

Advanced Support Console Design: Views, Queues, and SLAs

Katelyn Miller – Senior Training Specialist
RightNow Service



Agenda

- Views
 - How data can be organized
- Queues
 - How data can be processed
- SLAs (Service Level Agreements)
 - Contracts applied to end-users
- Q&A



Views

- Ways to Hide Your Data
 - Filters: fixed, run-time selectable and node
- Express Yourself
 - Logical and color expressions
- Check Your Choices
 - Initial search and auto refresh
- Layers of Data
 - Drill-down views
- Determining Your Output
 - Using functions, column definitions



RightNow Support Console

DEMO



Fixed and Run-Time View Filters

Support Console View - Edit

Name: My Incidents Owner: Administrator

Data Set | Output | Permissions

Table Instances

- incidents
- contacts

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

Name	Expression 1	Operator	f...	Expression 2	
assgn_ac...	incidents.assgn_acct_id	in list	<input type="checkbox"/>	Logged In	

Fixed filters cannot be changed

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

Name	Expression	Oper...	Value	Prompt	▽ /
search_t...	incidents.search_...	=			▼
status_id	incidents.status_id	in list	Any		▼▲
created	incidents.created	betwe...	Any to Any		▼▲
updated	incidents.updated	betwe...	Any to Any		▼▲
source	incidents.source	in list	Any		▼▲
email	contacts.email	=			▼▲
last_name	contacts.last_name	=			▲

Logical Expression

Initial Search
 Auto Refresh

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



Node Filter

Support Console View - Edit

Name: Status Summation By Category Owner: Willie Eide

Data Set | **Output** | Permissions

Output Levels

- Levels
 - Top Cat
 - Output
 - Result Grouping
 - Result Ordering
 - Unresolved Level**
 - Output
 - Result Grouping
 - Result Ordering
 - Waiting Level
 - Output
 - Result Grouping
 - Result Ordering
 - Solved Level
 - Output
 - Result Grouping
 - Result Ordering

Level Name: Unresolved Level

Drill-down filter: incidents.cat_lv1

Drill-down link: sum(if (incidents.status_type=1, 1, 0))

Node Filters

Name	Expression 1	Operator	f...	Expression 2	∇ /
type	incidents.status_type	in list	<input type="checkbox"/>	Unresolved	

Logical Expression

Node filters provide levels of data segmentation



Display Options and Color Expressions

```
IF(date_diff(sysdate(),incidents.rel_due) > 28800 &
  (incidents.status_type='Unresolved' |
  incidents.status_type='waiting'),'green',
IF(date_diff(sysdate(),incidents.rel_due) > 14400 &
  (incidents.status_type='Unresolved' |
  incidents.status_type='waiting'),'blue',
IF(date_diff(sysdate(),incidents.rel_due) > 7200 &
  (incidents.status_type='Unresolved' |
  incidents.status_type='waiting'),'red','default'))))
```

If the difference between the system date and due date is greater than 8 hours and incident status type equals Unresolved or Waiting, then turn the incident green. Applies blue for 4 hours and red for 2 hours.



Display Options and Color Expressions

Support Console View - Edit

Name: Incidents - Filters and Expressions - Owner: Administrator

Data Set | **Output** | Permissions

Output Levels

- Levels
 - Incident Count
 - Output
 - Result Grouping
 - Result Ordering
 - Incident Details
 - Output
 - Result Grouping
 - Result Ordering

Output Columns

Column/Function	Column VM...	Data Len...	Column Heading	▼ / ▲
incidents.ref_no	<input checked="" type="checkbox"/> 100 px	All		▼
incidents.subject	<input checked="" type="checkbox"/> 300 px	All		▼ ▲
incidents.rel_due	<input checked="" type="checkbox"/> 100 px	N/A		▼ ▲
incidents.queue_id	<input checked="" type="checkbox"/> 100 px	All		▼ ▲
contacts.full_name	<input checked="" type="checkbox"/> 100 px	All	Customer	▲

Color Expression

```
IF(date_diff(sysdate(),incidents.rel_due)>28800 & (incidents.status_type='Unresolved' | incidents.status_type='waiting'),'green',  
IF(date_diff(sysdate(),incidents.rel_due)>14400 & (incidents.status_type='Unresolved' | incidents.status_type='waiting'),'orange',  
IF(date_diff(sysdate(),incidents.rel_due)> 7200 & (incidents.status_type='Unresolved' |
```



Display Options and Color Expressions

Support Console (2006uckatelynmiller)

Support Console

Quick Search ▾ Incidents - Filters and Expressions -km2 Refresh Search Fill New ▾ Edit ▾ Delete ▾ Print ▾ Forward Propose

Viewing Incidents - Filters and Expressions -km2: [Top Level](#) > Unresolved Records Found: 64

	Reference #	Subject	Date Due	Queue	Customer
1	060829-000001	Billing...	08/30/2006 08:00 AM	Tier One	Katelyn Miller
2	060829-000000	mobile plans...	08/30/2006 08:00 AM	Tier One	Katelyn Miller
3	060824-000000	CC Test...	08/25/2006 04:28 AM	Tier One	Katelyn Miller
4	060817-000001	What is a credit limit?...	08/18/2006 07:29 AM	Tier One	Katelyn Miller
5	060815-000000	Direct Billing...	08/15/2006 04:14 PM	Tier One	Katelyn Miller
6	060726-000000	Complete	07/27/2006 10:32 AM		Amy Sintes
7	060711-000000	Complete	07/12/2006 12:42 PM		Amy Sintes
8	060710-000000	nota	07/10/2006 04:00 PM	Tier One	
9	060705-000000	Complete	07/06/2006 11:20 AM		Amy Sintes
10	060626-000000	Complete	06/27/2006 10:18 AM		Randy Meacham



Function Usage in Views

Support Console View - Edit

Name: Status Summation By Category Owner: Willie Eide

Data Set Output Permissions

Output Levels

- Levels
 - Top Cat
 - Output**
 - Result Grouping
 - Result Ordering
 - Unresolved Level
 - Output
 - Result Grouping
 - Result Ordering
 - Waiting Level
 - Output
 - Result Grouping
 - Result Ordering
 - Solved Level
 - Output
 - Result Grouping
 - Result Ordering

Output Columns

Column/Function	Column Wi...	Data Len...	Column Heading	▼ / ▲
incidents.cat_lv1	150 px	All		▼
sum(if (incidents.status_type=1, 1, 0))	<input checked="" type="checkbox"/> 150 px	N/A	Unresolved Type	▼ ▲
sum(if (incidents.status_type=3, 1, 0))	<input checked="" type="checkbox"/> 150 px	N/A	Waiting for Customer	▼ ▲
sum(if (incidents.status_type=2, 1, 0))	<input checked="" type="checkbox"/> 150 px	N/A	Solved	▼ ▲
count(incidents.i_id)	<input checked="" type="checkbox"/> 50 px	N/A	Total	▲

Color Expression

Example of functions within column definitions

Another example of column display option



Function Usage in Views

Support Console

Quick Search ▾ ▶ Status Summation By Category Refresh Search Fill New ▾

Viewing Status Summation By Category: Top Level

	Category Hierarchy	Unresolved Type	Waiting for Customer	Solved	Total
1	No Value	43	6	19	68
2	General	5	0	14	19
3	Account and Billing	13	0	6	19
4	DSL and Internet Services	1	0	1	2
5	How Do I...?	6	0	6	12

Support Console

Quick Search ▾ ▶ Status Summation By Category Refresh Search Fill New ▾ Edit ▾ X Delete

Viewing Status Summation By Category: Top Level > Account and Billing

	Reference #	Subject	Queue	Assigned Account ID	Date Due
1	060711-000000	Complete			07/12/2006 12:42 PM
2	060726-000000	Complete		Kate	07/27/2006 10:32 AM
3	060802-000000	Complete		Kate	08/03/2006 10:45 AM
4	051021-000006	What is my latest bill amount	Tier One	Chuck S. Reynolds	10/21/2005 04:26 PM
5	051024-000000	I need to add more minutes to	Tier One	Chuck S. Reynolds	10/24/2005 04:00 PM
6	051024-000004	Can you direct bill my credit	Tier One	Chuck S. Reynolds	10/24/2005 04:00 PM
7	051025-000004	I need a copy of my bill?...	Tier One	Chuck S. Reynolds	10/25/2005 04:00 PM
8	051010-000001	How much does it cost to call	Tier One	Chris R. Morris	10/11/2005 10:31 AM
9	051019-000000	What is the cost of long	Tier One	Chris R. Morris	10/20/2005 10:30 AM
10	051103-000000	I have just returned from	Tier One	Chris R. Morris	11/03/2005 04:00 PM



Queues

- Types of Queues
 - Round robin and default
- Handling the Workload
 - Pull quantity
 - Pull Policies – Manual, First Due, and Strict Priority
 - Inbox limit
- Queue Statistics
 - Warning and critical levels
 - Session Console

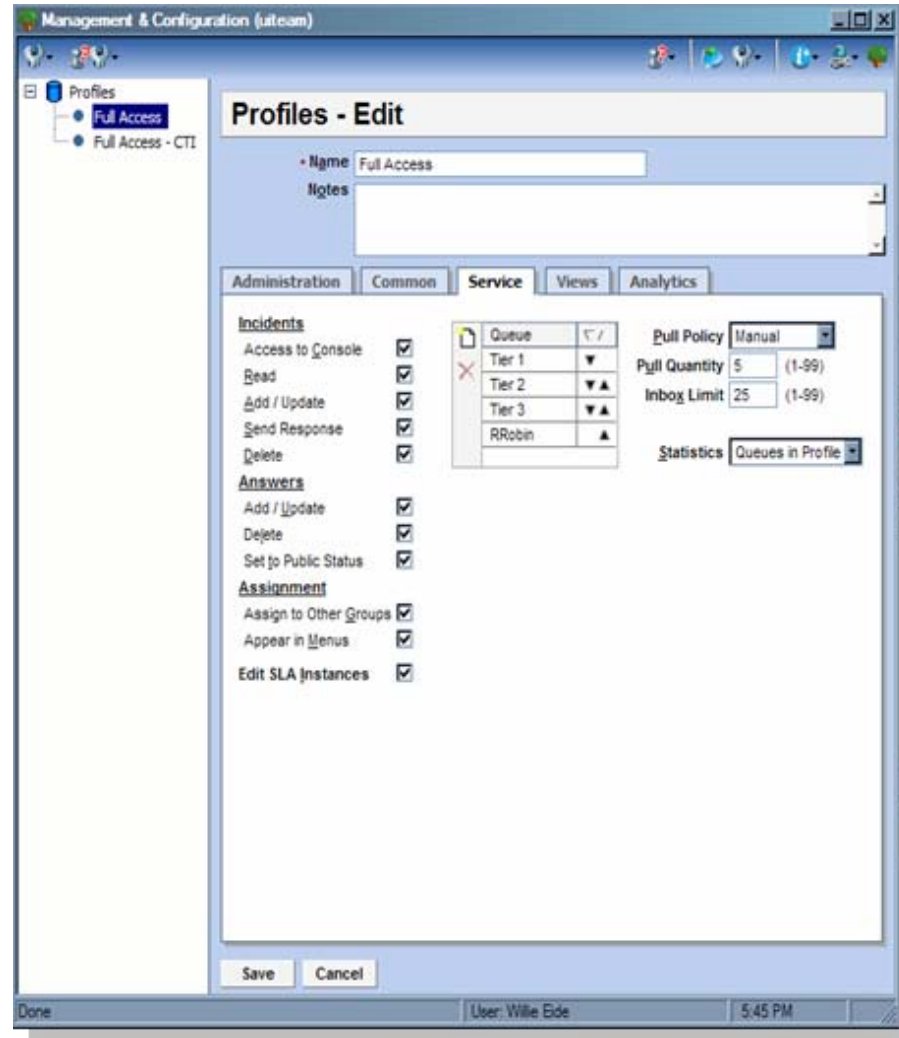
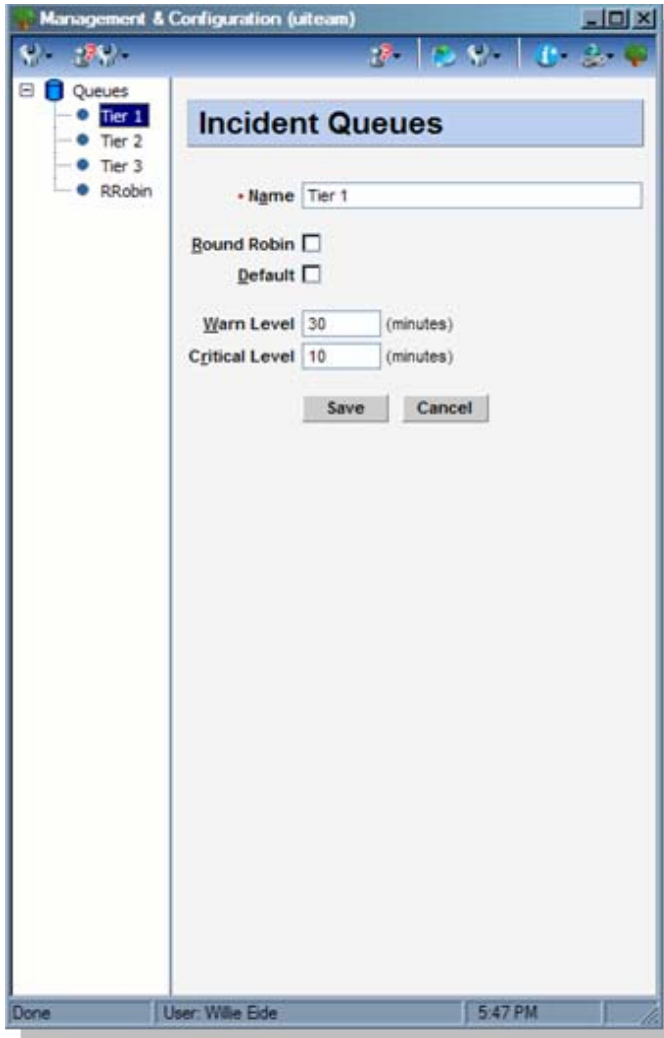


RightNow Support Console

DEMO



Creating and Defining Usage of Queues



Queue Statistics on the Session Console

CSRs – Agents currently logged into the system associated with the indicated queue

Unassigned – Unresolved incidents not yet assigned in that queue

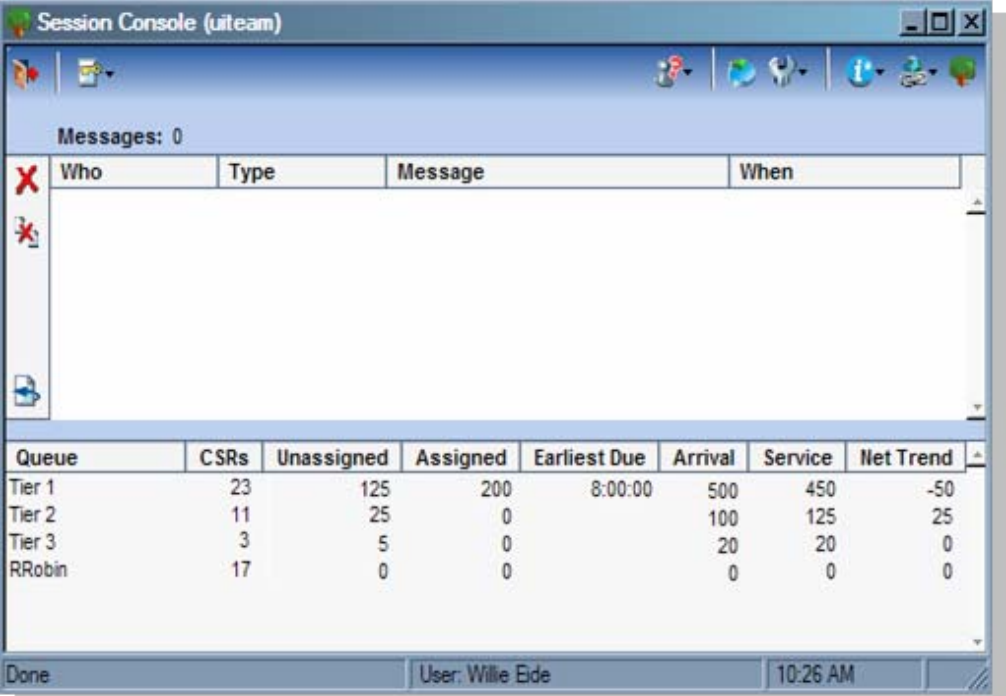
Assigned – Unresolved incidents that are assigned in that queue

Earliest Due – When the next incident will be due per the response interval

Arrival – Incidents that have arrived in the specified time window

Service – Incidents either resolved or moved to another queue within the specified time window

Net Trend – Difference between Arrival and Service statistics



The screenshot shows the 'Session Console (uiteam)' window. At the top, it displays 'Messages: 0'. Below this is a table with columns: Who, Type, Message, and When. The main part of the window is a statistics table with the following data:

Queue	CSRs	Unassigned	Assigned	Earliest Due	Arrival	Service	Net Trend
Tier 1	23	125	200	8:00:00	500	450	-50
Tier 2	11	25	0		100	125	25
Tier 3	3	5	0		20	20	0
RRobin	17	0	0		0	0	0

At the bottom of the window, it shows 'Done', 'User: Willie Eide', and '10:26 AM'.

SLAs – Service Level Agreements

- **The 5 Ws**
 - **Who** – Which organization/contact gets them? How do you associate SLAs?
 - **What** – Types of SLAs (entitlement, access points, response requirements)
 - **Where** – In what areas of the product are SLAs visible (assigning, viewing)?
 - **When** – Active dates and expiration dates
 - **Why** – What affect does this have on your organization?



RightNow Support Console

DEMO



Defining an SLA

Management & Configuration (2006suckatelynmiller)

Service Level Agreements - Edit

- Service Level Agreements
 - Gold
 - Internal
 - High Level
 - Riverstar
 - 20 Email Only Incidents
 - 50 Use Them Anyway You Want Incident

Name: 20 Email Only Incidents

Active:

Chat Incidents: 0

CSF Incidents: 20

Email Incidents: 20

Self-Service Incidents: 0

Total Incidents: 20

Length: 1 years

Self-Service:

Access Levels: Gold, Internal, Dealer, Riverstar

Response Requirements: [2006suckatelynmiller](#)

Save Cancel

Done User: Katelyn Miller 12:19 PM



Granting New or Previewing Issued SLAs

SLA Edit
_ □ ×

Current SLA Instances

SLA	Active Date	Expire Date	Self-Service	Total Incidents
50 Use Them Anyway You Want Incidents	8 / 17 / 2006	8 / 17 / 2007	Yes	50 / 50

SLA: 50 Use Them Anyway You Want Incidents

Active Date: 08/17/2006 12:00 AM
Expiration Date: 08/17/2007 12:00 AM

Chat Incidents: 50 / 50
CSR Incidents: 50 / 50
Email Incidents: 50 / 50
Self-Service Incidents: 50 / 50
Total Incidents: 50 / 50

Self-Service: Yes

Access Levels:

Response Requirements(default)

Interface: 2006uckatelynmiller ▾

Response Time: 0 Days 8 Hours 0 Minutes
Resolution Time: 1 Days 0 Hours 0 Minutes

Response Intervals

Day	Start Time	End Time
Monday	12:00 AM	11:59 AM
Tuesday	12:00 AM	11:59 AM
Wednesday	12:00 AM	11:59 AM
Thursday	12:00 AM	11:59 AM

Holidays

Name	Date
Christmas	12/25/2003
New Years Day	01/01/2004

New SLA Instances

SLA	Active Date	
		▼▲



Service Level II Workshops

RightNow Service 7.5 Level II Workshop

Princeton, New Jersey

September 26th, 2006 8:30 am to September 29th,
2006 4:30 pm

San Mateo, California

December 05th, 2006 8:30 am to December 08th, 2006
4:30 pm



Q&A

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

