



# iConnect for Oracle CRM OnDemand User Guide

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**InQuira, Inc.**

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## PATENTS

Patents 7,668,850, 7,672,951, 7,747,601. Other patents pending.

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# About This Guide

This guide provides detailed instructions and supporting information for the use of the Self-Service Portal features associated with the iConnect for Oracle CRM OnDemand. This guide is intended for users who interact with the the Self-Service Portal.

This preface includes information on:

- The general organization of this guide
- The InQira contact information
- The available product documentation

## In This Guide

The iConnect for Oracle CRM OnDemand User Guide is divided into the following sections:

<b>Chapter 1, “User Registration”</b>	This chapter describes self-service user registration.
<b>Chapter 2, “Login”</b>	This chapter describes self-service user login options and process.
<b>Chapter 3, “Managing User Activities”</b>	This chapter describes self-service user activities.
<b>Appendix A, “Outages.”</b>	This appendix provides self-service outage examples.

## Contacting InQira

You can contact InQira by mail, telephone, fax, and email.

<b>Address:</b>	900 Cherry Ave. 6th Floor San Bruno, CA 94066
<b>Telephone:</b>	(650) 246-5000
<b>Fax:</b>	(650) 246-5036
<b>Email:</b>	For sales information, send email to <a href="mailto:sales@inquira.com">sales@inquira.com</a> . For product support, send email to <a href="mailto:support@inquira.com">support@inquira.com</a> .
<b>World Wide Web:</b>	Learn more about InQira products, solutions, services, and support on the world wide web at: <a href="http://www.inquiracom.com">www.inquiracom.com</a> .

## InQira Product Documentation

InQira documentation is available only to licensed users of our software products and may not be redistributed in any form without express permission from InQira, Inc.

The InQira documentation is available in PDF format. Customers can download the PDF files from:

<http://documentation.inquiracom.com/>

**Note:** You need a PDF reader application installed on each processor on which you plan to view the InQuira product documentation. The Adobe Acrobat reader is available from Adobe Systems at: <http://www.adobe.com>.

If you encounter a problem, need help using the documentation, or want to report an error in the content, please contact InQuira Customer Support.

If you need help obtaining InQuira product documentation, or want to obtain permission to redistribute a portion of the contents, please contact your InQuira account representative.

Detailed information about each product document set is available in:

- “InQuira Analytics Documentation” on page 4
- “Intelligent Search Documentation” on page 4
- “Information Manager Documentation” on page 5
- “iConnect Integration Documentation” on page 6

Additional information about documentation conventions and standards can be found in:

- “Screen and Text Representations” on page 6
- “References to World Wide Web Resources” on page 6

## InQuira Analytics Documentation

InQuira Analytics is distributed with the following documentation.

Document	Number	Description
<b>InQuira Analytics Installation Guide</b>	IA80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Analytics. It provides detailed information on installing and configuring the InQuira Analytics product for use with an InQuira 8.2.3 application.
<b>Analytics User Guide</b>	IA80-CA-00	This guide is intended for systems and application administrators who need to configure the Intelligent Search and Information Manager Analytics components to report on InQuira 8.2.3 application performance.

## Intelligent Search Documentation

Intelligent Search is distributed with the following documentation.

Document	Number	Description
<b>Intelligent Search Installation Guide</b>	IS80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira 8.2.3. It provides detailed information on installing InQuira 8.2.3 and configuring the application on a single processor using the Installation Configuration Environment facility.
<b>Intelligent Search Administration Guide</b>	IS80-CA-00	This guide is intended for system and application administrators who need to configure an InQuira 8.2.3 application in an enterprise environment. It describes InQuira 8.2.3 integration, development, configuration, and maintenance processes and tasks.

<b>Document (continued)</b>	<b>Number</b>	<b>Description (continued)</b>
<b>Intelligent Search Language Administration Guide</b>	IS80-LA-00	This guide is intended for business users and subject matter experts who need to create and maintain the language processing elements of a InQuira 8.2.3 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira 8.2.3 language objects, and task information about the process of managing the user experience provided by the InQuira 8.2.3 application.
<b>Intelligent Search Language Tuning Guide</b>	IS80-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira 8.2.3 language-processing elements using the Dictionary and other InQuira Language Workbench applications.
<b>Intelligent Search Optimization Guide</b>	IS80-AG-00	This guide is intended for application developers who need to implement InQuira 8.2.3 advanced features, including Personalized Navigation and Process Wizards.
<b>Intelligent Search Application Development Guide</b>	IS80-API-00	This guide provides information about integrating and customizing the InQuira 8.2.3 Personalized Response User Interface.
<b>Intelligent Search Language Reference</b>	IS80-LRG-00	This guide is for language developers implementing InQuira 8.2.3 applications that utilize the intent libraries and advanced language processing functions. These guides are published as separate documents that provide reference information for each industry-specific intent library. Each reference also contains complete descriptions of InQuira Match Language and Variable Instantiation Language.
<b>Intelligent Search User Interface Guide</b>	IS80-UI-00	This guide is intended for application developers who need to customize the InQuira 8.2.3 Personalized Response User Interface, and integrate it with a production web application. It contains information about the elements and features of the User Interface, and provides guidelines for integrating it into an enterprise web architecture, customizing its appearance and functionality, and implementing various special features.

## Information Manager Documentation

InQuira Information Manager is distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>Information Manager Installation Guide</b>	IM80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product.
<b>Information Manager Administration Guide</b>	IM80-CA-00	This guide is intended for systems and application administrators who need to configure and administer an InQuira Information Manager application, and integrate it with an InQuira 8.2.3 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
<b>Information Manager Content Authoring Guide</b>	IM80-AG-00	This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.

<b>Document (continued)</b>	<b>Number</b>	<b>Description (continued)</b>
<b>Information Manager Developer's Guide</b>	IM80-WSR-00	This guide is intended for application developers who need to integrate Information Manager content, content category, and user and security functions with external applications. It contains reference information and examples for all packages, classes, methods, and interfaces of the Information Manager Web Services API.

## iConnect Integration Documentation

The InQira iConnect products are distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>iConnect Developers Guide</b>	CA20-IG-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQira iConnect with an InQira application and a supported CRM application.
<b>iConnect for Siebel Contact Center Integration Guide</b>	CA82-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQira iConnect with an InQira application and a supported Siebel application.
<b>iConnect for Oracle CRM On Demand Integration Guide</b>	CRM082-SG-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQira iConnect with an InQira application and a supported Oracle CRM On Demand application.
<b>iConnect for Oracle CRM OnDemand User Guide</b>	CRM082-SS-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQira iConnect with an InQira application and a supported Oracle CRM On Demand self-service portal.

## Screen and Text Representations

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

## References to World Wide Web Resources

For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

# User Registration

## Introduction

InQuira's iConnect for Oracle CRM OnDemand uses the Self Service Portal, an online case management system that enables companies implement web self-service. Self Service integrates Intelligent Search, Discussion Forums, and Information Manager together with Case Management capabilities into a comprehensive knowledge portal that reduces the cost of implementation and ensures consistency of information across all user constituencies, including customer, employees and partners.

Self-Service Portal supports user registration and user account activation triggered via email notification.

Self Service Portal supports escalation processes where a user can submit a case through the knowledge portal. It uses Intelligent Search to attempt to deflect the case or email by providing potential answers to the user's question. Customers can open and track cases online. Employees of a company (Customer) can open and track company cases. They can create topics in discussion forums from their specific case context. They can create notes, upload attachments for a case.

Portal has Time Zone Support for end-users. User can specify the time zone they belong to during the time of registration; they can also modify their time zone settings.

**Important!** To use Internet Explorer 8, you must make the following adjustments:

- a Navigate to IE8 Tools->Internet Options->Security->Internet .
- b Set it to **Default Level**.
- c Go to Trusted Sites-> Sites.
- d Add these two sites as trusted sites:
  - \*.inquira.com
  - https://sso.ondemand.com

## Registration

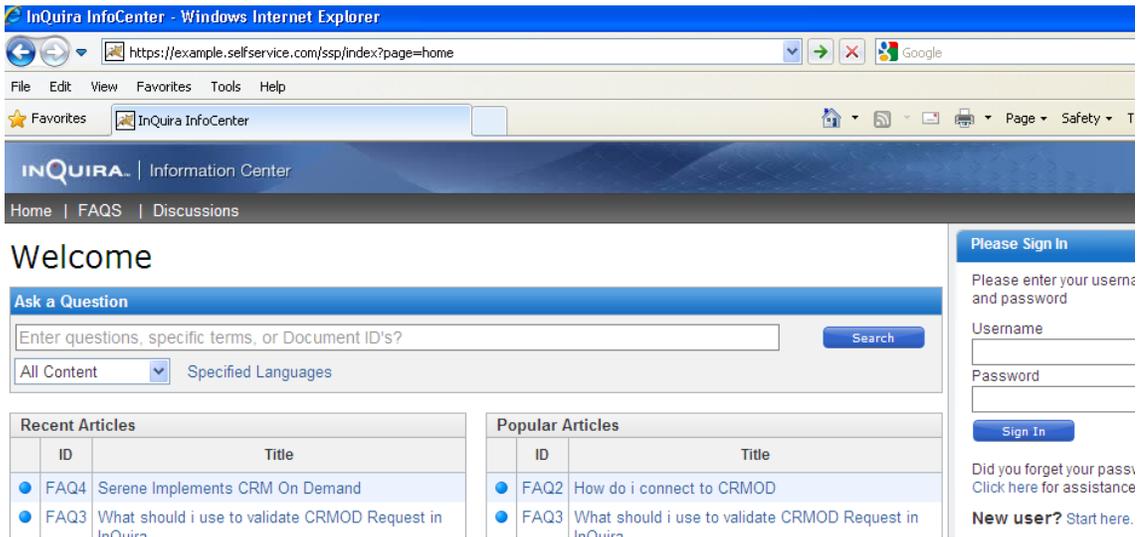
### New User Registration

Steps to register if you are new user:

- 1 Go to the Self Service Portal URL.
- 2 Click on New User? 'Start here' link under the login.  
The page redirects to the 'New User Registration' page.
- 3 Enter all the required fields (If the word verification is not legible, click on  to get a new word).
- 4 Change the default time zone, if needed.
- 5 Click 'Register'.
- 6 If registration fails, an appropriate message displays.

## WALK-THRU

- 1 Go to the Self Service Portal URL & Click on New User? 'Start here' link under the login



- 2 The page redirects to the 'New User Registration' page

Home > Registration

## New User Registration

Use the form below to edit your profile and settings. All fields are required.

Account Information	
User ID:	<input type="text"/> <input type="checkbox"/> Use my user id as my email address
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Display Name to Public:	<input type="checkbox"/>
Email:	<input type="text"/>
Display Email Address to public:	<input type="checkbox"/> (Checking box enables other users to view your email address)
My Time Zone	(GMT-07:00) Arizona <input type="text"/>
Additional Requests (Optional)	
	<input type="checkbox"/> (I would like to manage cases online)
Word Verification:	<input type="text"/>  (By entering this text you help us prevent spam and fake registrations)

- 3 Enter all the required fields (First Name, Last Name, Email, User ID, Word Verification)  
You can use your email address as your user ID. To do so, select the **Use my user id as my email address** checkbox.  
If you do not select Display Name to Public, the system prompts you for an alias.
- 4 Change the default time zone, if needed.

<b>My Time Zone</b>	(GMT-08:00) Pacific Time (US & Canada): Tijuana	
<b>Additional Requests (Optional)</b>	(GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi	
	(GMT+05:45) Kathmandu	
	(GMT+06:00) Almaty, Novosibirsk	
	(GMT+06:00) Astana, Dhaka	
	(GMT+06:00) Sri Jayawardenepura	
<b>Word Verification:</b>	(GMT+06:30) Rangoon	spam and fake
	(GMT+07:00) Bangkok, Hanoi, Jakarta	
	(GMT+07:00) Krasnoyarsk	
	(GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi	
	(GMT+08:00) Irkutsk, Ulaan Bataar	
	(GMT+08:00) Kuala Lumpur, Singapore	
	(GMT+08:00) Perth	
	(GMT+08:00) Taipei	
	(GMT+09:00) Osaka, Sapporo, Tokyo	
	(GMT+09:00) Seoul	

[Register](#)

- 5 Click on 'Register'
- 6 Following message will be displayed on the SSP Home page

**INQUIRA** | Information Center

Home | FAQs | Discussions

## Welcome

**Registration Request Received**  
An activation email has been sent

- 7 If the registration fails, an appropriate message will be displayed to the end user
  - a If the user name is already taken, the user will get the following message

### New User Registration

**Sorry, that username is already taken.** Although you indicated you're a new user, an account already exists for the User ID you entered. Please select a different User ID or [Sign in](#) first. Forgot your password [click here](#) for assistance.

- b If the email id is already taken, the user will get the following message

### New User Registration

**Sorry, that email address is already taken.** Although you indicated you're a new user, an account already exists for the Email address you entered. Please [Sign in](#) or if you forgot your password [click here](#) for assistance.

- c If information provided during registration is ambiguous, depending on the configuration of the portal, user may get registered or may get the following message, in which case user needs to contact the administrator/customer support for further assistance

## New User Registration

 Duplicate records found for this email, Please contact Customer Support for assistance

- d At times, if the system is down, you may get the following message

## New User Registration

 We are experiencing some technical problems processing your request. Please try again after some time.

**Important!** Time Zone – Daylight Saving Time [DST] is not supported. This may lead to incorrect default location selection if there are multiple locations that belong to the same time zone.

For example, actual User TimeZone/Location:(GMT-06:00) Saskatchewan

Available TimeZones:

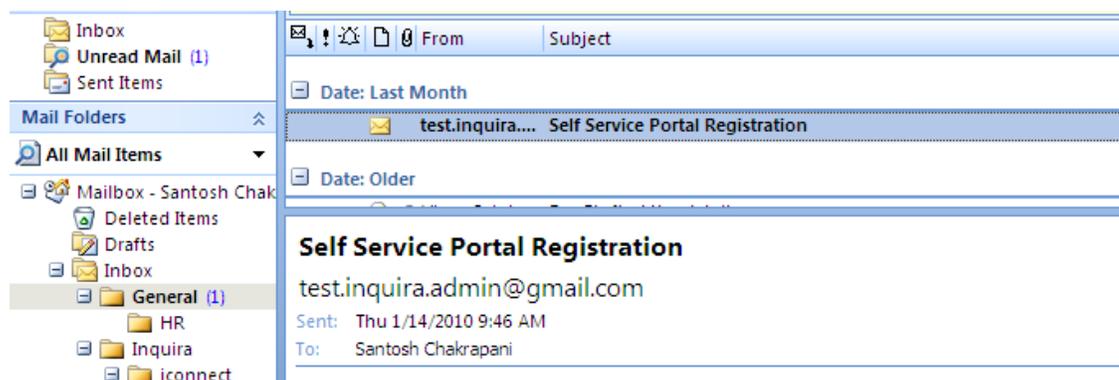
- (GMT-06:00) Central America
- (GMT-06:00) Central Time (US & Canada)
- (GMT-06:00) Mexico City
- (GMT-06:00) Saskatchewan
- (GMT-06:00) Tegucigalpa

The application defaults the first available:- (GMT-06:00) Central America.

Users may need to manually correct the time zone.

## Account Activation

- 1 If registration process was successful, an email will be sent to the user



- 2 Email contains the steps required to activate the newly registered user

### Self Service Portal Registration

test.inquiradmin@gmail.com

Sent: Thu 1/14/2010 9:46 AM

To: Santosh Chakrapani

Hi Santosh,

Thanks for registering with Self Service Portal.

1. Click the following link to complete your activation process:-

[Click here to complete registration](#)

2. After successful activation, you may login with following credentials :-

Login: schakrapani

Password: 22fdc

Note: You may not be able to access case management if you login without activating your account!

- 3 Clicking the link provided in the email should complete the registration process and activate the user account. The following message is displayed on the home page of the Self Service Portal



**Important!** User passwords between Information Manager and CRMOD must be synchronized manually.

# Login

Logging into the portal is a pretty standard process.

- 1 Go to the Self Service Portal site
- 2 Login using the credentials provided in the email

ID	Title
FAQ2	How do i connect to CRMOD
FAQ3	What should i use to validate CRMOD Request in InQuira

- 3 If this is the first time user has logged in or if user has not updated the password yet after registration, the portal will redirect to the Reset Password page and recommend the user to reset the password. If user chooses to reset the password, they can provide the new password and click on 'Update' button. They could, as well, choose not to update the password and click on 'Cancel' button, however the reset password recommendation will show up when the login the next time.

INQUIRA. | Information Center

Home | FAQS | Discussions

Home > My Settings > Reset Password

## Reset Password

**You are strongly recommended to reset your password**  
Your current password is auto-generated. For security reasons you may need to change it

Use the form below to reset your password.

**Change Password**

(\* required field)

Password: \*

Retype Password: \*

[Update](#) [Cancel](#)

## Forgot Password?

If the user has forgotten his/her password, portal provides the ability to recover it. To recover the Self Service Portal password, follow these steps:

- 1 On the home page, follow the 'Click here' link under 'Did you forget your password?'
- 2 Enter the 'Email Address' and click on 'Send' button
- 3 An email will be sent with the password reminder

## WALK-THRU

**Please Sign In**

Please enter your username and password

Username

Password

[Sign In](#)

Did you forget your password?  
[Click here](#) for assistance.

**New user?** Start here.

**INQUIRA™** | Information Center

Home | FAQs | Discussions

Home > Request Your Password

## Request Your Password

Please enter your Email address in order to verify your identity. We will then send your password to your email account.

**Email Address:**



Home | FAQs | Discussions

Home

## Please sign in.

 **Password Update Email has been sent**  
An email has been sent with information about your password

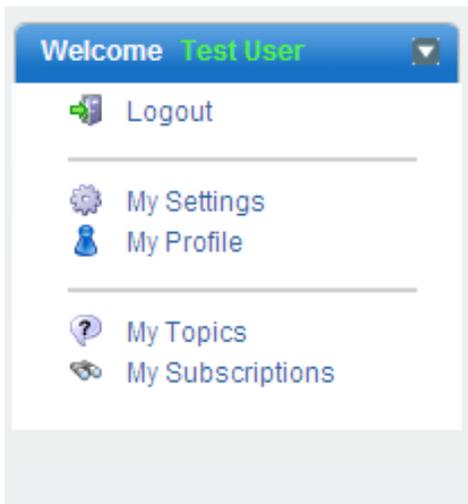
### Didn't Get the Email?

- First, be patient, sometimes it takes a while for the email to arrive.
- Check your junk email box, the message might have been filtered as junk.
- If you can't get it to work try resending the email.

## Reset Password

To reset the password, follow these steps:-

- 1 Login into Self Service Portal
- 2 Click on 'My Settings' and then Click 'Reset Password'



Welcome **Test User**

 Logout

---

 My Settings

 My Profile

---

 My Topics

 My Subscriptions



## My Settings

Use the form below to edit your profile and sett

Profile	
(* required field)	
First Name: *	<input type="text" value="Test"/>
Last Name: *	<input type="text" value="User"/>
Display Name to Public:	<input checked="" type="checkbox"/>
Email: *	<input type="text" value="schakrapani@serenecor"/>
Display Email Address to Public:	<input type="checkbox"/>
Reset Password:	<a href="#">Reset Password</a>

- 3 Enter the password and retype the password and click on 'Update'

Home > My Settings > Reset Password

## Reset Password

Use the form below to reset your password.

Change Password	
(* required field)	
Password: *	<input type="text"/>
Retype Password: *	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Home > My Settings

## My Settings



Your password has been reset.

Use the form below to edit your profile and settings.

Profile	
(* required field)	
First Name: *	<input type="text" value="Test"/>
Last Name: *	<input type="text" value="User"/>

## Reset Time Zone

To reset the time zone, follow these steps:-

- 1 Login into Self Service Portal
- 2 Click on 'My Settings'
- 3 Update the 'My Time Zone' accordingly.

**Note:** Updating the time zone will convert all the dates displayed to the set time zone preferences.

**Important!** Time Zone – Daylight Saving Time [DST] is not supported. This may lead to incorrect default location selection if there are multiple locations that belong to the same time zone.

For example, actual User TimeZone/Location:(GMT-06:00) Saskatchewan

Available TimeZones:

- (GMT-06:00) Central America
- (GMT-06:00) Central Time (US & Canada)
- (GMT-06:00) Mexico City
- (GMT-06:00) Saskatchewan
- (GMT-06:00) Tegucigalpa

The application defaults the first available:- (GMT-06:00) Central America.

Users may need to manually correct the time zone.

# Case Management

## Introduction

A case holds all relevant, detailed information for a particular service activity. You can also use the case to store additional information, such as topics or activities required to resolve the issue.

Having all cases located in one place means that users can access all the relevant information that customer service representatives need to resolve their issues.

When dealing with cases, users perform four high-level steps:

- 1 **Create a Case (Submit a Case Online)**  
Verify the user information and record the issue. Submit additional attachments in support of the case being created.
- 2 **View Cases (My Cases, Company Cases)**  
View cases specific to the user and/or view company cases
- 3 **Search Cases**  
Search for cases based on specific criteria
- 4 **View/Update Case Detail**  
View the progress of the case, Update the case with additional notes, and modify the case summary and description. The case could be own case or company case.

## Create a Case (Submit a Case Online)

### Steps to create a new case

- 1 Click on the 'Submit a Case Online' link
- 2 Enter the 'Summary' field to briefly describe the issue and click 'Next' button
- 3 Inqira knowledge base is searched and all matching answers are shown.
- 4 If user is not satisfied with the answers, click on 'No'
- 5 A detailed page is presented to provide additional information about the case

Field	Description
<b>User Information</b>	
Email	Email address (Prepopulated & Not Editable)
First Name	First Name (Prepopulated & Not Editable)
Last Name	Last Name of Portal User (Prepopulated & Not Editable)
<b>Service Detail Information</b>	
Area	Category of service request, such as Product, Installation, Maintenance, Training, Other.

**Field (continued) Description (continued)**

Cause	Reason for service request, such as Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Priority	Indication of priority, such as 1-ASAP, 2-High, 3-Medium, 4-Low
Problem Summary	Summary of Case
Description	Additional information about the service request. Limit of 4000 characters.

- 6 Attach multiple files (possibly Screenshots or other documents) supporting their case.
- 7 Click on 'Save' button

**WALK-THRU**

- 1 Click on 'Submit a Case Online' link

Welcome

**Ask a Question**

Enter questions, specific terms, or Document ID's?

All Content

Recent Articles	
ID	Title
FAQ4	Serene Implements CRM On Demand
FAQ3	What should i use to validate CRMOD Request in InQuira
FAQ2	How do i connect to CRMOD
FAQ1	How do i configure my sp100/

Popular Articles	
ID	Title
FAQ2	How do i connect to CRMOD
FAQ3	What should i use to validate CRMOD Request in InQuira
FAQ4	Serene Implements CRM On Demand
FAQ1	How do i configure my sp100/

Welcome **Test User**

- Logout
- My Settings
- My Profile
- My Topics
- My Subscriptions

**My Recent Searches**

**Additional Assistance**

- Submit a Case Online
- View My Cases
- Search Cases
- Give us Your Feedback

- 2 Enter the problem summary and click next

Home > Submit a Case Online

Submit Consumer Support Case

Step 1: Enter Brief Problem Description

Enter Problem Summary

(\* required field)

Problem Summary\*

Enter a brief problem summary, you will be able to enter additional details later.

- Review possible answers, if answer does not solve your problem, click next

[Home](#) > [Submit a Case Online](#)

## Submit Consumer Support Case

### Step 2: Review Possible Answers

Review Possible Answers	
	<p><b>Master Data Management</b></p> <p>Our expertise with EAI tools such as Oracle Fusion Middleware, TIBCO, WebSphere, WebLogic, and others, provides you with seamless EAI implementation. Our expertise with Canonical models and open-standard architectures and data models such as OAGIS help you build a robust and scalable integration architecture driving down TCO and greatly enhancing your ability to respond to changes quickly. An active partnership with Oracle in their MDM development and testing, combined with our experience and expertise, allows us to add real value to your business.</p>
<p> <input type="button" value="◀ Previous"/>           Did an answer above solve your problem?           <input type="button" value="Yes"/> <input type="button" value="No ▶"/> </p>	

- Enter case details and click on 'Save' button

[Home](#) > [Submit a Case Online](#)

## Submit Consumer Support Case

### Step 3: Complete Support Request Form

User Information	
Contact Email Id	<input type="text" value="schakrapani@serenecorp.com"/>
Contact First Name	<input type="text" value="Santosh"/>
Contact Last Name	<input type="text" value="C"/>
Case Information (* required field)	
Area	<input type="text" value="Product"/>
Cause	<input type="text" value="New Issue"/>
Priority	<input type="text" value="3-Medium"/>
Problem Summary *	<input type="text" value="Inquire knowledge database is down"/>
Description *	<input type="text" value="I am unable to access the knowledge base"/>
Attachments	<input type="text" value="C:\Documents and Setting"/> <input type="button" value="Browse..."/> Add another attachment
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- Case is created and the message is shown

## View Case Details

 A case has been successfully created

Case Information	
Case Number	480430-237963383
Status	Open
Last Updated	02-09-2010 01:27 PM
Case Owner	
More Information	
Priority	3-Medium
Contact Name	Santosh C
Area	Product
Cause	New Issue
Problem Summary	Inquira knowledge database is down
Description	I am unable to access the knowledge base
Attachments	<a href="#">iConnectSetupHelp.doc</a>
Notes	

## View My Cases

The View My Cases is the starting point for managing cases. From this page, user can review multiple cases at a glance. Filters are provided to limit the number of cases to work with at a time. Users can select a case to view, update. The cases belong to the logged in user.

View My Cases is sensitive to the role assigned to the user. If the user only has View My Cases role, they will not be able to update a case, however they will be able to submit a case online.

### WALK-THRU

Click on the 'View My Cases' link under Additional Assistance section in the home page

By default, latest 10 cases will be shown (Sorted by Case # in descending order)

## View My Cases

Previous Next

**Support Case List**

View  All Cases  Open Cases  Closed Cases Records per page 10

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237963383	Inquire knowledge database is down	3-Medium	Open	schakrapani@serenecorp.com	02-09-2010 01:27 PM	<a href="#">View</a>
480430-237853468	iConnect not working	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:43 AM	<a href="#">View</a>
480430-237853146	I am unable to setup SSO for iConnect	1-ASAP	Closed	schakrapani@serenecorp.com	02-09-2010 03:42 AM	<a href="#">View</a>
480430-237850023	SSO Setup has no images	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:34 AM	<a href="#">View</a>

Previous Next

To view only Open Cases, click on the 'Open Cases' radio button

## View My Cases

Previous Next

**Support Case List**

View  All Cases  Open Cases  Closed Cases

Records per page

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237963383	Inqura knowledge database is down	3-Medium	Open	schakrapani@serenecorp.com	02-09-2010 01:27 PM	<a href="#">View</a>
480430-237853468	iConnect not working	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:43 AM	<a href="#">View</a>
480430-237850023	SSO Setup has no images	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:34 AM	<a href="#">View</a>

Previous Next

To view only 'Closed Cases', click on the 'Closed Cases' radio button

## View My Cases

Previous Next

**Support Case List**

View  All Cases  Open Cases  Closed Cases

Records per page

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237853146	I am unable to setup SSO for iConnect	1-ASAP	Closed	schakrapani@serenecorp.com	02-09-2010 03:42 AM	<a href="#">View</a>

To limit the number of cases presented at a time, user can change value of 'Records per page' dropdown. The allowed values are 2, 5 and 10.

## Sorting

By default, the records are sorted in descending order by Case Number. Users can sort the records by #(Case Number), Problem Summary, Priority, Status, Contact and Last Updated. Note that sorting will sort the complete result set rather than sorting the list of records on the current page. So if the user clicks on Sort when on a second page, the application will sort and restart case list from the first page.

## Pagination

If the number of cases exceeds the limit set by 'Records per page', the results will be paginated. User can navigate using 'Previous' and 'Next' buttons. If there are additional pages, the 'Next' button will be rendered blue and if there are no additional pages the 'Next' button will be grayed out. The 'Previous' button is grayed out if there is nothing to navigate back to and will be rendered blue if there are pages that users can navigate back to.

If the users have case update capability, they will be able to update cases they own. They however cannot view/update company cases. They can apply filters to View All, Open or Closed cases.

## WALK-THRU

In Addition to the View link, the user will also see an Update link. Clicking on the update link will take the user the Edit Case Detail page.

## View My Cases

Support Case List							
View <input checked="" type="radio"/> All Cases <input type="radio"/> Open Cases <input type="radio"/> Closed Cases							Records per page
#	Problem Summary	Priority	Status	Contact	Last Updated	Action	
480430-237963383	Inquire knowledge database is down	3-Medium	Open	schakrapani@serenecorp.com	02-09-2010 01:27 PM	View   Update	
480430-237853468	iConnect not working	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:43 AM	View   Update	
480430-237853146	I am unable to setup SSO for iConnect	1-ASAP	Closed	schakrapani@serenecorp.com	02-09-2010 03:42 AM	View   Update	
480430-237850023	SSO Setup has no images	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:34 AM	View   Update	

Home | FAQs | Discussions

## Edit Case Details

User Information			
Contact Name	Test User	Last Updated	02-11-2010 11:48 PM
Contact Email Id	schakrapani@serenecorp.com	Case Owner	
Case Details (* required field)			
Case Number	480430-237963383	Status	Open
Priority	3-Medium		
Area	Product		
Cause	New Issue		
Problem Summary *	Inquire knowledge database is down		
Description *	I am unable to access the knowledge base; test		

## View Company Cases

The View Company Cases is the starting point for managing company cases. If the user does not have access to company cases, the link to 'View Company Cases' will not display under 'Additional Assistance' section.

From this page, user can review multiple cases at a glance. The cases belonging to the same account as the logged in user are displayed.

**Note:** Account information for a user as well as a case is not displayed in the self-service portal. The association of a user or a case with an account is performed by an administrator.

Filters are provided to limit the number of company cases to view at a time. Users can select a case to view, update depending on the role assigned to the user. If the user only has View Company Cases role, they will not be able to update a case.

Users can view company case information if they own the case and/or manage the owner of the case and have access to view company cases; similarly users can update company case information if they own the case and/or manage the owner of the case and in addition have access to update company cases.

**Note:** An administrator can adjust access levels to restrict or expand access to records. If users feels that they do not have the right access, they can call the administrator and have their access roles updated accordingly

User can update records by clicking the 'Update' link on the List and 'Update' button on the detail page the user will be directed to the 'Edit Case Details' page. Since the roles are additive a user that can update company cases can also view company cases, view/update own cases.

## Sorting

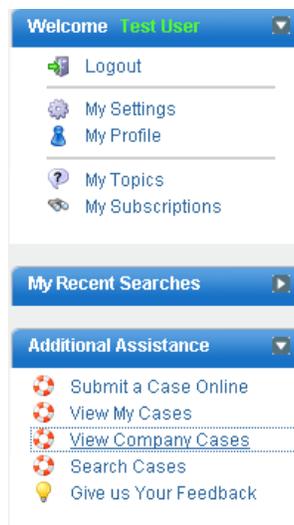
By default, the records are sorted in descending order by Case Number. Users can sort the records by #(Case Number), Problem Summary, Priority, Status, Contact and Last Updated. Note that sorting will sort the complete result set rather than sorting the list of records on the current page. So if the user clicks on Sort when on a second page, the application will sort and restart case list from the first page

## Pagination

If the number of cases exceeds the limit set by 'Records per page', the results will be paginated. User can navigate using 'Previous' and 'Next' buttons. If there are additional pages, the 'Next' button will be rendered blue and if there are no additional pages the 'Next' button will be grayed out. The 'Previous' button is grayed out if there is nothing to navigate back to and will be rendered blue if there are pages that users can navigate back to.

## WALK-THRU

Click on the 'View Company Cases' link under Additional Assistance section in the home page.



By default, latest 10 cases will be shown (Sorted by Case # in descending order)

## View Company Cases

Previous Next

**My Company Cases**

View  All Cases  Open Cases  Closed Cases Records per page 10

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-235386389	First Test Case for Time Zone Support	1-ASAP	Open	vsaini@serenecorp.com	02-12-2010 12:20 PM	<a href="#">View</a>
480430-231882082	New Service Request Created from Mumbai	3-Medium	Open	externaluser.mike@gmail.com	02-12-2010 12:21 PM	<a href="#">View</a>
480430-230597951	Test	3-Medium	Open	externaluser.mike@gmail.com	02-12-2010 05:55 PM	<a href="#">View</a>
480430-230596862	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230594036	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230589011	Test	1-ASAP	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230563859	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230563651	Test	1-ASAP	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230563533	Test	1-ASAP	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230558442	Test	1-ASAP	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>

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To view only Open Cases, click on the 'Open Cases' radio button

## View Company Cases

Previous Next

**My Company Cases**

View  All Cases  Open Cases  Closed Cases Records per page 5

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-235386389	First Test Case for Time Zone Support	1-ASAP	Open	vsaini@serenecorp.com	02-12-2010 12:20 PM	<a href="#">View</a>
480430-231882082	New Service Request Created from Mumbai	3-Medium	Open	externaluser.mike@gmail.com	02-12-2010 12:21 PM	<a href="#">View</a>
480430-230597951	Test	3-Medium	Open	externaluser.mike@gmail.com	02-12-2010 05:55 PM	<a href="#">View</a>
480430-230596862	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>
480430-230594036	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	<a href="#">View</a>

Previous Page 1 of 11 Next

To view only 'Closed Cases', click on the 'Closed Cases' radio button

## View Company Cases

Previous Next

**My Company Cases**

View  All Cases  Open Cases  Closed Cases Records per page 5

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-226522179	New Case	1-ASAP	Closed		01-11-2010 09:30 AM	<a href="#">View</a>

To limit the number of cases presented at a time, user can change value of 'Records per page' dropdown. The allowed values are 2, 5 and 10.

If the users have company case update capability, they will be able to update open cases.

In addition to the View link, the user will also see an 'Update' link. Clicking on the update link will take the user the Edit Case Detail page.

Additionally user can also assign himself/herself as a contact if the case belongs to somebody else by clicking the 'Make me Contact' checkbox.

## WALK-THRU

### View Company Cases

Previous							Next	
My Company Cases								
View <input checked="" type="radio"/> All Cases <input type="radio"/> Open Cases <input type="radio"/> Closed Cases						Records per page 5		
#	Problem Summary	Priority	Status	Contact	Last Updated	Action		
480430-235386389	First Test Case for Time Zone Support	1-ASAP	Open	vsaini@serenecorp.com	02-12-2010 12:20 PM	View   Update		
480430-231882082	New Service Request Created from Mumbai	3-Medium	Open	externaluser.mike@gmail.com	02-12-2010 12:21 PM	View   Update		
480430-230597951	Test	3-Medium	Open	externaluser.mike@gmail.com	02-12-2010 05:55 PM	View   Update		
480430-230596862	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	View   Update		
480430-230594036	Test	2-High	Open	raghubathini@gmail.com	02-12-2010 05:19 PM	View   Update		
Previous		Page 1 of 11					Next	

### Edit Case Details

User Information	
Case Details (* required field)	
Case Number	480430-230594036 <span style="float: right;">Status Open</span>
Priority	2-High
Area	Installation
Cause	Unclear Instructions
Problem Summary *	Test
Description *	Test Data
Attachments	<input type="text"/> <input type="button" value="Browse..."/>
Notes	
Topics	
Linked Answers	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Before: Case Belongs to a different user

### Edit Case Details

User Information			
Contact Name	Raghu Bathini	Last Updated	02-12-2010 05:19 PM
Contact Email Id	raghubathini@gmail.com	Case Owner	
	<input type="checkbox"/> Make me Contact		
Case Details (* required field)			
Case Number	480430-230596862	Status	Open
Priority	2-High		
Area	Installation		
Cause	Unclear Instructions		
Problem Summary *	Test		
Description *	This is New CRM ON Demand SSP Test21		
Attachments	<input type="text"/> Browse...		
Notes	▶		
Topics	▶		
Linked Answers	▶		
		Save	Cancel

Select the Make me Contact checkbox and click on 'Save' Button. The contact of the case is updated to the logged in user.

### Edit Case Details

User Information			
Contact Name	Test User	Last Updated	02-12-2010 05:19 PM
Contact Email Id	schakrapani@serenecorp.com	Case Owner	
	<input checked="" type="checkbox"/> Make me Contact		
Case Details (* required field)			
Case Number	480430-230596862	Status	Open
Priority	2-High		
Area	Installation		
Cause	Unclear Instructions		
Problem Summary *	Test		
Description *	This is New CRM ON Demand SSP Test21		
Attachments	<input type="text"/> Browse...		
Notes	▶		
Topics	▶		
Linked Answers	▶		
		Save	Cancel

## Search Cases

Users can search the cases by clicking on the 'Search Cases' link in the home page. Filter criteria can be used to limit the number of records that are displayed in the list. The criteria support wild card expressions without necessity to include special characters.

The screenshot shows a user interface with a search bar at the top left containing the text ': ID's?' and a 'Search' button. To the right is a user profile menu for 'Test User' with options: Logout, My Settings, My Profile, My Topics, and My Subscriptions. Below the search bar is a 'Popular Articles' section with a table:

ID	Title
FAQ2	How do i connect to CRMOD
FAQ3	What should i use to validate CRMOD Request in InQuira
FAQ4	Serene Implements CRM On Demand
FAQ1	How do i configure my sp100/

Below the table are sections for 'My Recent Searches' and 'Additional Assistance' with links like 'Submit a Case Online', 'View My Cases', 'Search Cases', and 'Give us Your Feedback'.

## Search Cases

The screenshot shows the 'Filter Criteria' section with input fields for Case Id, Case Summary, Contact, Priority (dropdown), and Case Status (dropdown). There are 'Search' and 'Clear' buttons. Below this are 'Previous' and 'Next' navigation buttons. The 'Search results' section shows radio buttons for 'All Cases', 'Open Cases', and 'Closed Cases', and a 'Records per page' dropdown set to 10. Below is a table of search results:

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237963383	InQuira knowledge database is down	3-Medium	Open	schakrapani@serenecorp.com	02-09-2010 01:27 PM	View
480430-237853468	iConnect not working	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:43 AM	View
480430-237853146	I am unable to setup SSO for iConnect	1-ASAP	Closed	schakrapani@serenecorp.com	02-09-2010 03:42 AM	View

Example: searching for a Case that contains the numbers '963' in the Case Id

## Search Cases

**Filter Criteria**

Case Id  Case Summary

Contact  Priority  Case Status

**Search results**

View  All Cases  Open Cases  Closed Cases Records per page

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237963383	Inquire knowledge database is down	3-Medium	Open	schakrapani@serenecorp.com	02-09-2010 01:27 PM	<a href="#">View</a>   <a href="#">Update</a>

Example: search for a Case that contains the word 'sso' in its Case Summary

## Search Cases

**Filter Criteria**

Case Id  Case Summary

Contact  Priority  Case Status

**Search results**

View  All Cases  Open Cases  Closed Cases Records per page

#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237853146	I am unable to setup SSO for iConnect	1-ASAP	Closed	schakrapani@serenecorp.com	02-09-2010 03:42 AM	<a href="#">View</a>   <a href="#">Update</a>
480430-237850023	SSO Setup has no images	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:34 AM	<a href="#">View</a>   <a href="#">Update</a>

Example: Search result if no case exists that satisfy the given criteria

## Search Cases

**Filter Criteria**

Case Id  Case Summary

Contact  Priority  Case Status

**Search results**

View  All Cases  Open Cases  Closed Cases Records per page

No Case found

## View / Update Case Detail

Users can view case information if they own the case; similarly users can update case information if they own the case and in addition have access to update own cases. From the view page, users can post case as topic to the community; they can find answers from the knowledge base from the case context

User can update records by clicking the 'Update' link on the List and 'Update' button on the detail page the user will be directed to the 'Edit Case Details' page.

Example: User with no update access

## View Case Details

Case Information	
Case Number	480430-241734357
Status	Open
Last Updated	02-28-2010 11:45 PM
Case Owner	
More Information	
Priority	1-ASAP
Contact Name	Test User
Area	Installation
Cause	Unclear Instructions
Problem Summary	Test Case 1
Description	Test Case 1 Description
Attachments	
Notes	
Topics	
Linked Answers	
<input type="button" value="Post as Topic"/> <input type="button" value="Search Answer"/> <input type="button" value="Cancel"/>	

Example: User with update access

## View Case Details

Case Information	
Case Number	480430-241734357
Status	Open
Last Updated	02-28-2010 11:45 PM
Case Owner	
More Information	
Priority	1-ASAP
Contact Name	Test User
Area	Installation
Cause	Unclear Instructions
Problem Summary	Test Case 1
Description	Test Case 1 Description
Attachments	
Notes	
Topics	
Linked Answers	
<input type="button" value="Post as Topic"/> <input type="button" value="Search Answer"/> <input type="button" value="Update"/> <input type="button" value="Cancel"/>	

User can update fields allowed by the administrator

## Edit Case Details

User Information	
Case Details (* required field)	
Case Number	480430-241734357
Status	Open
Priority	1-ASAP
Area	Installation
Cause	Unclear Instructions
Problem Summary *	Test Case 1
Description *	Test Case 1 Description
Attachments	<input type="text"/> Browse...
Notes	
No notes found, Add New	
<input type="text"/>	<input type="text"/>
Topics	
Linked Answers	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Based on the specific configuration of the application, users may or may not update notes if the case is closed or cancelled.

## Edit Case Details

User Information	
Contact Name	Test User
Contact Email Id	schakrapani@serenecorp.com
Last Updated	02-28-2010 11:45 PM
Case Owner	
Case Details (* required field)	
Case Number	480430-241734357
Status	Closed
Priority	1-ASAP
Area	Installation
Cause	Unclear Instructions
Problem Summary *	Test Case 1
Description *	Test Case 1 Description
Attachments	<input type="text"/> Browse...
Notes	
No notes found, Add New	
Updating Notes	On a closed case
Topics	
Linked Answers	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

## Post Topic to Community

Users can post the case as a topic to the community from a self service case context. User may track the topic to verify if the community responded to the topic with a possible solution.

To post a topic, click the "Post as Topic" button in the 'View Case Details' page. This will open a window where the user can select a category under a discussion board.

Clicking on a category will navigate to another page where user can click on the 'Post New Topic' link.

Clicking the 'Post New Topic' link will navigate to another page with the Subject of topic pre-populated with the Problem Summary of the case in context. User will need to provide additional information under the 'Message' editor. By default, the topic is considered as a 'Normal Topic'; user may change the topic as a 'Question Topic' and click on 'Post Topic'.

Once users post their message, it will take them back to list of topics. Additionally, the parent window of the browser is refreshed if the topic was successfully posted. The topic section in the View Case Details' will allow users to see any responses made to their topic.

### WALK-THRU

- 1 Click on 'Post as topic'

#### View Case Details

<b>Case Information</b>		▶
<b>More Information</b>		▼
<b>Priority</b>	1-ASAP	
<b>Contact Name</b>	Test User	
<b>Area</b>	Installation	
<b>Cause</b>	Unclear Instructions	
<b>Problem Summary</b>	SSO Setup has no images	
<b>Description</b>	The iConnect SSO Setup guide has no images	
<b>Attachments</b>	<a href="#">How to use and test SSO.doc</a>	
<b>Notes</b>		▶
<b>Topics</b>		▶
<b>Linked Answers</b>		▶
		<input type="button" value="Post as Topic"/> <input type="button" value="Find Answers"/> <input type="button" value="Update"/> <input type="button" value="Cancel"/>
<b>Find Answers</b>		▶

- 2 Confirm the selection when the application prompts

## View Case Details

The screenshot shows a web application interface for viewing case details. A modal dialog box is overlaid on the page, asking for confirmation to post the case to the community. The dialog box has a blue header with the text "The page at http://psv2:9226 says:" and a question mark icon. The main text of the dialog says "Are you sure you want to post case to the community?". There are two buttons: "OK" and "Cancel".

Case Information	
<b>More Information</b>	
Priority	1-ASAP
Contact Name	Test User
Area	Installation
Cause	Unclear Instructions
Problem Summary	SSO Setup has no images
Description	The iConnect SSO Setup guide has no images
Attachments	<a href="#">How to use and test SSO.doc</a>
<b>Notes</b>	
<b>Topics</b>	
<b>Linked Answers</b>	
<input type="button" value="Post as Topic"/> <input type="button" value="Find Answers"/> <input type="button" value="Update"/> <input type="button" value="Cancel"/>	
<b>Find Answers</b>	

- 3 Select a Category under a discussion forum

The screenshot shows the InQIRA InfoCenter Discussions page. The browser title is "InQIRA InfoCenter - Discussions - Mozilla Firefox". The address bar shows the URL: "http://psv2:9226/ssp/index?page=forums&isSSP=Y&strCase=480430-237850023&strCaseDesc=SSO+Set". The page header includes the InQIRA logo and "Information Center". The breadcrumb trail is "Home > Discussions". The main heading is "Discussions". Below the heading, there is a paragraph: "Our discussion forums are filled with thousands of users from around the world. Search for an answer, post your question, or answer other users' questions in our Discussions community." There are two main categories: "Integration Issues" and "SSP Defects". Under "Integration Issues", there is a sub-category "Hardware". Under "SSP Defects", there is a sub-category "Accessories". The footer of the page reads: "InQIRA Information Center Copyright © 2010 , InQIRA Inc. , All Rights Reserved".

- 4 Click on Post New Topic link

## Discussions

Category: Hardware

[← Back](#) [Post New Topic](#)

Available forums in category:

Forum	Views	Topics	Comments	Last Post
<input type="radio"/> Inquire Forum	355	48	15	4 days ago by: Test User
<input checked="" type="radio"/> Server Issues	175	34	9	32 days ago by: Console User Test

Recent topics in category: **Hardware**

Topic	Views	Comments	Authored	Last Post
<input type="radio"/> <input type="checkbox"/> iConnect not working	1	0	4 days ago by: Test User	None

Pages: 9 - [ 1 2 3 4 5 ... 9 ]  
 Topics: 82

- 5 Subject is pre-populated with Case 'problem summary'. Enter detailed description for the topic under 'Message' editor and click on 'Post Topic'

## Post New Topic

Type your message using the form below. When finished, click the "Post Topic" button to submit your topic immediately.

[← Back to answers](#)

**Post Topic**

**Forum**

**Subject**

**Message**

Source **B** *I* U **abc** **x<sub>1</sub>** **x<sub>2</sub>**

Please help with this issue.

**Topic Type** Mark this topic as a question - this encourages people to answer for points and helps you track answers.

**Case Number:**

- 6 Close the window. The 'View Case Details' page should list the newly posted topic.

## View Case Details

<b>Case Information</b>			
<b>More Information</b>			
<b>Priority</b>	1-ASAP		
<b>Contact Name</b>	Test User		
<b>Area</b>	Installation		
<b>Cause</b>	Unclear Instructions		
<b>Problem Summary</b>	SSO Setup has no images		
<b>Description</b>	The iConnect SSO Setup guide has no images		
<b>Attachments</b>	<a href="#">How to use and test SSO.doc</a>		
<b>Notes</b>			
<b>Subject</b>	<b>Description</b>	<b>Last Updated</b>	
Agent Response	Images Not Required	02-08-2010 02:11 PM	
<b>Topics</b>			
<b>Topic</b>	<b>Views</b>	<b>Comments</b>	<b>Authored</b>
<a href="#">SSO Setup has no images</a>	0	0	9 seconds ago
<b>Linked Answers</b>			
<input type="button" value="Post as Topic"/> <input type="button" value="Find Answers"/> <input type="button" value="Update"/> <input type="button" value="Cancel"/>			

# Outages

If the system is down due to planned or unplanned outages, users may not be able to register, may not be able to access Case Management capabilities even though user may be able to login into the Self Service portal.

Error messages user may see during registration:-



The screenshot shows the INQUIRA Information Center registration page. The header includes the INQUIRA logo and navigation links for Home, FAQs, and Discussions. The breadcrumb trail is Home > Registration. The main heading is "New User Registration". A red error message box with a white 'X' icon contains the text: "We are experiencing some technical problems processing your request. Please try again after some time." Below the error message, a note states: "Use the form below to edit your profile and settings. All fields are required." The form is titled "Account Information" and contains the following fields: "User ID:" with the value "testuser\_7777", "First Name:" with the value "Test", "Last Name:" with the value "User", and "Display Name to Public:" with an unchecked checkbox.

Error messages user may see in the portal after login or during case management operations:-



The screenshot shows the INQUIRA Information Center portal with a red error message box. The header includes the INQUIRA logo and navigation links for Home, FAQs, and Discussions. The error message box contains the text: "We are experiencing some technical problems. Please try again after some time. If the problem persists, please contact customer support." Below the error message, the text reads: "InQuira Customer Support Hotline: (888) 947-8324" and "We accept Priority 1 requests exclusively through the Customer Support Hotline." At the bottom of the error message box, there is a link that says "Click here to try again".