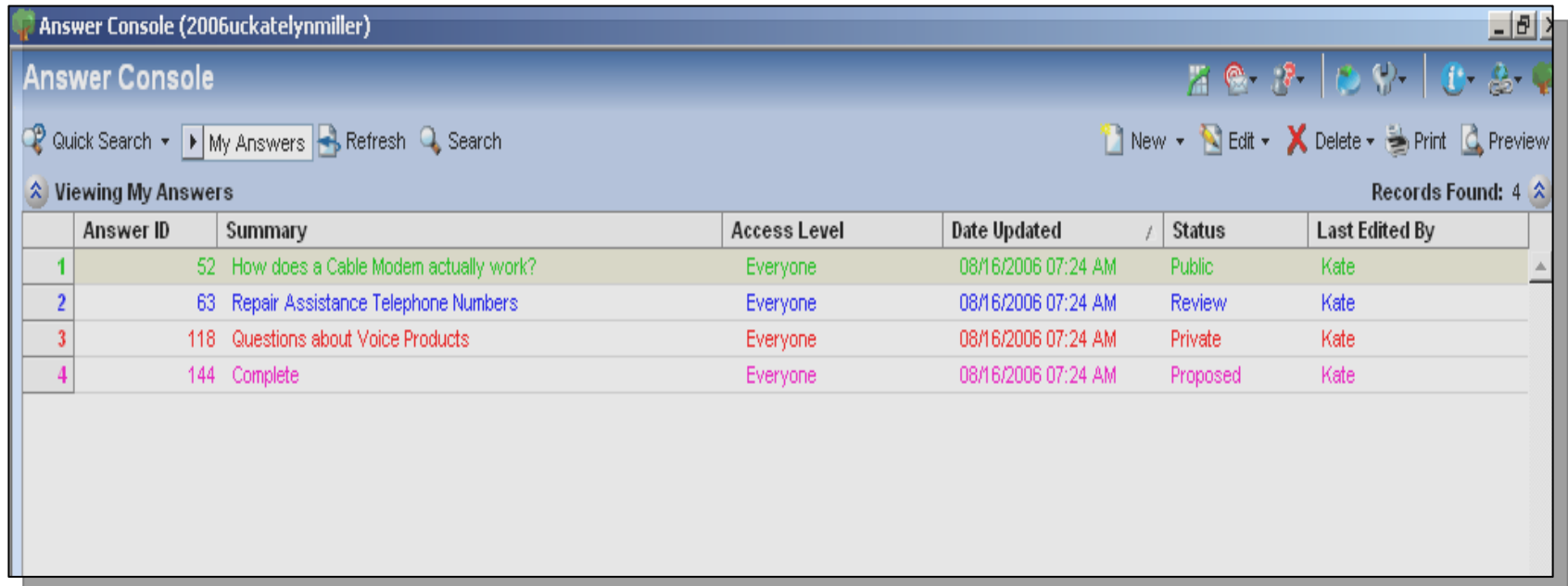
The screenshot shows a software interface titled "Answer Console". At the top, there are navigation icons and a search bar containing "Answers in States". Below the search bar, there are action buttons: "New", "Edit", "Delete", "Print", and "Refresh". The main content area is titled "Viewing Answers in States: Top Level" and shows a table with 7 groups containing 97 records. The table has columns for Category, Proposed, Work In Progress, Approval, Review, Published, and Total. The rows represent different categories: Sports, Animals, People, Food Facts, Nature's Wonders, Man Made, and Simply Odd.

	Category	Proposed	Work In Progress	Approval	Review	Published	Total
1	Sports	0	1	0	0	7	8
2	Animals	0	1	0	0	8	9
3	People	0	3	0	0	27	30
4	Food Facts	0	0	0	0	8	8
5	Nature's Wonders	0	0	1	0	11	12
6	Man Made	0	0	0	1	13	14
7	Simply Odd	0	1	0	0	15	16

This advanced view shows answers from various categories and the states by which those answers are currently in. These states and the flow of approval is handled by workflow rules.



My Answers View



The screenshot shows a web application window titled "Answer Console (2006uckatelynmiller)". The interface includes a search bar with "My Answers" selected, a refresh button, and a search icon. On the right, there are icons for navigation and a toolbar with "New", "Edit", "Delete", "Print", and "Preview" buttons. Below the toolbar, it says "Viewing My Answers" and "Records Found: 4". The main content is a table with the following data:


	Answer ID	Summary	Access Level	Date Updated	Status	Last Edited By
1	52	How does a Cable Modem actually work?	Everyone	08/16/2006 07:24 AM	Public	Kate
2	63	Repair Assistance Telephone Numbers	Everyone	08/16/2006 07:24 AM	Review	Kate
3	118	Questions about Voice Products	Everyone	08/16/2006 07:24 AM	Private	Kate
4	144	Complete	Everyone	08/16/2006 07:24 AM	Proposed	Kate

My Answers View leverages fixed filters and color expressions for each Answer Status.



Internal Content for CSRs

- Answer Status – Internal CSR
- Answer Access Level – Internal CSR Access

Answer ID 
159

• **Status**

Internal CSR

• **Language**

English (US)

Access Level

Gold

Internal

Dealer

Riverstar

Internal CSR Access

Search Answers View

- Fixed Filter – Public and Internal CSR Answer Statuses

Management & Configuration (2006uckatelynmiller)

Support Search Answers View - Edit

Owner: Administrator

Data Set Output

Table Instances

- answers

Fixed Filters (always applied and cannot be changed at run-time)

Name	Expression 1	Operator	f(x)	Expression 2	
status	answers.status_id	in list	<input type="checkbox"/>	Public, Internal CSR	

Run-time Selectable Filters (user can change values for these filters at run-time)

Name	Expression	Operator	Value	Prompt	
prod	answers.map_prod_hierarchy	in list	Any		▼
cat	answers.map_cat_hierarchy	in list	Any		▼▲
updated	answers.updated	between	Any to Any		▼▲
access	answers.access_id	in list	User Access		▼▲
search_nl	answers.search_nl	=			▼▲
search_ex	answers.search_ex	=			▼▲
search_fnl	answers.search_fnl	=			▼▲
search_cpx	answers.search_cpx	=			▲

Logical Expression

status & prod & cat & updated & access & (search_nl | search_ex | search_fnl | search_cpx)

Auto Refresh

Save Cancel



Color Expression

Management & Configuration (2006uckatelynmiller)

Support Search Answers View - Edit

Owner: Administrator

Data Set Output

Output Levels

- Levels
 - Support Answers
 - Output
 - Result Grouping
 - Result Ordering

Output Columns

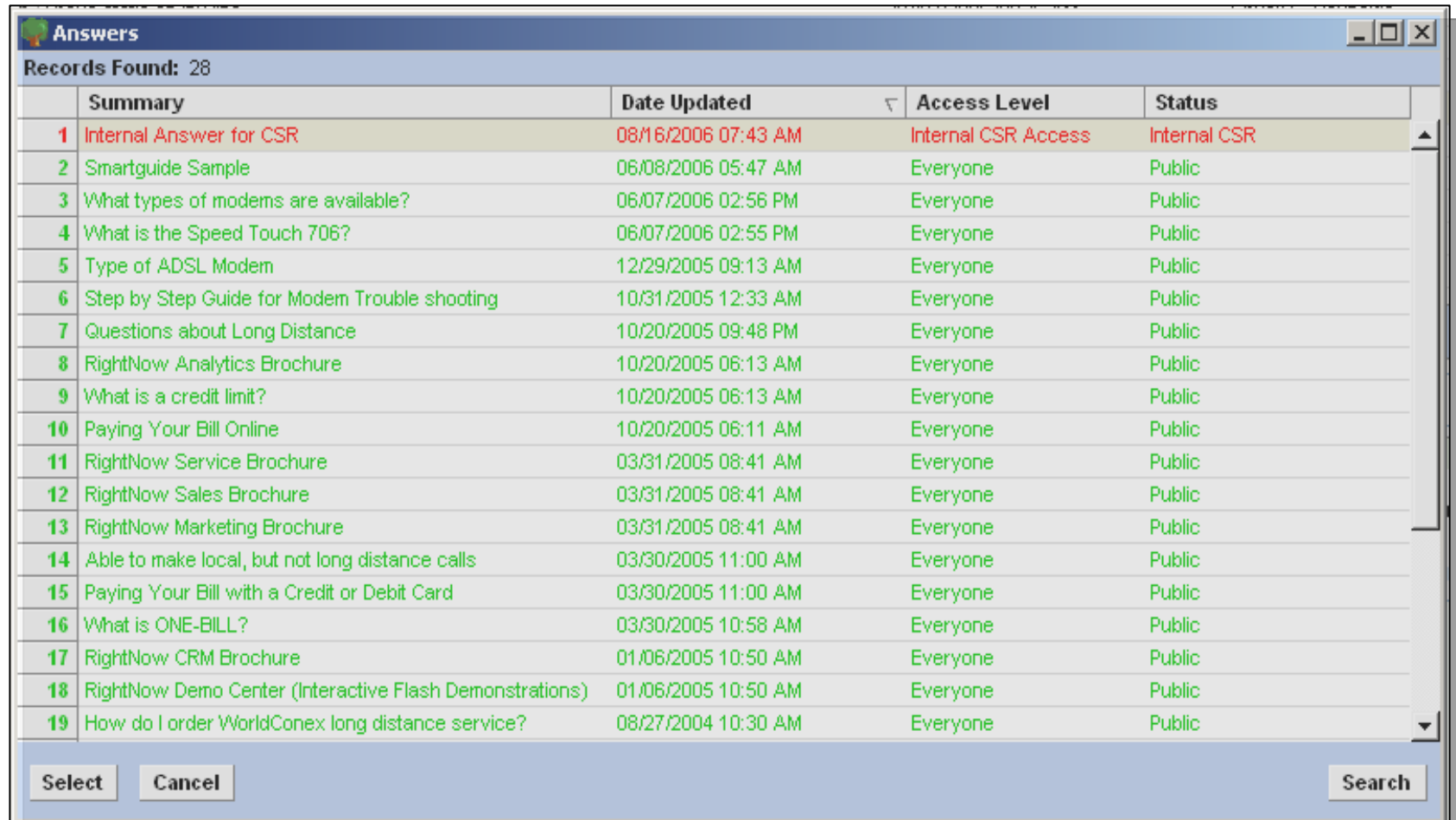
Column/Function	Column Width	Data Length	Column Heading	
answers.summary	<input checked="" type="checkbox"/>	40 %	120	▼
answers.updated	<input checked="" type="checkbox"/>	22 %	N/A	▼▲
answers.access_id	<input checked="" type="checkbox"/>	18 %	25	▼▲
answers.status_id	<input checked="" type="checkbox"/>	20 %	All	▲

Color Expression

```
decode(answers.status_id, 'Internal CSR', 'Red', 'Public', '00CC00', 'default')
```



CSR Experience



Answers

Records Found: 28

	Summary	Date Updated	Access Level	Status
1	Internal Answer for CSR	08/16/2006 07:43 AM	Internal CSR Access	Internal CSR
2	Smartguide Sample	06/08/2006 05:47 AM	Everyone	Public
3	What types of modems are available?	06/07/2006 02:56 PM	Everyone	Public
4	What is the Speed Touch 706?	06/07/2006 02:55 PM	Everyone	Public
5	Type of ADSL Modem	12/29/2005 09:13 AM	Everyone	Public
6	Step by Step Guide for Modem Trouble shooting	10/31/2005 12:33 AM	Everyone	Public
7	Questions about Long Distance	10/20/2005 09:48 PM	Everyone	Public
8	RightNow Analytics Brochure	10/20/2005 06:13 AM	Everyone	Public
9	What is a credit limit?	10/20/2005 06:13 AM	Everyone	Public
10	Paying Your Bill Online	10/20/2005 06:11 AM	Everyone	Public
11	RightNow Service Brochure	03/31/2005 08:41 AM	Everyone	Public
12	RightNow Sales Brochure	03/31/2005 08:41 AM	Everyone	Public
13	RightNow Marketing Brochure	03/31/2005 08:41 AM	Everyone	Public
14	Able to make local, but not long distance calls	03/30/2005 11:00 AM	Everyone	Public
15	Paying Your Bill with a Credit or Debit Card	03/30/2005 11:00 AM	Everyone	Public
16	What is ONE-BILL?	03/30/2005 10:58 AM	Everyone	Public
17	RightNow CRM Brochure	01/06/2005 10:50 AM	Everyone	Public
18	RightNow Demo Center (Interactive Flash Demonstrations)	01/06/2005 10:50 AM	Everyone	Public
19	How do I order WorldConex long distance service?	08/27/2004 10:30 AM	Everyone	Public

Select Cancel Search



Additional Features in Version 7.5

- Product Linking
 - Ability to link products to categories
- Answer Management
 - Access level enhancements
 - SmartMerge
 - Conditional sections



RightNow Answer Console

DEMO



Linking Products to Categories

Product Linking

Configure Category Linking Configure Disposition Linking

Product

- Guinness Book (7 Links)
- Puzzle Galore (6 Links)
- Guinness Fact Sheets (6 Links)
- Board Games (6 Links)

Category

- Sports (6 Answers Linked)
- Animals (7 Answers Linked)
- People (27 Answers Linked)
- Food Facts (6 Answers Linked)
- Nature's Wonders (10 Answers Linked)
- Man Made (12 Answers Linked)
- Simply Odd (14 Answers Linked)
- Users Manual
- Order Form
- Merchandising
- Retailers / Resellers
- Online Gaming
- Registration
- Subscription Services
- Online Community
- Calendar Orders
- Helpful Hints
- Printable Puzzles
- Accessory Kits
- Posters

Disposition

- Online Assistance
- Missing Pieces
- Order Processing
- Internal Help
- Partner Services

Product Linking on Answer Console

The screenshot displays the 'Answer Console' application window. At the top, there is a menu bar with options like 'New', 'Edit', 'Delete', 'Print', and 'Preview'. Below the menu bar, a search bar and a category filter are visible. The main area shows a table of answers with columns for 'Answer ID', 'Summary', 'Status', and 'Score'. The table lists 12 records, with the 10th record, 'Heaviest Pumpkin', highlighted. Below the table, there are tabs for 'Answer Text', 'Details', and 'Meta-Answer'. The 'Meta-Answer' tab is active, showing a 'Summary' field with the text 'Heaviest Pumpkin'. To the left of the summary, there are two tree views: 'Product' and 'Category'. The 'Product' tree has 'Guinness Book (7 Links)' selected. The 'Category' tree has 'Food Facts', 'Nature's Wonders', and 'Simply Odd' selected. Below these trees is a 'Notes' field. At the bottom, there are buttons for 'Save', 'Cancel', 'Notify Subscribers', 'Spelling', and 'Print'. The status bar at the very bottom shows 'User: Willie Eide' and the time '11:43 PM'.

Answer ID	Summary	Status	Score
4	31 World's Hottest Spice	Public	6
5	27 Deepest Point in the Ocean	Private	6
6	17 Most Lightning Strikes Survived	Public	5
7	24 Country With the Most Tornadoes	Public	5
8	54 Troubleshooting your wireless router	Public	4
9	52 This is Gold	Public	3
10	30 Heaviest Pumpkin	Public	3
11	53 This is Silver	Public	2
12	26 Greatest Annual Rainfall	Public	2

Answer ID: 30
Status: Public
Language: English (US)
Access Level: Everyone
Assigned: Development, Mike Myer
Review On: [Dropdown]
Publish On: [Dropdown]
Display Position: Historical Usefulness

Product Links:
 Guinness Book (7 Links)
 Puzzle Galore (6 Links)
 Guinness Fact Sheets (6 Links)
 Board Games (6 Links)

Category Links:
 Sports
 Animals
 People
 Food Facts
 Nature's Wonders
 Man Made
 Simply Odd



Answer Management Enhancements

The screenshot displays the 'Answer Console' application window. At the top, there is a menu bar with options like 'New', 'Edit', 'Delete', 'Print', and 'Preview'. Below the menu is a search bar and a table of search results. The table has columns for 'Answer ID', 'Summary', 'Language', 'Access Lev', 'Status', 'Assigned', and 'Date Updated'. One record is visible with ID 51 and summary 'Multiple Access levels answ'. Below the table, the 'Answer ID 51' details are shown. On the left, there are dropdown menus for 'Status' (Public), 'Language' (English (US)), and 'Access Level' (Gold, Silver, Help, Everyone). The 'Access Level' dropdown is highlighted. In the center, there is a 'Smart Merge...' button. On the right, the 'Answer Text' editor shows a rich text editor with a toolbar and a text area containing conditional sections. The text area includes: 'This is the top common area in this answer', a section titled 'Access Level Conditional' with the text 'This is the Gold Access section', another 'Access Level Conditional' section with 'This is the Silver Access section', and 'Finally, this is the bottom common area in this answer'. At the bottom of the window, there are buttons for 'Save', 'Cancel', 'Notify Subscribers', 'Spelling', and 'Print'. The status bar at the very bottom shows 'User: Willie Eide' and the time '11:48 PM'.

Answer ID	Summary	Language	Access Lev	Status	Assigned	Date Updated
51	Multiple Access levels answ	English (US)	Everyone,Gold Public		Willie Eide	09/12/2005 02:33 PM

Multiple access levels

SmartMerge

Conditional sections



Upcoming RightNow 8 Features

- New HTML editor
 - Utilizing a newer HTML editor (Netrix)
- New Answer Types
 - URL Answer
 - File Attachment Answer
- Answer Layouts
 - User can design the look and feel of their answer editor
- Simplified Meta Answer Management
 - New term: “Sibling Answers”
 - Ability to view all sibling answers from within one answer
- Improved Answer Linking
 - Added ability to manually relate answers
 - Added ability to block / promote the enduser learned links
- Added Answer Task functionality
 - Users can now create and share tasks across the entire product



Best Practices

Define Publishing Process

Define Corporate Style Guide for Content

Develop Views to Manage Content

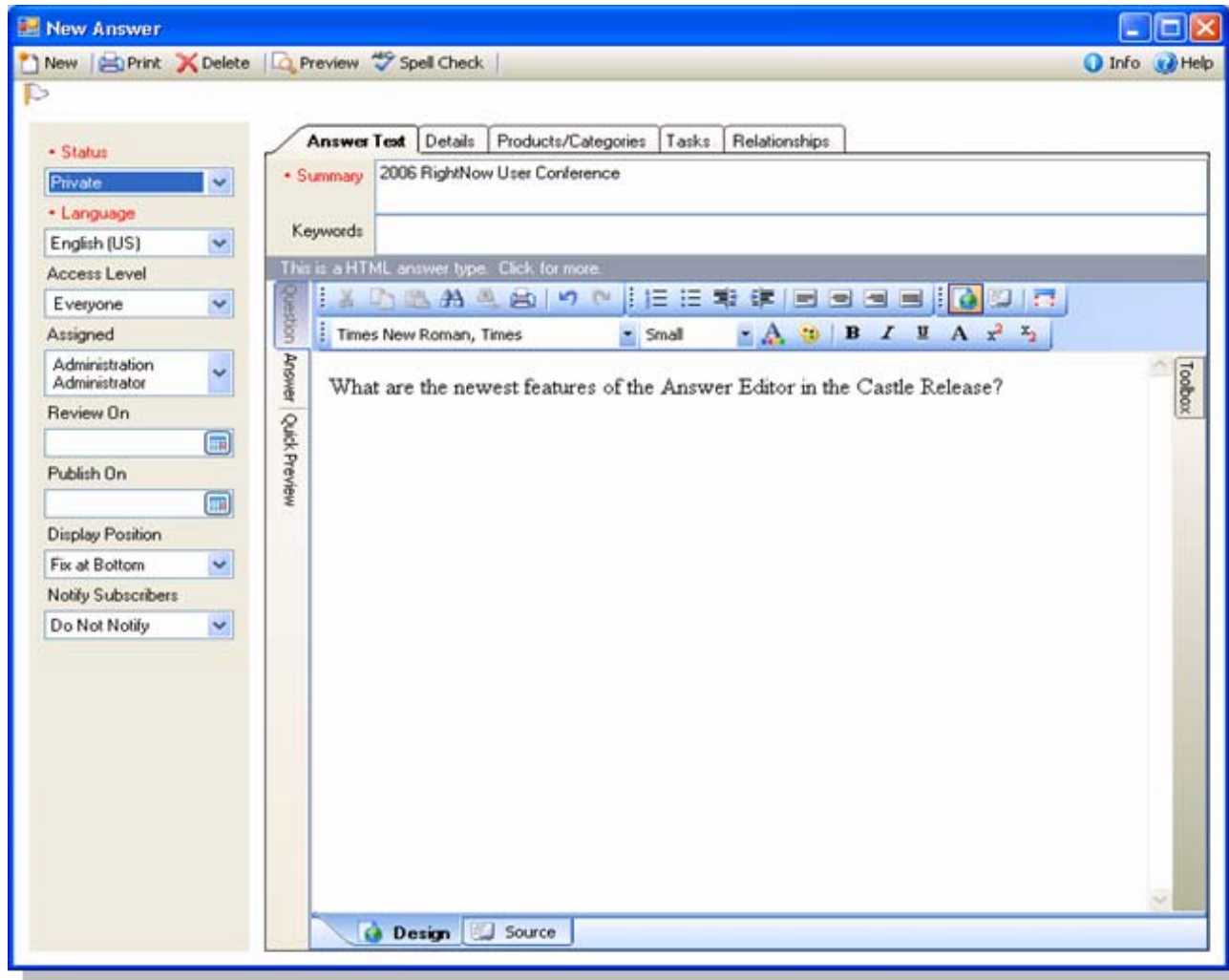
Set Review on dates

Identify Subject Matter Experts and Content Owners

Identify Your Customer needs by leveraging reports and working with Customer Service Reps



Answer Type HTML w/ New Editor - NetRix



New Answer Type → URL

The screenshot shows a web application window titled "New Answer". The interface includes a sidebar on the left with configuration options and a main content area for editing an answer.

Configuration Options (Left Sidebar):

- Status: Private
- Language: English (US)
- Access Level: Everyone
- Assigned: Administration Administrator
- Review On: [Empty field]
- Publish On: [Empty field]
- Display Position: Fix at Bottom
- Notify Subscribers: Do Not Notify

Answer Details (Main Content Area):

- Answer Text: Details Products/Categories Tasks Relationships
- Summary: 2006 RightNow User Conference
- Keywords: [Empty field]
- URL: <http://www.rightnow.com/summit>

Preview (Right Side):

This is a URL answer type. Click for more.

2006 RightNow Summit
Annual User Conference
September 10-13, 2006

Location:
Copper Mountain Resort, CO
<http://www.coppermeetings.com>

The 2006 RightNow Summit is



New Answer Type → File Attachment

The screenshot shows a web application window titled "New Answer". The interface includes a top navigation bar with tabs for "Incidents", "060919-000012", "Answers Default", "New Answer", and "New Answer". Below this is a menu bar with options: "New", "Save", "Save and Close", "Print", "Delete", "Preview", "Spell Check", "Info", and "Help".

On the left side, there is a sidebar with several configuration options:

- Status:** Private
- Language:** English (US)
- Access Level:** Everyone
- Assigned:** Administration Administrator
- Review On:** (calendar icon)
- Publish On:** (calendar icon)
- Display Position:** Fix at Bottom
- Notify Subscribers:** [No Value]

The main content area is titled "Answer Test" and has sub-tabs for "Details", "Products/Categories", "Tasks", and "Relationships". It contains the following fields:

- Summary:** Answer Presentation
- Keywords:** (empty)

A message states: "This is a File Attachment answer type. Click for more."

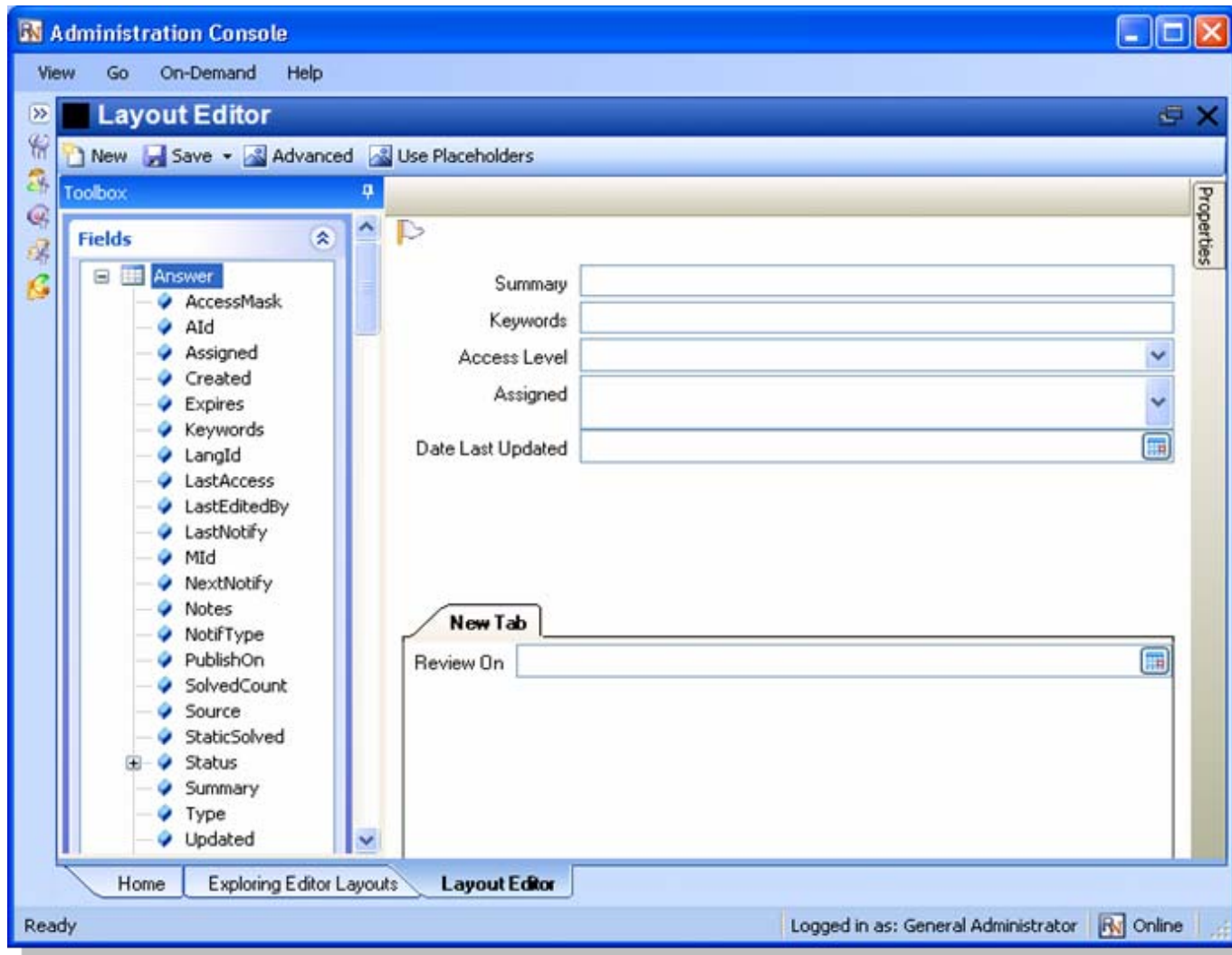
Below this is the "Answer as Attachment" section, which includes a toolbar with "Add File", "Delete", "Properties", "Download", and "Open".

A table lists the attached file:

Name	Size	Created	Updated	Description
KMM_Answer_2006v3.ppt	1.38MB	08/28/2006 03:02...		



Customizable Answer Editor



Upcoming Presentations

- **The Basics: Introduction to Knowledge Base Management**
Tuesday, 11:30-12:45
- **Advanced Knowledge Base Concepts: Optimizing the Self-Service Experience**
Tuesday, 1:45-3:00
- **Fine-Tuning Your RightNow Knowledge Base**
Tuesday, 3:30-4:45
- **Advanced Knowledge Base Administration: Driving Continuous Performance**
Wednesday, 10:30-11:45



Q&A

- Questions?
- Additional information
 - Ask the Experts booth
 - Product booth
 - Professional Services Training
 - <http://rightnow.custhelp.com>

