ORACLE®

RIGHTNOW CX
CLOUD SERVICE

Accessibility Interface Guide

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Chapter 1

Getting Started

The industry-leading customer service and support solution from Oracle RightNow CX Cloud Service (Service) delivers valuable, consistent customer experiences across multiple customer service channels. Using this solution, you can provide your customers with fast and accurate answers from phone, email, and web requests. Having this knowledge at your fingertips lets you quickly and consistently help customers, while the product lets your customers help themselves with powerful and intuitive web self-service capabilities.

The accessibility interface is a non-graphical interface that lets you add and edit incidents, answers, contacts, and organizations. The interface is accessible through keystroke functionality, screen magnification, and the ability to be read aloud by screen reading software.

For current information regarding our approach to accessibility, refer to the Oracle accessibility program.

In this chapter

- Logging in to Service—Contains the procedure to log in.
- Working on the Session Console—Provides an overview of the Session Console and contains the procedures to open the Support Console and Answer Console, change your password, review and delete messages, and log out of Service.

Logging in to Service

Once you have a staff account, you are ready to get to work. When you type the URL to your site, the application opens a window where you can enter your login information.

Important: Your workstation must be configured to allow your browser to accept cookies or you will not be able to log in to the accessibility interface.

There are some things you should know before you log in for the first time. Your login has been assigned in your staff account. Passwords are optional, but your organization may require them. If so, your administrator also defined your password in your staff account. Both the login and password are case sensitive.

Also, your organization's security policies may require a different way of accessing the login window than the way described in the following procedure. In that case, use the steps provided by your administrator to open the Login window and start the procedure at step 2.

Important: The configuration setting MOD_TC_ENABLED must be set to its default value of Yes. If it is set to No, you will receive an Access Denied message.

To log in to Service

1 Open your web browser and type the following URL.

https://your_site.custhelp.com/cgi-bin/your_interface.cfg/php/admin/session/login.php

The Login window opens with the cursor in the Login field.

2 Type your login in the Login field.

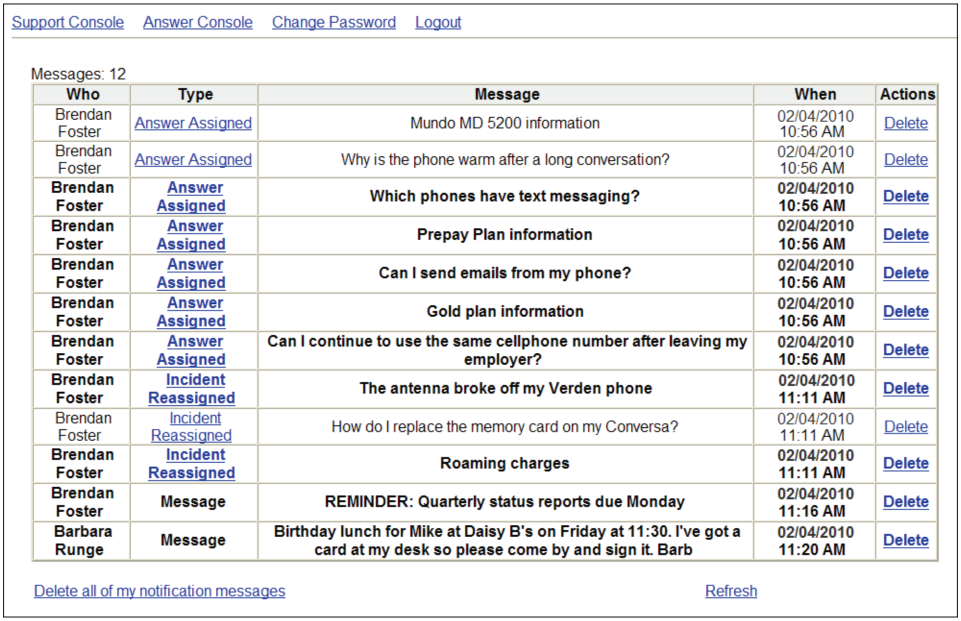
3 If you have been assigned a password, tab to the Password field and type it.

4 Tab to Login and press **Enter.** The Session Console opens.

Now you are ready to begin working.

Working on the Session Console

When you first log in to Service, the Session Console opens. Across the top of the screen are links for Support Console, Answer Console, Change Password, and Logout. The Session Console provides a list of your messages. Each message row contains the name of the person who sent the message, the type of message it is, the message content, and when it was sent. The list of messages also contains an Actions column that lets you delete individual messages.



Messages: 12

Who	Type	Message	When	Actions
Brendan Foster	Answer Assigned	Mundo MD 5200 information	02/04/2010 10:56 AM	Delete
Brendan Foster	Answer Assigned	Why is the phone warm after a long conversation?	02/04/2010 10:56 AM	Delete
Brendan Foster	**Answer Assigned**	**Which phones have text messaging?**	**02/04/2010 10:56 AM**	**Delete**
Brendan Foster	**Answer Assigned**	**Prepay Plan information**	**02/04/2010 10:56 AM**	**Delete**
Brendan Foster	**Answer Assigned**	**Can I send emails from my phone?**	**02/04/2010 10:56 AM**	**Delete**
Brendan Foster	**Answer Assigned**	**Gold plan information**	**02/04/2010 10:56 AM**	**Delete**
Brendan Foster	**Answer Assigned**	**Can I continue to use the same cellphone number after leaving my employer?**	**02/04/2010 10:56 AM**	**Delete**
Brendan Foster	**Incident Reassigned**	**The antenna broke off my Verden phone**	**02/04/2010 11:11 AM**	**Delete**
Brendan Foster	Incident Reassigned	How do I replace the memory card on my Conversa?	02/04/2010 11:11 AM	Delete
Brendan Foster	**Incident Reassigned**	**Roaming charges**	**02/04/2010 11:11 AM**	**Delete**
Brendan Foster	**Message**	**REMINDER: Quarterly status reports due Monday**	**02/04/2010 11:16 AM**	**Delete**
Barbara Runge	**Message**	**Birthday lunch for Mike at Daisy B's on Friday at 11:30. I've got a card at my desk so please come by and sign it. Barb**	**02/04/2010 11:20 AM**	**Delete**

To navigate the Session Console and the rest of the interface, you can tab through the options until you reach the one you want or you can use key combinations to select them directly. After you select an option by pressing **Tab** or an **Alt+key** combination, press **Enter** to perform the action. Where key combinations are available, this guide uses them in the procedures.

Important: If the system detects no activity for one hour, you will be logged out. In the five minutes prior to expiration, you will be prompted that your session is about to expire and offered the opportunity to stay logged in.

Refer to the following sections for actions you can take on the Session Console.

- To open the Support Console
- To open the Answer Console
- To change your password
- To review messages
- To delete messages
- To log out of the Session Console

To open the Support Console

Press **Alt+s** and then **Enter** to open the Support Console, where you can respond to your customers' questions and add and edit customer information. For information about working on the Support Console, refer to the Contacts and Organizations and Incidents chapters.

To open the Answer Console

Press **Alt+a** and then **Enter** to open the Answer Console, where you can add, edit, and manage the answers published on your customer portal. For information about working on the Answer Console, refer to Answers.

To change your password

1. Press **Alt+p** and then **Enter** to open the Change Password window. The window opens with the cursor in the Current Password field and contains a description of the password requirements.
2. Type your current password.
3. Tab to the New Password field and type your new password.
4. Tab to the Confirm New Password field and retype your new password.
5. Press **Alt+p** and then **Enter** to submit your changed password. A message lets you know the change was successful. Press **Enter** to close the message and the Change Password window.

To review messages

1. Tab to the row containing the message you want to open. Typical messages include answer and incident assignments, although there may be other automatic messages as well as notifications from staff members.
2. Tab to the Type column for the message and press **Enter.** The Type column contains a link that lets you open the record. If the message is about an incident, selecting the link opens the incident on the Support Console.
3. If the message is not related to an incident or answer, the Type column does not contain a link and the Message field contains the entire message.

To delete messages

1 To delete a single message, tab to the Delete link in the Actions column for the message and press **Enter.** A message asks you to confirm the deletion. Press **Enter** to close the confirmation message and delete the message.

2 To delete all messages, press **Alt+n** and then **Enter.** Press **Enter** again at the confirmation message.

To log out of the Session Console

Press **Alt+x** and then **Enter** to close the Session Console and log out. A message asks you to confirm that you want to leave. Press **Enter** to confirm, close the message, and log out.

Chapter 2

Contacts and Organizations

Customer data is the foundation of Oracle RightNow CX Cloud Service. It includes basic information such as a customer's name, email address, and phone number as well as information about customer service issues. The contact information you add and edit on the Support Console becomes part of your organization's knowledge base and is shared with all staff members. When customer information is kept current, the knowledge base provides complete information to your entire organization. The results make your job easier and provide a superior customer experience.

In this chapter

- Overview of contacts and organizations—Provides an overview of contacts, organizations, and contacts and organizations reports. Also included are procedures for opening and sorting a report and searching for contacts and organizations.
- Working with contacts and organizations—Contains procedures for adding and editing contacts and organizations, attaching files to organizations, deleting and printing contacts and organizations, and opening the audit log.

Overview of contacts and organizations

A contact is a customer with a record in your knowledge base. The record contains information about the customer, such as name, email address, physical address, phone numbers, and any other identifying information your organization collects about its customers. Contact records can be created by either customers or staff members. Customers can create a contact record when they enter information on your customer portal. Staff members can add or edit contact records on the Support Console.

An organization is any business entity that has an organization record in the knowledge base. Organization records contain the name, billing and shipping addresses, and login information. Organizations might be companies, divisions of companies, government agencies, educational institutions, or nonprofit associations, among others.

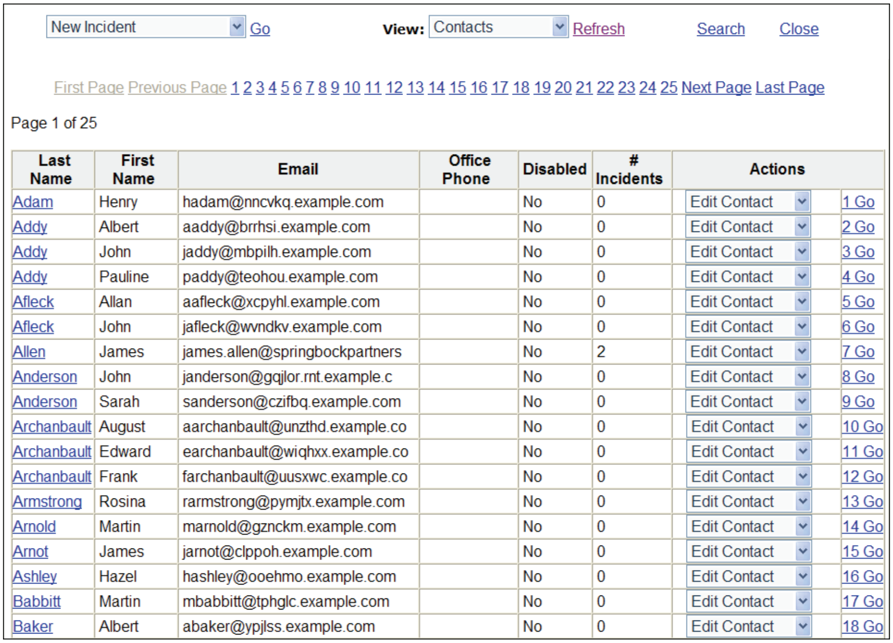
Your customers can be contacts or organizations or both. For example, assume you work for a cell phone company that sells to individual customers. In that case, all your customers have contact records. Because they are individuals, they are not associated with an organization.

On the other hand, maybe all your cell phone customers are businesses that provide phones for their employees. In that situation, your customers are the organizations, but the individual employees are the contacts associated with each organization. An organization can have an unlimited number of contacts, but a contact can be associated with only one organization.

Contacts and organizations reports

The Support Console contains the default report when you first open it, but you can change it to whatever contacts or organizations report you want. The View dropdown menu lists all the reports you can open. These reports have been defined by your administrator in the navigation set associated with the profile for your staff account. (The displayed reports are the ones selected for the Incidents navigation button.) Select any contacts or organizations report to list the data on the Support Console.

The information contained in a report depends on what report you opened and what fields and filters were defined when the report was created. The Contacts report, for example, includes the contact’s first and last names, email address, office phone, whether the contact record is disabled, and the number of incidents associated with the contact.


New Incident
Go
View:
Contacts
Refresh
Search
Close
First Page Previous Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 Next Page Last Page

Page 1 of 25

Last Name	First Name	Email	Office Phone	Disabled	# Incidents	Actions	
Adam	Henry	hadam@nncvkq.example.com		No	0	Edit Contact	1 Go
Addy	Albert	aaddy@brrhsi.example.com		No	0	Edit Contact	2 Go
Addy	John	jaddy@mbpilh.example.com		No	0	Edit Contact	3 Go
Addy	Pauline	paddy@teohou.example.com		No	0	Edit Contact	4 Go
Afleck	Allan	aafleck@xcpyhl.example.com		No	0	Edit Contact	5 Go
Afleck	John	jafleck@wvndkv.example.com		No	0	Edit Contact	6 Go
Allen	James	james.allen@springbockpartners		No	2	Edit Contact	7 Go
Anderson	John	janderson@gqjlor.rnt.example.c		No	0	Edit Contact	8 Go
Anderson	Sarah	sanderson@czifbq.example.com		No	0	Edit Contact	9 Go
Archanbault	August	aarchanbault@unzthd.example.co		No	0	Edit Contact	10 Go
Archanbault	Edward	earchanbault@wiqhxx.example.co		No	0	Edit Contact	11 Go
Archanbault	Frank	farchanbault@uusxwc.example.co		No	0	Edit Contact	12 Go
Armstrong	Rosina	rarmstrong@pymjtx.example.com		No	0	Edit Contact	13 Go
Arnold	Martin	marnold@gznckm.example.com		No	0	Edit Contact	14 Go
Arnot	James	jarnot@clppoh.example.com		No	0	Edit Contact	15 Go
Ashley	Hazel	hashley@ooehmo.example.com		No	0	Edit Contact	16 Go
Babbitt	Martin	mbabbitt@tphglc.example.com		No	0	Edit Contact	17 Go
Baker	Albert	abaker@ypjlss.example.com		No	0	Edit Contact	18 Go

The Organizations report lists the name of the organization and the number of contacts and incidents associated with it. If you select the number in the Contacts column, the list of contacts associated with the organization opens. Likewise, if you select the number in the Incidents column, the incidents associated with the organization opens.

All reports also contain an Actions column that lets you perform various actions, such as editing, deleting, or printing the record.

If the report contains more than one page, the number of pages is listed. Each time you move from one page to another, a message opens to let you know what page number you are on. Press **Enter** to close the message. Note: This message does not open in Internet Explorer 8.

- To select the first page, press **Alt+i** and then **Enter.**
- To select the previous page, press **Alt+p** and then **Enter.**
- To select the next page, press **Alt+z** and then **Enter.**
- To select the last page, press **Alt+l** and then **Enter.**

To open a contacts or organizations report

1. From the Session Console, press **Alt+s** and then **Enter** to open the Support Console. (If the default report that opens automatically on the console contains more than one page, a message lets you know how many pages are in the report. Press **Enter** to close the message.)
2. Tab to the View dropdown menu.
3. Use the up or down arrow key to select the contacts or organizations report you want to open.
4. Press **Alt+r** and then **Enter** to open the report you selected. Press **Enter** to close the message.

Many contacts and organizations reports have sorting options that let you sort records by name or other sort criteria, as defined in the report you selected. You can also specify whether the results should be arranged in ascending or descending order.

To sort a contacts or organizations report

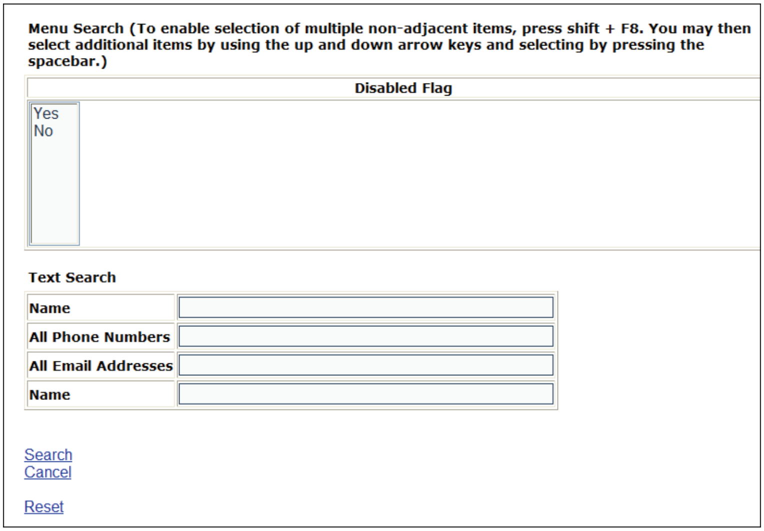
1. Tab to the Sort By dropdown menu at the bottom of the page.
2. Use the up or down arrow key to select a sorting option from the menu.
3. Tab to the Direction dropdown menu.
4. Use the up or down arrow key to select Ascending or Descending.
5. Press **Alt+o** and then **Enter** to sort the report.

Searching for contacts and organizations

If the report you have selected contains many records, you may want to search the report to find the contact or organization you want to open instead of tabbing through all of them. Different reports offer different search options. For example, if you select the Contacts report, you can search on the disabled flag, two name fields (where the first field is for the last name and the second field is for the first name), phone numbers, and email addresses.

To search for a contact or organization

1 Press **Alt+s** and then **Enter** to open the Search window.



Menu Search (To enable selection of multiple non-adjacent items, press shift + F8. You may then select additional items by using the up and down arrow keys and selecting by pressing the spacebar.)

Disabled Flag

Text Search

Name	
All Phone Numbers	
All Email Addresses	
Name	

2 Enter your search criteria. This may mean typing text in a field or making a selection from a menu. If you want to select multiple menu items, first press **Shift+F8.** Then use the up or down arrow key to move to each item you want to select and press the space bar.

3 When you have entered all search criteria, press **Alt+s** and then **Enter.** The Search window closes, and a message tells you how many matching records are returned. Press **Enter** to close the message. The Support Console lists all the records that match your search terms.

Working with contacts and organizations

When you work with incidents, you may find yourself adding and editing contacts and organizations. The Incidents chapter contains an overview of these procedures. You can also add and edit contacts and organizations as standalone records that are not associated with incidents. This section provides full details on adding and editing contacts and organizations regardless of whether they are associated with incidents.

Adding and editing contacts and organizations

The New Organization/Contact option on the Support Console opens the New Organization window first. After you save the organization information you enter, the New Contact window opens. If you want to add a contact that is not associated with any organization, you can select No Organization on the New Organization window to skip this window and open the New Contact window.

Adding and editing organizations

Because many staff members can have permission to add organizations, the organization you plan to add may already be in the knowledge base. To avoid duplicating organizations, search the knowledge base before adding an organization to be sure it does not already exist. Refer to To search for a contact or organization.

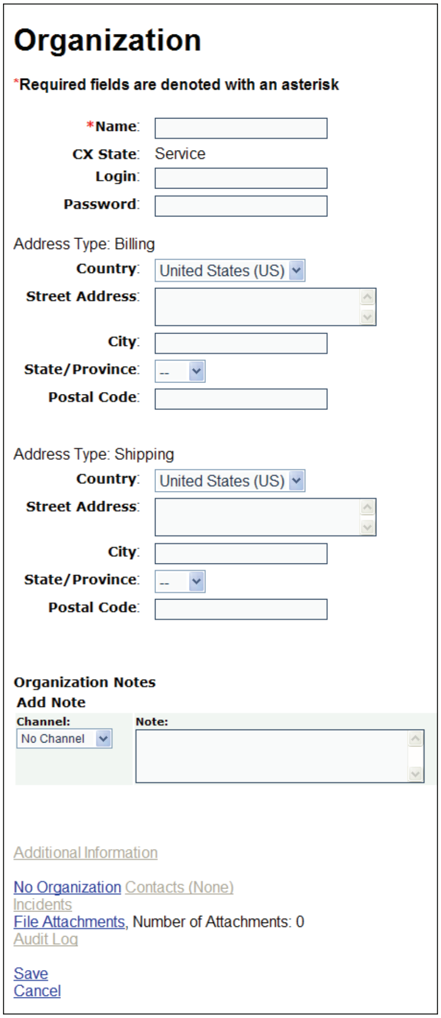
When you are adding an organization, several links on the editor are disabled because the organization has not yet been saved to the knowledge base. These links are Additional Information, Contacts, Incidents, and Audit Log. All of the links are enabled when you edit an existing organization that has contacts and incidents associated with it.

When you want to edit an existing organization, you can open it by first opening an organizations report on the Support Console and selecting it from the list of organizations. Or you can search for an organization using the procedure described in To search for a contact or organization.

The organization editor contains the CX State field, which cannot be edited. The default CX state for any organization you create is Service.

To add an organization

1. On the Support Console, tab to the New Incident dropdown menu and press the down arrow key to select New Organization/Contact.
2. Press **Alt+g** and then **Enter.** The New Organization window opens with the cursor in the Name field.



Organization

*Required fields are denoted with an asterisk

***Name**:	
CX State:	Service
Login:	
Password:	

Address Type: Billing

Country:	United States (US)
Street Address:	
City:	
State/Province:	--
Postal Code:	

Address Type: Shipping

Country:	United States (US)
Street Address:	
City:	
State/Province:	--
Postal Code:	

Organization Notes

Add Note

Channel:	Note:
No Channel	

Additional Information
No Organization Contacts (None)
Incidents
File Attachments, Number of Attachments: 0
Audit Log
Save
Cancel

3 This step is required. Type the organization's name in the Name field.

4 If contacts that belong to the organization will be required to log in to your customer portal using the organization's login, tab to the Login and Password fields and type the information.

5 Tab to the Country dropdown menu and use the up or down arrow key to select the country of the organization. The default value is United States. You can also type the first letter or first few letters of the country name.

6 Tab to the Street Address field and type the billing address in the field.

7 Tab to the City field and type the name of the city.

8 Tab to the State/Province dropdown menu and use the up or down arrow key to select the state. The menu options include the states or provinces associated with the country you selected. You can also type the state's abbreviation in the field or just the first letter of the state.

9 Tab to the Postal Code field and type the postal code.

10 If the shipping address is different from the billing address, tab to the following fields and complete them: Country, Street Address, City, State/Province, and Postal Code.

11 To specify the channel that tells how the organization information was received, tab to the Channel dropdown menu for the field and use the up or down arrow key to select an option.

12 Tab to the Note field and type any information about the organization you want to share with other staff members.

13 If your administrator has added organization custom fields, these fields come after the Organization Notes section. Depending on the type of custom field, you might select a date, type text in the field, or select a menu option or radio button.

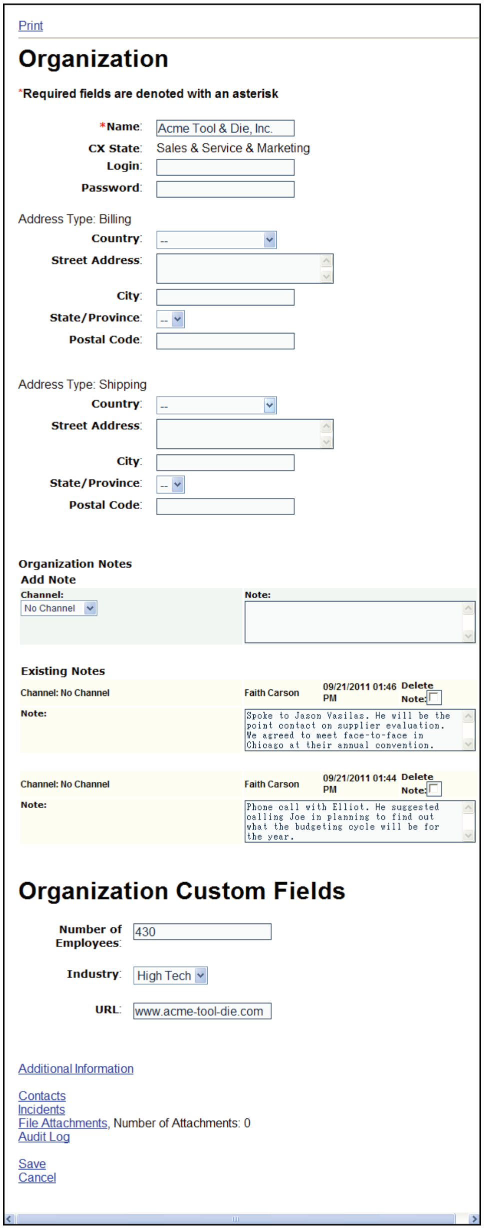
14 To attach one or more files to the organization, press **Alt+m** and then **Enter** to open the File Attachments window. Refer to Attaching files to organizations and contacts.

15 Press **Alt+s** and then **Enter** to close the New Organization window and open the New Contact window. Refer to Adding and editing contacts.

Important: Your organization information will not be saved unless you also add and save a contact.

To edit an organization

1 Open the organization you want to edit by tabbing to the name on an organizations report and pressing **Enter** or by searching for it as described in To search for a contact or organization.



Print

Organization

*Required fields are denoted with an asterisk

***Name**: Acme Tool & Die, Inc.
CX State: Sales & Service & Marketing
Login:
Password:

Address Type: Billing
Country: --
Street Address:
City:
State/Province: --
Postal Code:

Address Type: Shipping
Country: --
Street Address:
City:
State/Province: --
Postal Code:

Organization Notes
Add Note
Channel: No Channel
Note:

Existing Notes

Channel: No Channel	Faith Carson	09/21/2011 01:46 PM	Delete Note: ☐
Note:	Spoke to Jason Vasilas. He will be the point contact on supplier evaluation. We agreed to meet face-to-face in Chicago at their annual convention.		
Channel: No Channel	Faith Carson	09/21/2011 01:44 PM	Delete Note: ☐
Note:	Phone call with Elliot. He suggested calling Joe in planning to find out what the budgeting cycle will be for the year.		

Organization Custom Fields

Number of Employees: 430
Industry: High Tech
URL: www.acme-tool-die.com

Additional Information

Contacts
Incidents
File Attachments, Number of Attachments: 0
Audit Log

Save
Cancel

2 Tab through the organization fields until you get to the one you want to edit.

3 Edit the organization field.

4 To review additional information for the organization, including when it was created and updated, what rule state it is in, and the record ID, press **Alt+i** and then **Enter.** To close the Additional Information window, press **Alt+x** and then **Enter.**

5 To review the contacts associated with the organization, press **Alt+c** and then **Enter** to open a window that lists the contacts for the organization. Press **Alt+x** and then **Enter** to close the window.

6 To review the incidents associated with the organization, press **Alt+n** and then **Enter** to open a window that lists the incidents for the organization. Press **Alt+x** and then **Enter** to close the window.

7 Press **Alt+s** and then **Enter** to save your changes to the organization and close the Edit Organization window. A message lets you know that the organization has been updated. Press **Enter** to close the message.

Adding and editing contacts

Because many staff members can have permission to add contacts, the contact you plan to add may already be in the knowledge base. Or the customer might have created a contact record on your customer portal. To avoid duplicating contacts, search the knowledge base before adding a contact to be sure it does not already exist. Refer to To search for a contact or organization.

When you are adding a contact, the Additional Information link is disabled because the contact has not yet been saved to the knowledge base. This link is enabled when you edit an existing contact.

When you want to edit an existing contact, you can open it by first opening a contacts report on the Support Console and selecting it from the list of contacts. Or you can search for a contact using the procedure described in To search for a contact or organization.

The contact editor contains the CX State field, which cannot be edited. The default CX state for any contact you create is Service. The other field you cannot edit is Email Format, which indicates how the customer prefers to receive email from your organization. The default is Text HTML Multipart.

The steps for opening the New Contact window to add a contact are different depending on whether the contact you are adding is associated with an organization. You can also open the New Contact window to add a new contact to an existing organization.

To open the New Contact window for a contact that is associated with a new organization

Create an organization by following the procedure described in To add an organization. When you save the organization, the New Contact window opens.

To open the New Contact window for a contact with no organization association

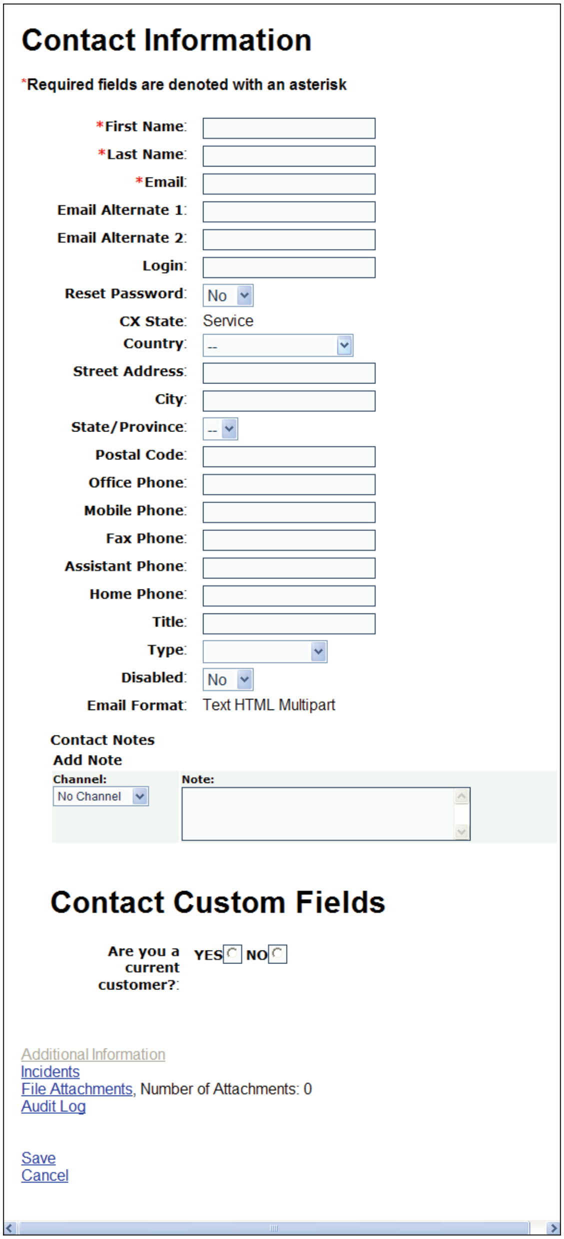
1. On the Support Console, tab to the New Incident dropdown menu and press the down arrow key to select New Organization/Contact.
2. Press **Alt+g** and then **Enter.** The New Organization window opens.
3. Press **Alt+o** and then **Enter** to indicate no organization association for a contact.
4. Press **Alt+s** and then **Enter** to open the New Contact window.

To open the New Contact window to add a new contact to an existing organization

1. On the Support Console, open an organizations report.
2. Tab to the organization you want to add a contact to.
3. Tab to the Actions column for that organization and press the down arrow key to select Add Contact.
4. Tab to Go in the Actions column for the selected organization and press **Enter.** The New Contact window opens.

To add a contact

1. Open the New Contact window using one of the preceding procedures. These include:
   - Adding a new contact to a new organization
   - Adding a new contact that does not belong to an organization
   - Adding a new contact to an existing organization



Contact Information

*Required fields are denoted with an asterisk

***First Name**:

***Last Name**:

***Email**:

Email Alternate 1:

Email Alternate 2:

Login:

Reset Password: No

CX State: Service

Country: --

Street Address:

City:

State/Province: --

Postal Code:

Office Phone:

Mobile Phone:

Fax Phone:

Assistant Phone:

Home Phone:

Title:

Type:

Disabled: No

Email Format: Text HTML Multipart

Contact Notes

Add Note

Channel: No Channel

Note:

Contact Custom Fields

Are you a current customer?: **YES** ○ **NO** ○

Additional Information
Incidents
File Attachments, Number of Attachments: 0
Audit Log

Save
Cancel

2 This step is required. Tab through the following fields and type the appropriate information in each field.

- First Name
- Last Name
- Email

Note: If you enter an email address that already exists in the knowledge base and email address sharing is enabled, you will receive a message that the email is a duplicate. Press **Enter** to create a new contact that shares the same email address (for example, another family member).

3 Tab through the following fields and type the appropriate information.

- Alternate email addresses: Email Alternate 1 and Email Alternate 2
- Login
- Street Address
- City
- Postal Code
- Phone numbers: Office Phone, Mobile Phone, Fax Phone, Assistant Phone, and Home Phone
- Title

4 There are five dropdown menus on the New Contact window. Tab to any one of the following menus and use the up or down arrow key to select an option.

- **Reset Password**—Select Yes to invalidate the contact's current password and send an email to the contact with a link to a page where the password can be reset.
- **Country**—Select the country for the contact's address.
- **State/Province**—Select the state or province for the contact's address.
- **Type**—Select an option to indicate contact type. The options in the Type menu were added by your administrator to meet the needs of your organization.
- **Disabled**—Select Yes to prevent the contact from being able to submit incidents or log in to the customer portal.

5 To specify the channel that tells how the contact information was received, tab to the Channel dropdown menu for the field and use the up or down arrow key to select an option.

6 Tab to the Note field and type any information about the contact you want to share with other staff members.

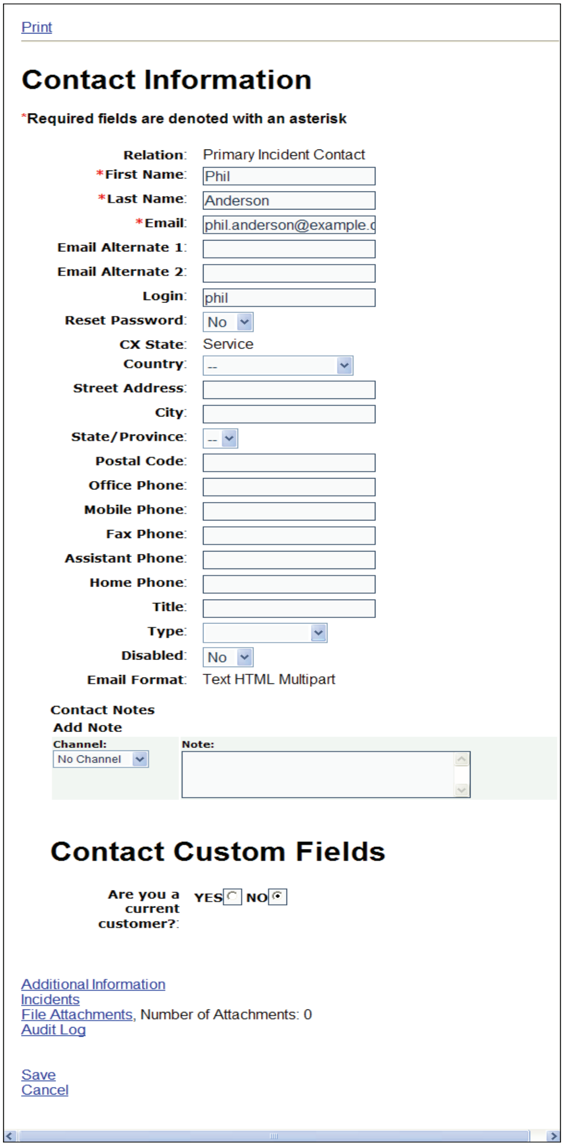
7 If your administrator has added contact custom fields, you can complete them on the New Contact window. Depending on the type of custom field, you might select a date, type text in the field, or select a menu option or radio button.

8 To attach one or more files to the contact, press **Alt+m** and then **Enter** to open the File Attachments window. Refer to Attaching files to organizations and contacts.

9 Press **Alt+s** and then **Enter** to save the contact information. A message lets you know that the organization and contact have been created. (Or if you selected No Organization on the New Organization window and added only a contact, the message tells you the contact has been created.) Press **Enter** to close the message and the New Contact window.

To edit a contact

1 Open the contact you want to edit by tabbing to the last name on a contacts report and pressing **Enter** or by searching for it as described in To search for a contact or organization.



Contact Information

*Required fields are denoted with an asterisk

Relation: Primary Incident Contact
***First Name:** Phil
***Last Name:** Anderson
***Email:** phil.anderson@example.c
Email Alternate 1:
Email Alternate 2:
Login: phil
Reset Password: No
CX State: Service
Country: --
Street Address:
City:
State/Province: --
Postal Code:
Office Phone:
Mobile Phone:
Fax Phone:
Assistant Phone:
Home Phone:
Title:
Type:
Disabled: No
Email Format: Text HTML Multipart

Contact Notes
Add Note
Channel: No Channel
Note:

Contact Custom Fields

Are you a current customer?: YES ○ NO ●

File Attachments, Number of Attachments: 0

2 Tab through the contact fields until you get to the one you want to edit.

3 Edit the contact field.

4 To review additional information for the contact, including when it was created and updated, what rule state it is in, and the record ID, press **Alt+i** and then **Enter.** To close the Additional Information window, press **Alt+x** and then **Enter.**

5 To review the incidents associated with the contact, press **Alt+n** and then **Enter** to open a window that lists the incidents for the contact. Press **Alt+x** and then **Enter** to close the window.

6 Press **Alt+s** and then **Enter** to save your changes to the contact. A message lets you know that the contact has been updated. Press **Enter** to close the message and the Edit Contact window.

Attaching files to organizations and contacts

You may want to add files to an organization or contact. Any files you attach become a permanent part of the record. When you open the File Attachments window, you can attach a file or find out what files are already attached, including the file name, display name, size, content type, and date created. From this window, you can also view the file and its properties, delete the attachment, and download the file.

To attach a file to an organization or contact

1 On an open organization or contact, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Press **Tab** to move to the Browse button and press **Enter.** Select the file or type its name in the File Name field, press **Tab** to move to the Open button, and press **Enter.**

3 Press **Alt+s** and then **Enter** to close the File Attachment window when you are done attaching files.

To open a file attached to an organization or contact

1 On an open organization or contact, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the View link in the Commands column of the file attachment you want to open and press **Enter.** The file opens in a separate window.

To view or edit the properties of a file attachment

1 On an open organization or contact, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Properties link in the Commands column of the file attachment you want to open and press **Enter.** The Edit File Attributes window opens.

3 To edit the file name, tab to the File Name field and type the new name.

4 To edit the display name, tab to the Display Name field and type the new name.

5 To add or edit a description for the file, tab to the Description field and make your edits.

6 Press **Alt+s** and then **Enter** to save your changes and close the Edit File Attributes window.

To delete a file attachment from an organization or contact

1 On an open organization or contact, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Delete link in the Commands column of the file attachment you want to delete and press **Enter.** You are asked to confirm that you want to delete the attachment. Press **Enter** to close the window and delete the attachment.

To download a file attached to an organization or contact

1 On an open organization or contact, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Download link in the Commands column of the file attachment you want to download and press **Enter.** The File Download window opens and asks if you want to open or save the file. Follow the prompts to download the file to the location you want.

Deleting contacts and organizations

When you delete a contact, you also delete any incidents associated with that contact. If you want to delete a contact without deleting an incident associated with the contact, you can first associate the incident with a different contact. Refer to To change the contact associated with an incident. When you delete an organization, you also delete all the contacts associated with the organization as well as all incidents associated with those contacts. Use caution when deleting contacts and organizations.

To delete a contact

1. Open a contacts report on the Support Console.
2. Tab to the contact you want to delete.
3. Tab to the Actions column for that contact and press the down arrow key to select Delete Contact.
4. Tab to Go in the Actions column for the selected contact and press **Enter.** A message asks you to confirm that you want to delete the contact.
5. Press **Enter** to confirm the deletion. A message opens to let you know the contact was deleted.
6. Press **Enter** to close the message.

The contact remains listed in the open contacts report until you refresh the report by pressing **Alt+r** and then **Enter.**

To delete an organization

1. Open an organizations report on the Support Console.
2. Tab to the organization you want to delete.
3. Tab to the Actions column for that organization and press the down arrow key twice to select Delete Organization.
4. Tab to Go in the Actions column for the selected organization and press **Enter.** A message asks you to confirm that you want to delete the organization.
5. Press **Enter** to confirm the deletion. A message opens to let you know the organization was deleted.
6. Press **Enter** to close the message.

The organization remains listed in the open organizations report until you refresh the report by pressing **Alt+r** and then **Enter.**

Printing contacts and organizations

You can print a contact or organization record when it is open. The Print link on the contact and organization editors is available only when an existing record is open, not when you are adding a new contact or organization.

To print an open contact or organization

1. With the contact or organization open, press **Alt+1** and then **Enter.** The record opens in a separate window.
2. Press **Alt, f, p** to open the Print window and then press **Enter** to print the record.
3. Press **Alt, f, x** to close the Print window and return to the open record.

Opening the audit log

When you work on a contact or organization, you might find it useful to know what actions have been taken on it. The audit log is a table with four columns and a row for each action taken on the contact or organization. The columns include date and time to indicate when the action was taken, who took the action, what the action was, and a description of the action.

To open the audit log

1. With the contact or organization open, press **Alt+l** and then **Enter.** The audit log opens.
2. To close the audit log, press **Alt+x** and then **Enter.**

Chapter 3

Incidents

When you work with customers to solve their support issues, you are instrumental in creating a positive impression of your organization. As an agent, you are often the customer's first point of contact, and it is important to resolve their concerns quickly and efficiently the first time. Oracle RightNow CX Cloud Service helps you do this by providing comprehensive, accurate, and current information about all aspects of the customer's communication with your organization's support team.

Besides providing you with information just when you need it, the application gives you the tools to craft consistent, accurate answers to customer questions.

In this chapter

- Overview of incidents—Provides an overview of incidents and a discussion about incidents reports, incident fields, the incident editor, and incident statuses. Also included are procedures to open and sort incidents reports, search for incidents, and fill your inbox.
- Adding and editing incidents—Provides an overview of the steps for working with incidents. This section contains all procedures to add or edit an incident, including adding content to your response, adding and editing contacts and organizations, attaching files to incidents, and sending responses.
- Managing incidents—Contains procedures to forward, delete, print, reassign, and requeue incidents and open the incident audit log.

Overview of incidents

When customers request help from your support team through email or the Ask a Question page on your customer portal, incidents are created automatically from their requests. Most of the time, these are the incidents you will respond to.

At other times, however, you will create incidents. For example, when a customer contacts you by phone, you will add an incident to create a record of the customer's question.

Your basic task when adding or editing incidents is to answer the customer's question. Standard text that you can insert into your response is one way that task is simplified. You can also use the answers in your organization's knowledge base to help your customers by inserting a link to an answer or the text of the answer itself.

Depending on the permissions assigned to the profile for your staff account, you may have access to a rich text editor with a WYSIWYG toolbar that lets you display, edit, and respond to HTML-formatted emails. The procedures in this chapter assume that you are using this feature.

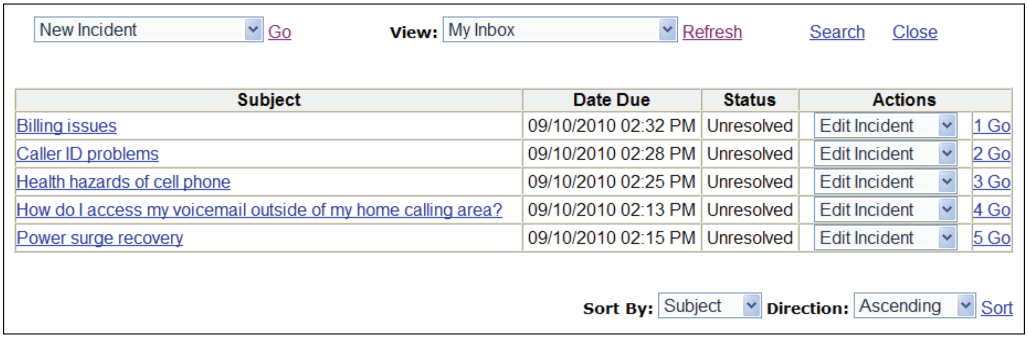
Part of completing an incident involves defining specific information about it, such as its status, products, categories, and disposition. Working with incidents also lets you add or update organization and contact information, attach files to the incident, and review all actions taken on the incident.

Incidents reports

The Support Console contains the default report when you first open it, but you can change it to whatever incidents report you want. The View dropdown menu lists all the reports you can open. These reports have been defined by your administrator in the navigation set associated with the profile for your staff account. (The displayed reports are the ones selected for the Incidents navigation button.) Select any incidents report to generate a list of incidents on the Support Console.

The incident information contained in the report depends on the report you opened and what fields and filters were defined when the report was created. The My Inbox report, for example, includes the incident's subject, the due date, and its status.

All reports also contain an Actions column that lets you perform various actions, including editing, deleting, or printing the incident.



View: My Inbox

Subject	Date Due	Status	Actions	
Billing issues	09/10/2010 02:32 PM	Unresolved	Edit Incident	1 Go
Caller ID problems	09/10/2010 02:28 PM	Unresolved	Edit Incident	2 Go
Health hazards of cell phone	09/10/2010 02:25 PM	Unresolved	Edit Incident	3 Go
How do I access my voicemail outside of my home calling area?	09/10/2010 02:13 PM	Unresolved	Edit Incident	4 Go
Power surge recovery	09/10/2010 02:15 PM	Unresolved	Edit Incident	5 Go

Sort By: Subject Direction: Ascending

If the report contains more than one page, the number of pages is listed. Each time you move from one page to another, a message opens to let you know what page number you are on. Press **Enter** to close the message. Note: This message does not open in Internet Explorer 8.

- To select the first page, press **Alt+i** and then **Enter.**
- To select the previous page, press **Alt+p** and then **Enter.**
- To select the next page, press **Alt+z** and then **Enter.**
- To select the last page, press **Alt+l** and then **Enter.**

To open an incidents report

1. From the Session Console, press **Alt+s** and then **Enter** to open the Support Console. (If the default report that opens automatically on the console contains more than one page, a message lets you know how many pages are in the report. Press **Enter** to close the message.)
2. Tab to the View dropdown menu.
3. Use the up or down arrow key to select the incidents report you want to open.
4. Press **Alt+r** and then **Enter** to refresh the previous report with the report you selected. A message lets you know how many pages are in the selected report. Press **Enter** to close the message.

Many incidents reports have sorting options that let you sort the incidents by reference number, assigned staff person, or other sort criteria, as defined in the report you selected. You can also specify whether the results should be arranged in ascending or descending order.

To sort an incidents report

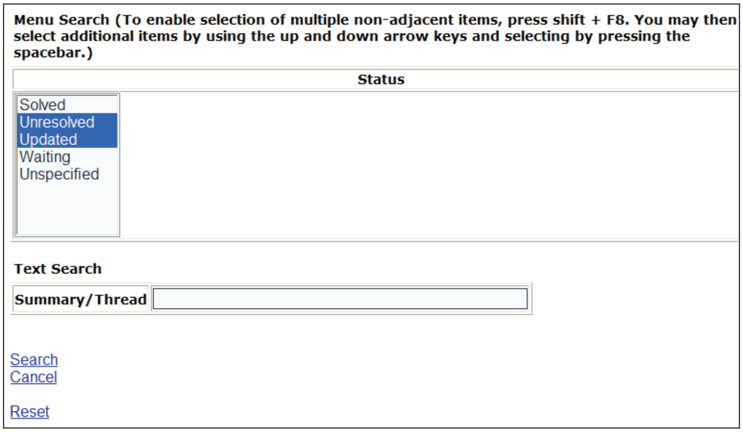
1. Tab to the Sort By dropdown menu at the bottom of the page.
2. Use the up or down arrow key to select a sorting option from the menu.
3. Tab to the Direction dropdown menu.
4. Use the up or down arrow key to select Ascending or Descending.
5. Press **Alt+o** and then **Enter** to sort the report.

Searching for incidents

If the report you have selected contains many incidents, you may want to search the report to find the one you want to open instead of tabbing through all of them. Different reports offer different search options. For example, if you select the Today's Incidents report, you can search on status type, source, assigned, date, thread, email, and contact name. However, the My Inbox report lets you search on only the summary and thread text.

To search for an incident

1. Press **Alt+s** and then **Enter** to open the Search window.



Menu Search (To enable selection of multiple non-adjacent items, press shift + F8. You may then select additional items by using the up and down arrow keys and selecting by pressing the spacebar.)

Status

Text Search

Summary/Thread

2. Enter your search criteria. This may mean typing text in a field or making a selection from a menu. If you want to select multiple menu items, first press **Shift+F8.** Then use the up or down arrow key to move to each item you want to select and press the space bar.

3 When you have entered all search criteria, press **Alt+s** and then **Enter.** The Search Window closes and the Support Console lists all incidents that match your search terms.

Filling your inbox

If your profile has been assigned incident queues, the Support Console contains an incident queue dropdown menu with a Fill Inbox link. This lets you move unassigned incidents into your inbox so you can work on them.

To fill your inbox

1 Tab to the Fill dropdown menu and use the up or down arrow key to select a queue you will pull incidents from.

2 Press **Alt+f** and then **Enter.** Your inbox now contains incidents from the queue you selected.

Incident fields

When you work on an incident, the window contains fields and menus that let you enter information about the incident. The main fields are the incident's subject and the discussion thread, which includes the customer entry, your response, and notes about the incident. The incident window also lists the reference number for the incident and contains a link to additional information, such as when it was created and last updated. Dropdown menus on the window let you select the incident's status, assigned staff person, queue, interface, language, mailbox, channel, and severity. You can also open product, category, and disposition trees to select these items for the incident.

Some fields are required by default, and your administrator may require others, including any custom incident information that your organization collects. You must complete all required fields before you can save the incident. If you do not, a message opens to tell you which field is required when you try to save the incident.

Incident editor

When you add an incident, the New Incident window opens. When you edit an existing incident, the Incident Edit window opens. Unless it is necessary to distinguish between the two windows, both are referred to as the incident editor in the following procedures.

The incident editor is a scrolling window that contains all the fields and menus necessary to complete an incident. Because it contains many fields, it is divided into sections. For ease of navigation, the top line of the editor contains links to the different sections. The sections and links include Incident Messages, Incident Information, and Incident Details. If your organization uses incident custom fields, there is a section and link for custom fields. The Incident Edit window also contains a link that lets you print incidents, but this link is not available on the New Incident window because the incident has not yet been saved.

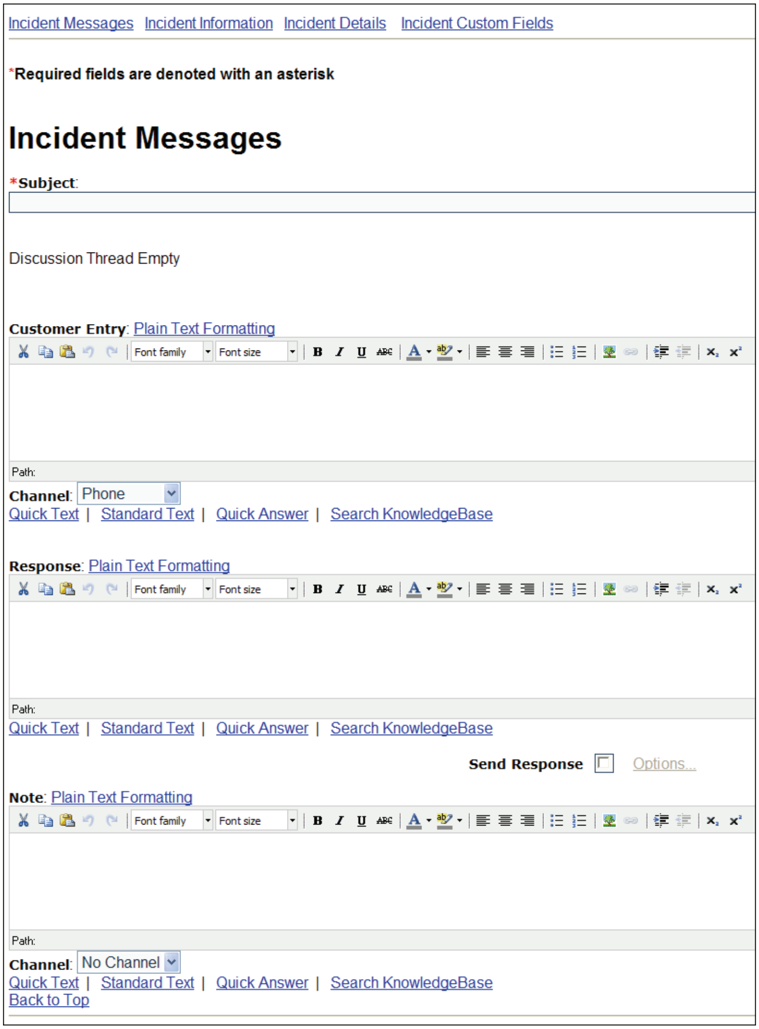
Every section of the incident editor contains a link to return to the top of the editor. Press **Alt+b** and then **Enter** to return to the top from any section of the editor.

Incident Messages section

The Incident Messages section of the incident editor contains the following fields, menus, and options.

- Subject field
- Discussion thread containing the past correspondence for the incident, with the most recent listed first
- Customer Entry field, including a channel dropdown menu and Quick Text, Standard Text, Quick Answer, and Search Knowledge Base links
- Response field, including Quick Text, Standard Text, Quick Answer, and Search Knowledge Base links, the Send Response selection, and a link to the Response Options window
- Note field, including a channel dropdown menu and Quick Text, Standard Text, Quick Answer, and Search Knowledge Base links

Note: The Customer Entry, Response, and Note fields include a WYSIWYG toolbar if your profile has the appropriate permission defined.


Incident Messages
Incident Information
Incident Details
Incident Custom Fields
Plain Text Formatting
Font family
Font size
Path:
Quick Text | Standard Text | Quick Answer | Search KnowledgeBase
Options...
Back to Top

*Required fields are denoted with an asterisk

Incident Messages

*Subject:

Discussion Thread Empty

Customer Entry:

Channel: Phone

Response:

Send Response ☐

Note:

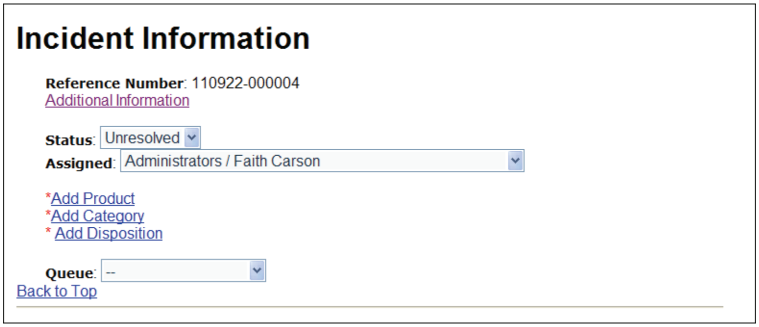
Channel: No Channel

Incident Information section

The Incident Information section of the incident editor contains the following fields, menus, and options.

- The incident's reference number that is assigned automatically and cannot be edited
- An Additional Information link that opens a window containing more information about the incident, including when it was created, updated, responded to, and closed, whether it is in any rule state or escalation level, and the record ID

- The Status dropdown menu. Refer to Understanding incident statuses.
- The Assigned dropdown menu
- Links to add and edit the incident's product, category, and disposition. On the New Incident window, the links are Add Product, Add Category, and Add Disposition. On the Incident Edit window, the links are View/Edit Product, View/Edit Category, and View/Edit Disposition. Selecting a link opens a window where you can add or change the product, category, or disposition for the incident.
- The Queue dropdown menu



Incident Information

Reference Number: 110922-000004

Status: Unresolved

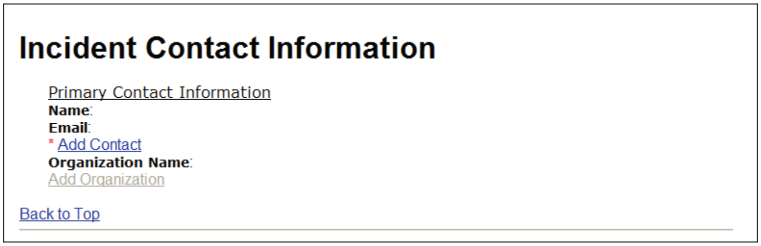
Assigned: Administrators / Faith Carson

Queue: --

Incident Contact Information

The Incident Contact Information section contains a section for contact information for the incident. The following links and information are available.

- The name and email of the contact for the incident
- An Add Contact link for adding a contact to a new incident or a View/Edit Contact link for changing the contact for an existing incident
- The organization name if the contact for the incident is associated with an organization
- An Add Organization link to add an organization to the incident or a View/Edit Organization link to edit the incident's organization information (A contact must be associated with the incident before this link is active.)



Incident Contact Information

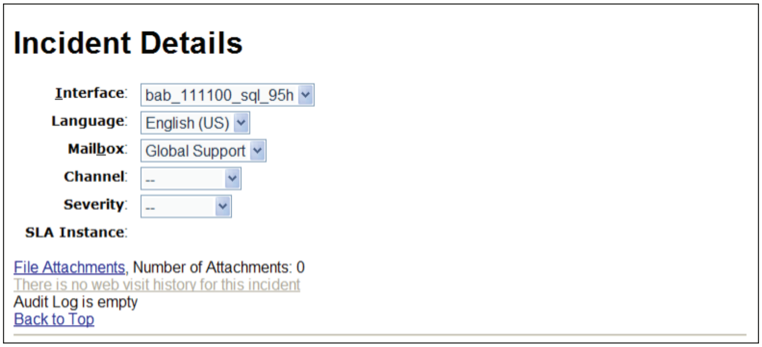
Primary Contact Information
Name:
Email:
* Add Contact
Organization Name:
Add Organization

Back to Top

Incident Details section

The Incident Details section of the incident editor contains the following fields, menus, and options.

- The Interface dropdown menu
- The Language dropdown menu
- The Mailbox dropdown menu
- The Channel dropdown menu
- The Severity dropdown menu
- A read-only field to display the SLA instance associated with the incident
- A File Attachments link with the number of attachments to the incident
- A Web Visit History link if it exists for the incident
- An Audit Log link that lists all the actions taken on the incident



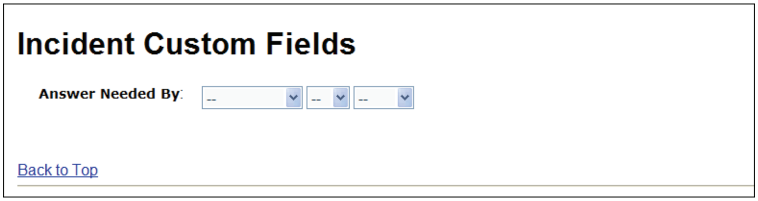
Incident Details

Interface: bab_111100_sql_95h
Language: English (US)
Mailbox: Global Support
Channel: --
Severity: --
SLA Instance:

File Attachments, Number of Attachments: 0
There is no web visit history for this incident
Audit Log is empty
Back to Top

Incident Custom Fields section

If your organization uses incident custom fields, the incident editor has an area specifically for them. Depending on the type of custom field, you complete them by selecting a date, typing text, or selecting a menu option or radio button.



Incident Custom Fields

Answer Needed By: -- -- --

Print link

The Print link is available on the Incident Edit window but not on the New Incident window. This link opens the incident in a separate window that provides a print command. Refer to Printing incidents.

Understanding incident statuses

One of the incident fields you must complete is the Status field. Incidents can have one of the four default incident statuses, or they may have a custom status defined by your administrator. The default statuses are Unresolved, Solved, Updated, and Waiting.

Depending on how the product has been configured, an incident's status can change automatically when you or the customer make changes. You can also change an incident's status manually.

The following example describes how an incident's status can change automatically.

Step 1—A customer submits a question from the Ask a Question page. The new incident has a status of Unresolved.

Step 2—The customer updates the question. The incident remains unresolved, but the incident status changes to Updated to reflect the customer's actions and alert you to the change.

Step 3—You edit the incident and send a response to the customer. Your system may be configured in one of the two following ways to automatically change the status, or it may be configured so that no status change occurs.

- The incident's status changes to Solved.

Important: Regardless of how your system is configured, the status of an incident automatically changes to Solved when the customer selects the check box marked "I no longer need an answer to this question" on the Update My Questions page or through the link in the email response. You will receive an incident notification.

- The incident's status changes to Waiting.

  The Waiting status signifies that you have sent a response and are waiting for the customer to let you know if this answers the question. If your system has this configuration and the customer does not respond within 48 hours, which is the default time, the system automatically changes the status to Solved and sends an email to the customer.

Adding and editing incidents

Incidents are generally submitted by customers from the Ask a Question page or through email. As a result, the majority of your time is probably spent editing incidents. Because incidents are automatically created from customer questions, existing incidents will already be populated with the subject, question, and contact fields when you open them.

However, incidents cannot be created automatically when customers contact you by phone, mail, or fax, so you must enter that information on the incident editor. When you add an incident, you create a record of both the customer's question and your response, which can help your organization track how the incident is resolved.

The following list provides an overview of the steps involved in adding and editing incidents. The sections that follow describe the procedures for each step in detail. Incident fields do not have to be completed in any particular order, but you must complete all required fields before you can save an incident.

- Add or edit customer entries, notes, and your response to the incident thread
- Add standardized content to your response
- Complete the incident fields
- Add or edit contact and organization information
- Attach files to the incident
- Send the response

You can complete an incident response in a single editing session, or you might find it useful to work on one part of the response and then return later to complete the rest of the incident.

Selecting the My Inbox report lists all the incidents that are assigned to you. As you respond to and solve incidents, their status changes to Solved or Waiting. You can continue to refresh the report to retrieve new unresolved incidents by pressing **Alt+r** and then **Enter.** You can also add incidents by following the procedure in To fill your inbox.

In the following procedures, assume that the My Inbox report is opened by default when you open the Support Console. If your Support Console does not open the incidents report you need, talk to your administrator about changing the configuration.

To open a new or existing incident

1 On the Session Console, press **Alt+s** and then **Enter** to open the Support Console.

2 To add an incident, press **Alt+g** and then **Enter** to open the New Incident window.

Or

To edit an incident, tab to the row containing the incident you want to select, tab to Go in the Actions column, and press **Enter.** The Incident Edit window opens.

Working on the incident thread

The thread is the sequence of activity that has occurred for the incident. It includes the customer's question and any updates they may have added, your response and any other staff member responses, and notes relating to the activity on the incident.

If the customer submits the question, the Customer Entry thread contains the information the customer submits. If the customer contacts you by phone, you must complete that field as well as the Response field and any notes you may want to add to the incident.

To add to the incident thread

1 This step is required. Type the subject of the new incident in the Subject field.

Or

To edit the existing subject, for example, to make it more specific, type your changes in the Subject field.

2 To add a new customer thread to the incident, tab to the Customer Entry field and type the customer's question or comments in the field.

Or

To add your response to the incident, tab to the Response field and type your response.

Or

To add a private note that can be accessed by other staff members but not by customers, tab to the Note field and type your note.

3 To specify the channel for a customer entry or note, tab to the Channel dropdown menu for the field and use the up or down arrow key to select an option.

4 To add standard text to any of the fields you added using the Quick Text option, press **Alt+k** and then **Enter.** You must know the hot key for the standard text item you want to insert before you can use this option. Refer to Appending Quick Text to incidents.

5 To add standard text to any of the fields you added using the Standard Text option, press **Alt+z** and then **Enter.** Refer to Appending Standard Text to incidents.

6 To add a link to an answer or the text of an answer to any of the fields you added, press **Alt+q** and then **Enter.** Refer to Adding a Quick Answer to incidents.

7 To search for answers that might help you respond to the customer's question, press **Alt+h** and then **Enter.** Refer to Searching the knowledge base.

Reviewing web visit history

As you prepare your response to the incident, you might find it helpful to know what information the customer viewed on the customer portal before submitting the question. When you are adding an incident, there is no history so this option is not available. But when you are editing an existing incident, you can open a window containing that information.

To access web visit information for an incident

On an open incident, press **Alt+e** and then **Enter.** The Web Visit History window opens and lists the pages the customer accessed on the customer portal before submitting the incident. (This option is not available for an incident you are creating because there has been no history.)

Adding content to your response

Several tools help you save time, eliminate mistakes, and provide consistent information to customers. These tools include the ability to insert standard, predefined text, answer links, and answer text into your response. You can also search the knowledge base for an answer so that you know the answer ID to specify for adding links or text to your response. Although the following procedures describe how to add content to the Response field, the procedures are the same if you want to add answer links, answer text, or standard text to the customer entry field or note.

Appending Quick Text to incidents

When you are busy responding to customers' questions, you will appreciate having the routine parts of your job streamlined as much as possible. For example, you would probably welcome a shortcut for typing a standard greeting and closing for every email response you send. Your administrator can create standard text for routine situations so you can insert a text item into a response.

Each standard text entry has an associated hot key. Your manager or administrator should be able to provide you with information about what standard text entries are available and let you know their associated hot keys.

You can insert standard text using the Quick Text link after the Response field.

To add Quick Text to an incident response

1. Open the incident, then tab to the Response field and type any text you want to add before you add the standard text.
2. Press **Alt+k** and then **Enter.** The Quick Text window opens.
3. Type the hot key that has been assigned to the standard text you want to enter.
4. Press **Alt+a** and then **Enter** to append the standard text to your response. A message notifies you that quick text has been added. Press **Enter** to close the message. The text is added to the incident response, and you can edit it before you send the response.

Appending Standard Text to incidents

Although you can add standard text to incidents using the Quick Text control, you might not know the hot key you need, or you might want to review different standard text entries before you decide which one you want to add to your response. You can use the Standard Text link when this is the case.

Selecting the Standard Text link opens the Standard Text window, where you can tab through the folders and entries. As you tab through individual entries, you can select either the name of the entry or its Preview link to preview the text or the Insert link to add it to your response.

If the entry is a folder that contains standard text entries, you can select the folder link to make the entries in that folder available on the Standard Text window.

To add Standard Text to an incident response

1. Open the incident, then tab to the Response field and type any text you want to add before you add the standard text.

2 Press **Alt+z** and then **Enter.** The Standard Text window opens.

3 Tab through the entries, where folders are identified to distinguish them from entries.

4 To open a folder, press **Enter** on the folder name, or tab to the Go action for the folder and press **Enter.** A message identifies the folder name. Press **Enter** to close the message. The Standard Text window now contains the contents of the folder.

5 To find a standard text entry in the list, tab to the Find in List field, type a search term, and press **Alt+f** and then **Enter.** The Standard Text window now contains the entries that match your search term.

6 To preview an entry, tab to the entry and press **Enter,** or tab to the Preview link in the Actions column and press **Enter.** A window containing the text opens so you can preview it. Press **Enter** again to close the window.

7 To add an entry to your response, tab to the entry's Insert link in the Actions column and press **Enter.** A message notifies you that standard text has been added. Press **Enter** to close the message. The text is added to the incident response, and you can edit it before you send the response.

8 To go up one level when the Standard Text window contains the contents of a folder, press **Alt+u** and then **Enter.**

9 To close the Standard Text window, press **Alt+x** and then **Enter.**

Adding a Quick Answer to incidents

The Quick Answer feature lets you enter an answer ID and then insert either a link to the answer or the actual text of the answer into your response.

To add a Quick Answer to an incident response

1 Open the incident, then tab to the Response field and type whatever text you want to add before you add answer information.

2 Press **Alt+q** and then **Enter.** The Quick Answer window opens.

3 Type the ID number of the answer you want to add.

4 To add an answer's URL link to your response, press **Alt+l** and then **Enter.** A message notifies you that the answer link has been added. Press **Enter** to close the message. The answer link is added to the Response field.

5 To add the text of an answer to your response, press **Alt+t** and then **Enter.** A message notifies you that the answer text has been added. Press **Enter** to close the message. The answer text is added to the Response field.

Searching the knowledge base

You can search the knowledge base for answers that meet specific criteria that you can then add to your response.

To search the knowledge base for an answer

1 Open the incident and tab to the Response field.

2 Press **Alt+h** and then **Enter.** The Search window opens.

3 Enter your search criteria. Depending on the field, this may mean typing text in a field or making a selection from a menu. If you want to select multiple menu items, first press **Shift+F8.** Then use the up or down arrow key to move to each item you want to select and press the space bar.

There are four ways to search for text within an answer.

- Select **Phrases** to match the phrase you enter.
- Select **Similar Phrases** to match answers containing synonyms and similarly spelled words as those you enter in the text field.
- Select **Exact Search** to match the exact sequence of the terms you type.
- Select **Complex Expression** to allow wildcard searching.

4 When you have entered all your search criteria, press **Alt+s** and then **Enter.** The Search window closes, and a message specifies the number of matching results (except in Internet Explorer 8). Press **Enter** to close the message and open the Search Results window. This window contains a list of the answers in the knowledge base that match your search criteria.

5 Tab through the answers. If you want to open an answer to verify it is the one you want before you add it to your response, tab to its summary and press **Enter.**

6 To add the answer to your response thread, tab to the Actions column for the answer, select the Add action, and press **Enter.** The Quick Answer window opens with the Answer ID field populated with the ID number for the answer you selected.

Note: The remainder of this procedure is the same as adding Quick Answers to your response when you already know the ID number of the answer.

7 To add an answer's URL link to your response, press **Alt+l** and then **Enter.** A message notifies you that the answer link has been added. Press **Enter** to close the message. The answer link is added to the Response field.

8 To add the text of an answer to your response, press **Alt+t** and then **Enter.** A message notifies you that the answer text has been added. Press **Enter** to close the message. The answer text is added to the Response field.

Formatting the incident thread

If your profile includes the appropriate permission, each of the Customer Entry, Response, and Note fields contains a WYSIWYG toolbar that lets you add rich text content to the incident thread. When you type your response to the customer's question, you can use the toolbar to:

- Cut, copy, paste, undo, and redo.
- Change font style, size, and attributes (bold, italic, underline, strikethrough, text color, highlight).
- Left-justify, center, or right-justify text and images on the page.
- Format text in bulleted or numbered lists.
- Insert links. Refer to To insert a hyperlink into an incident thread.
- Increase and decrease indents.
- Apply specialized formatting, including sub and super script.
- View plain text, which removes all HTML formatting.

Note: Although the toolbar contains an Insert an Image button, the ability to upload an image from your workstation is not available on the accessibility interface. You can insert and work with images you upload from a URL.

To insert a hyperlink into an incident thread

1 Type the text that will be the link you want to create in the Customer Entry, Response, or Note field.

2 Select the text you just typed.

3 Tab to the Insert a Link button and press **Enter.** The Insert/Edit Link window opens with the cursor in the Link URL field.

4 Type the URL for the link in the Link URL field.

5 Tab to the Target field and press the down arrow once to open the link in the same window. Press the down arrow twice to open the link in a new window.

6 Tab to the Title field and type the words of the link. You can type the same text that you typed in the field, or you can enter a different title.

7 Press **Enter** to close the window and create the link.

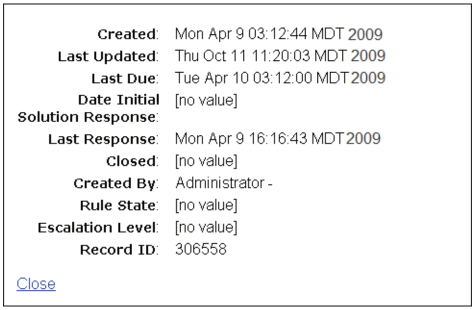
Completing the incident fields

The information you enter in the Customer Entry and Response fields is only part of working on an incident. You must also complete the incident fields. Remember that you can access these fields through the links at the top of the incident editor.

Completing incident information

The Incident Information link on the incident editor takes you to the part of the window where you can access information about the incident and enter menu options that will determine how the incident is categorized in your knowledge base.

The incident's reference number is listed in this section. This number is assigned automatically and cannot be edited. This section also contains a link to additional information about the incident, which you can access by pressing **Alt+i** and then **Enter.** It contains the date and time the incident was created, last updated, first responded to, last responded to, when it is due, and when it closed. The Additional Incident Information window also contains the name of the person who created the incident, whether it is in any rule state or escalation level, and its record ID. Press **Alt+x** and then **Enter** to close the window.



Created: Mon Apr 9 03:12:44 MDT 2009
Last Updated: Thu Oct 11 11:20:03 MDT 2009
Last Due: Tue Apr 10 03:12:00 MDT 2009
Date Initial Solution Response: [no value]
Last Response: Mon Apr 9 16:16:43 MDT 2009
Closed: [no value]
Created By: Administrator -
Rule State: [no value]
Escalation Level: [no value]
Record ID: 306558

To complete incident information

1 Open an incident and press **Alt+2** and then **Enter** to move to the Incident Information section of the window.

2 Tab to the Status dropdown menu and use the up or down arrow key to select from the available incident statuses, which include Unresolved, Solved, Updated, and Waiting, as well as any custom statuses used by your organization. Refer to Understanding incident statuses.

3 Tab to the Assigned dropdown menu. By default, the incident is assigned to you. If you want to change the assignment, use the up or down arrow key to select the staff member you want to reassign the incident to.

4 This step is required. Press **Alt+p** and then **Enter** to open the Product Hierarchy window and select the product to associate with the incident by tabbing through the products and pressing the space bar at your selection. If you select a subproduct, its parent products are also selected. When you are finished, press **Alt+s** and then **Enter** to close the Product Hierarchy window and return to the incident editor.

5 This step is required. Press **Alt+a** and then **Enter** to open the Category Hierarchy window and select the category to associate with the incident by tabbing through the categories and pressing the space bar at your selection. If you select a subcategory, its parent categories are also selected. When you are finished, press **Alt+s** and then **Enter** to close the Category Hierarchy window and return to the incident editor.

6 This step is required if you set the incident status to Solved. Press **Alt+n** and then **Enter** to open the Disposition Hierarchy window and select the disposition associated with the incident by tabbing through the dispositions and pressing the space bar at your selection. When you are finished, press **Alt+s** and then **Enter** to close the Disposition Hierarchy window and return to the incident editor.

7 If you need to move the incident to a different queue, tab to the Queue dropdown menu and use the up or down arrow key to select the incident queue.

Completing incident details

The Incident Details link on the incident editor takes you to the part of the window where you can change the interface, language, mailbox, channel, and severity for the incident, if necessary. These options usually do not need to be changed.

The Incident Details section also includes the following links.

- **File Attachments**—Refer to Attaching files to incidents.

- **Web Visit History**—Refer to Reviewing web visit history.
- **Audit Log**—Refer to Opening the audit log.

To complete incident details

1 On an open incident, press **Alt+3** and then **Enter** to move to the Incident Details section of the window.

2 To change the interface, tab to the Interface dropdown menu and use the up or down arrow key to select an option.

3 To change the language, tab to the Language dropdown menu and use the up or down arrow key to select an option.

4 To change the mailbox, tab to the Mailbox dropdown menu and use the up or down arrow key to select an option.

5 To change the channel, tab to the Channel dropdown menu and use the up or down arrow key to select an option.

6 To change the severity level, tab to the Severity dropdown menu and use the up or down arrow key to select an option.

Completing incident custom fields

If your administrator has added incident custom fields, you can complete them on the incident editor. To access the custom fields from an open incident, press **Alt+4** and then **Enter.** Complete the custom fields by selecting a date, typing text, or selecting a menu option or radio button.

Adding and editing contact information

Because incidents are created from customer questions, the contact information is usually present when you respond to an incident. Sometimes, however, you need to add or edit contact information. You cannot save the incident until it has an associated contact.

This section briefly describes how to add and edit contact information while you are working on an incident. For more detailed information about working with contacts, refer to the Contacts and Organizations chapter.

To add a new contact to a new incident

1 On a new incident, press **Alt+c** and then **Enter.** The New Contact window opens.

2 Type the contact's first name, last name, and email address.

3 Press **Alt+s** and then **Enter.** A message lets you know the contact will be updated when the incident is saved. Press **Enter** to close the message and the New Contact window.

To add an existing contact to a new incident

1 On a new incident, press **Alt+c** and then **Enter.** The New Contact window opens.

2 Press **Alt+a** and then **Enter** to associate the incident with an existing contact. The Contact Search window opens.

3 Type complete or partial information in any of the following search fields: Last Name, First Name, Phone Number, Email, and Postal Code.

4 Press **Alt+s** and then **Enter** to search the knowledge base for contacts that match the terms you typed.

5 If only one contact matches your search terms, a message lets you know that the contact was loaded. Press **Enter** to close the message and the Contact Search window. The contact information is loaded on the New Contact window.

6 If multiple contacts match your search terms, a message lets you know the number of matching records (except in Internet Explorer 8). Press **Enter** to close the message. The Contact Search window lists the matches. Tab to the Select link for the contact you want and press **Enter.** A message lets you know that the contact was loaded. Press **Enter** to close the message and the Contact Search window. The contact information is loaded on the New Contact window.

7 Press **Alt+s** and then **Enter.** A message lets you know the contact will be updated when the incident is saved. Press **Enter** to close the message and the New Contact window.

To edit contact information

1 On the incident you are editing, press **Alt+c** and then **Enter.** The Edit Contact window opens.

2 Tab through the contact fields until you get to the one you want to edit.

3 Edit the contact field.

4 Press **Alt+s** and then **Enter.** A message lets you know the contact will be updated when the incident is saved.

5 Press **Enter** to close the message and the Edit Contact window.

To change the contact associated with an incident

1 Open the incident and press **Alt+c** and then **Enter** to open the Edit Contact window.

2 Press **Alt+a** and then **Enter** to associate an existing contact with the incident. The Contact Search window opens.

3 Type complete or partial information in any of the following search fields: Last Name, First Name, Phone Number, Email, or Postal Code.

4 Press **Alt+s** and then **Enter** to search the knowledge base for contacts that match the terms you typed.

5 If only one contact matches your search terms, a message lets you know that the contact was loaded. Press **Enter** to close the message and the Contact Search window. The contact information is loaded on the Edit Contact window.

6 If multiple contacts match your search terms, a message lets you know the number of matching records (except in Internet Explorer 8). Press **Enter** to close the message. The Contact Search window lists the matches. Tab to the Select link for the contact you want and press **Enter.** A message lets you know that the contact was loaded. Press **Enter** to close the message and the Contact Search window. The contact information is loaded on the Edit Contact window.

7 Press **Alt+s** and then **Enter.** A message lets you know the contact will be updated when the incident is saved. Press **Enter** to close the message and the Edit Contact window.

8 Press **Alt+s** and then **Enter** again to save the incident.

Adding and editing organization information

If the contact for an incident you are editing is associated with an organization, that organization is automatically added to the incident. If you have added a new contact to an incident and the contact is associated with an organization, you will want to associate the existing organization with the incident. Doing so also associates the organization with the new contact you added. If the organization the contact belongs to is not already in your knowledge base, you can add a new organization while you are editing the incident and contact.

This section briefly describes how to add and edit organization information while you are working on an incident. For more detailed information about working with organizations, refer to Contacts and Organizations.

Note: You cannot add an organization to a new incident unless you have first added a contact.

To add an existing organization to an incident

Note: Besides letting you add an existing organization to an incident, this procedure also lets you change the organization associated with an incident.

1. With the incident open, press **Alt+o** and then **Enter** to open the Edit Organization window.
2. Press **Alt+a** and then **Enter** to associate an existing organization with the incident. The Organization Search window opens.
3. Type the first few characters of the organization's name.
4. Press **Alt+s** and then **Enter** to search the knowledge base for organizations that match the terms you typed.
5. If only one organization matches your search term, a message lets you know that the organization was loaded. Press **Enter** to close the message and the Organization Search window. The organization information is loaded on the Edit Organization window.
6. If multiple organizations match your search term, a message lets you know the number of matching records (except in Internet Explorer 8). Press **Enter** to close the message. The Organization Search window lists the matches. Tab to the Select link for the organization you want and press **Enter.** A message lets you know that the organization was loaded. Press **Enter** to close the message and the Organization Search window. The organization information is loaded on the Edit Organization window.
7. Press **Alt+s** and then **Enter.** A message lets you know the organization will be updated when the incident is saved. Press **Enter** to close the message and the Edit Organization window.

To add a new organization to a new incident

Note: The Add Organization link on the New Incident window is inactive until you add a contact to the incident.

1. On a new incident, press **Alt+o** and then **Enter.** The New Organization window opens.
2. Type the name of the organization.
3. Add any other organization information you want to include.

4 Press **Alt+s** and then **Enter.** A message lets you know the organization will be updated when the incident is saved. Press **Enter** to close the message and the New Organization window.

To edit organization information

1 On the incident you are editing, press **Alt+o** and then **Enter.** The Edit Organization window opens.

2 Tab through the organization fields until you get to the one you want to edit.

3 Edit the organization field.

4 Press **Alt+s** and then **Enter.** A message lets you know the organization will be updated when the incident is saved. Press **Enter** to close the message and the Edit Organization window.

Attaching files to incidents

There may be times when you are working on an incident and want to add a file that does not fit neatly into the Response field. For example, you might want to attach a spreadsheet or PDF file. When you attach a file to an incident, that file becomes permanently attached to the incident. Customers may attach files when they submit an incident, and these files are also permanently attached to the incident.

Files that are permanently attached to an incident are not sent in your response to the customer. Instead, you and other staff members can access the file from the incident on the Support Console, and the customer can access it from the customer portal. As a result, email is sent more quickly because the file is not included in the transmission, and files are kept in a single location for reference.

When you open the File Attachments window, you can attach a file to the incident or find out what files are already attached, including the file name, display name, size, content type, and date created. From this window, you can also open the file, edit the properties, delete the attachment, and download the file.

To attach a file to an incident

1 On an open incident, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Press **Tab** to move to the Browse button and press **Enter.** Select the file or type its name in the File Name field, press **Tab** to move to the Open button, and press **Enter.**

3 Press **Alt+s** and then **Enter** to close the File Attachment window and save the attachment to the incident.

4 Press **Alt+s** and then **Enter** to save and close the incident.

To open a file attached to an incident

1 On an open incident, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the View link in the Commands column of the file attachment you want to open and press **Enter.** The file opens in a separate window.

To edit the properties of a file attachment

1 On an open incident, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Properties link in the Commands column of the file attachment you want to edit properties for and press **Enter.** The Edit File Attributes window opens.

3 To change the name of the file, tab to the File Name field and type the new name.

4 To add or edit the name of the file as it appears to your customers, tab to the Display Name field and type the name.

5 To let other staff members access the file attachment but keep it private from customers, tab to Private and press the space bar to select it.

6 To add a description, tab to the Description field and type a description of the file.

7 Press **Alt+s** and then **Enter** to save your changes to the file's properties and close the Edit File Attributes window.

To delete a file attachment from an incident

1 On an open incident, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Delete link in the Commands column of the file attachment you want to delete and press **Enter.** You are asked to confirm that you want to delete the attachment. Press **Enter** to close the window and delete the attachment.

To download a file attached to an incident

1 On an open incident, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Download link in the Commands column of the file attachment you want to download and press **Enter.** The File Download window opens and asks if you want to open or save the file. Follow the prompts to download the file to the location you want.

Sending responses

When you are done working on an incident, you are ready to send your reply to the customer. Several options are available when you send a response, including copying other recipients, selecting encryption options, and attaching files to the response.

The Send on Save option is disabled by default, so you must select the option if you want to automatically send your response to the primary contact when you save the incident. You won't want to select it until you have completed the incident to avoid sending a response each time you save your changes while working on the incident.

To send a response to an incident

1 With the incident open, press **Alt+r.** The Send Response option is selected.

2 Press **Alt+s** and then **Enter** to save the incident and send your response. A message tells you the incident was created or updated. Press **Enter** to close the message and the incident.

To select additional recipients for an incident response

1 With the incident open, press **Alt+r** to select Send Response.

2 Press **Alt+t** and then **Enter** to select options for sending the incident. The Response Options window opens.

3 To send a copy of the response to other recipients, tab to the Cc or Bcc field and type the email addresses. Or tab to the Cc or Bcc label (not the field) and press **Enter** to open the Address List window, where you can search for and select email addresses.

4 By default, your signature is included in the response. To remove your signature from the response, press **Alt+r** to clear the Include Signature in Response option. When the option is disabled, you can add your signature by pressing **Alt+r** again.

5 To attach files to the incident, press **Alt+m** and then **Enter**. The File Attachments window opens to let you browse for and select files, as described in Attaching files to incidents. Response files are not attached to the incident, but are sent only one time with the response. Customers can click a link in the email to open the file.

6 To sign the response with the mailbox's S/MIME certificate, tab to Sign Email and press the space bar to select it. If the mailbox does not have a certificate that allows sending encrypted email, this selection is disabled and you will not be able to select encryption options as described in the next step.

7 To encrypt your response to the contact, tab to the Do Not Encrypt dropdown menu and use the up or down arrow key to select Encrypt When Possible or Encrypt Always.

8 Press **Alt+s** and then **Enter** to close the Response Options window.

9 Press **Alt+s** and then **Enter** to save and close the incident and send your reply. A message tells you the incident was created or updated. Press **Enter** to close the message and the incident.

Managing incidents

Besides adding and editing incidents, you may have other incident management duties as well. For example, you might want to forward, delete, print, or requeue or reassign incidents. This section describes the procedures to perform these tasks and also includes an overview of the audit log, which describes all the actions taken on an incident.

Forwarding incidents

There may be times when you need to forward an incident. For example, you might need information from another staff member before you can reply to a customer's question. If you are adding a new incident instead of editing an existing one, you must first save the incident before you can forward it.

To forward an incident

1 From an open incident, press **Alt+f** and then **Enter.** The Forward Incident window opens and the subject field is populated with the subject of the incident.

2 Type the email address for recipients in the To, Cc, or Bcc fields. Or tab to the To, Cc, or Bcc label and press **Enter** to open the Address List window, where you can search for and select email addresses.

3 To edit the subject line, tab to the Subject field and make your changes.

4 To include information about the contact in the forwarded incident, tab to Send Primary Contact Information and press the space bar to select it.

5 To prevent the incident notes from being forwarded with the incident, tab to Exclude Notes and press the space bar to select it.

6 To include the incident file attachments in the forwarded incident, tab to Incident Files and press the space bar to select it.

7 To attach files to the forwarded incident, press **Alt+m** and then **Enter**. The File Attachments window opens to let you browse for and select files, as described in Attaching files to incidents. Files are not attached to the incident, but are sent only one time with the forwarded incident. Recipients can click the link in the email to open the file.

8 To include a note when you forward the incidents, tab to the Comment field and type your notes in the field.

9 To sign the response with the mailbox's S/MIME certificate, tab to Sign Email and press the space bar to select it. If the mailbox does not have a certificate that allows sending encrypted email, this option is disabled.

10 To encrypt your response to the recipients, tab to the Do Not Encrypt dropdown menu and use the up or down arrow key to select Encrypt When Possible or Encrypt Always.

11 Press **Alt+s** and then **Enter** to forward the incident and close the Forward Incident window.

Deleting incidents

If your profile gives you permission to delete incidents, the Delete Incident option is enabled in the Actions column of the incidents report. When you delete an incident, you permanently remove it from the knowledge base.

To delete an incident

1 With an incidents report open, tab to the incident you want to delete.

2 Tab to the incident's Actions column, where Edit Incident is selected by default.

3 Press the down arrow key once to select Delete Incident.

4 Tab to the Go action and press **Enter.** A message asks you to confirm that you want to delete the incident.

5 Press **Enter** to delete the incident. A message lets you know the incident was deleted. Press **Enter** again to close the message.

The incident remains listed in the incidents report until you refresh the report by pressing **Alt+r** and then **Enter.**

Printing incidents

You can print an incident from a report on the Support Console or from an open incident. The Print link on the incident editor is available only when an existing incident is open, not when you are creating an incident.

To print an incident from a report

1. With an incidents report open, tab to the incident you want to print.
2. Tab to the incident's Actions column, where Edit Incident is selected by default.
3. Press the down arrow key twice to select Print Incident.
4. Tab to the Go action and press **Enter.** The incident opens in a separate window.
5. Press **Alt, f, p** to open the Print window and then press **Enter** to print the incident.
6. Press **Alt, f, x** to close the incident window and return to the incidents report on the Support Console.

To print an open incident

1. With the incident open, press **Alt+5** and then **Enter.** The incident opens in a separate window.
2. Press **Alt, f, p** to open the Print window and then press **Enter** to print the incident.
3. Press **Alt, f, x** to close the Print window and return to the open incident.

Reassigning and requeuing incidents

When you log out for the day, you probably do not want to keep unresolved incidents sitting in your inbox. You can assign them to another staff member or place them back in a queue so they will be worked. Or when you are assigned an incident incorrectly, you can assign it to the correct staff member or move it to the correct queue. Your manager may also have other guidelines for reassigning and requeuing incidents.

To reassign or requeue an incident

1 Open the incident you want to reassign or requeue.

2 To reassign the incident, press **Alt+2** and then **Enter** to move to the Incident Information section of the editor. Then tab to the Assigned dropdown menu and use the up or down arrow key to select the staff member you want to reassign the incident to.

3 To requeue the incident, tab to the Queue dropdown menu and use the up or down arrow key to select the queue you want to move the incident to.

4 Press **Alt+s** and then **Enter** to save the incident. A message lets you know the incident was updated. Press **Enter** to close the message. The incident is moved from your inbox to the agent's inbox or selected queue.

Opening the audit log

While you are working on an incident, you might find it useful to know what actions have been taken on it. The audit log is a table with four columns and a row for each action taken on the incident. The columns include date and time to indicate when the action was taken, who took the action, what the action was, and a description of the action.

To open the audit log for an incident

1 With the incident open, press **Alt+l** and then **Enter.** The incident audit log opens.

2 To close the audit log, press **Alt+x** and then **Enter.**

Chapter 4

Answers

Customers use your site to find answers to their questions about the services and products your organization provides. To help your customers find the information they are searching for, you can create answers to common questions and post them on your customer portal. As a result, your organization provides a better customer experience because your customers can quickly find the answers to their questions.

Oracle RightNow CX Cloud Service provides you with the tools for creating and publishing effective answers. Besides adding and editing answers, the Answer Console lets you search for answers, attach files to answers, and add products and categories to answers.

In this chapter

- Seeding your knowledge base—Describes how to establish processes for publishing answers, including how to create effective answers and how to control answer visibility.
- Maintaining your knowledge base—Describes manual and automatic ways to organize and maintain answers.
- Overview of answers—Provides an overview of answers and a discussion about answers reports, answer fields, and the answer editor. This section also contains the procedure to search for answers.
- Adding and editing answers—Contains the procedures to open, add, and edit answers, including adding notes and attaching files to answers.
- Managing answers—Contains the procedures to delete and print answers and open the answer's audit log.

Seeding your knowledge base

You do not need to create a knowledge base containing hundreds of answers before you can offer this information to your customers. Instead, you can start with only fifteen to twenty answers, which can speed up and simplify your implementation. Most organizations can build their initial knowledge base from existing questions and answers, documents, and customer support interactions.

As customers submit questions and your organization's support staff solves these issues, you are supplied with content that is perfectly suited for public answers. This lets you create public answers from the real issues that your customers are facing. Additionally, as you anticipate an increase in questions regarding an upcoming event, you can add answers to the knowledge base to answer questions before they are even asked.

Defining a process for publishing and reviewing answers

Before you develop your knowledge base, it is important to understand the process for publishing answers. The following process outlines the steps for efficiently capturing incident information and creating answers.

Step 1 Define a process for proposing new answers—Typically, a customer issue is the basis for an answer. You can review existing incidents to determine how agents solved the incident. Then you can work with their responses to create answers for the general knowledge base.

Step 2 Define a review and approval process for new answers—Once you draft an answer, you may want managers or other staff members to review and approve it for technical accuracy.

Step 3 Determine the audience for new answers—Before you publish an answer, determine where the answer will appear and which customers can view it. You control an answer's visibility through answer statuses, answer access levels, languages, products, and categories. Refer to Controlling answer visibility.

Step 4 Determine the display position of new answers—You can set the position of a new answer on your customer portal by placing it in a specific position in the list of answers. If you want to give added visibility to a newly published answer, place it at the top and then let its historical usefulness dictate its future placement. Moving new answers to the top of the list lets your customers know about them as you publish them.

Step 5 Notify staff and customers about new answers—Your administrator can create a custom report that shows the recently published answers. You can also set the Notify Subscribers field when you add or edit an answer so that all staff members and customers who are subscribed to the associated products and categories will know that a new answer is available.

After following these steps to identify your process for publishing answers to your customers, you can begin creating answers. The following section describes how you can create effective, useful answers for your customers.

Creating effective answers

Creating useful answers is a straightforward process with a few simple guidelines. By following these guidelines, you enable your customers to find information quickly. A knowledge base containing effective answers also optimizes the product's self-learning features that continually index, group, link, and rank the answers in the knowledge base.

Use the following guidelines to create clear, focused answers.

- **Create answers with only one topic.** Think of each answer in your knowledge base as one topic or the answer to one question. This improves searching and grouping so customers can easily find answers, and it simplifies management and maintenance of the knowledge base.
- **Provide adequate detail.** The text of the Summary, Question, and Answer fields are indexed into words and phrases for text searching and answer grouping. Answers should contain an adequate amount of text that explains the issue. Too little text results in very few indexed words, making the answer difficult to find during searching. Too much text can mean that the set of indexed words does not span the entire answer.
- **Write a concise summary.** A good summary is one that closely summarizes an answer's content. Customers read the summary to decide whether to open the answer or skip over it. The summary should state what the customer can expect to learn by reading the answer or what question is answered.
- **Create explicit keywords.** Sometimes you cannot capture the entire contents of an answer in a single sentence. The Keyword field lets you enter supplemental keywords, phrases, or text that represent the answer's contents. Be sure to include a thorough, yet concise section of keywords. The keywords you enter are not visible to customers.

After creating a knowledge base of effective answers, you publish the answers so your customers can access them. You need to understand the factors that determine answer visibility so you can control how and when answers are seen on the customer portal.

Controlling answer visibility

When you publish answers, you make them available to the public on your customer portal. You control an answer's visibility by what you specify in certain answer fields. This section explains the following key fields that determine how and where answers appear.

- Answer status
- Answer access level
- Language
- Products and categories

In order for an answer to appear on the customer portal, the status, access level, language, product, and category associated with the answer must be set to a visibility that allows access by customers. If even one of these fields does not allow visibility, the answer is not available on the customer portal.

Answer status

Answer status is the first factor that determines an answer's visibility. Every answer status, whether default or custom, has a status type that is either public or private. An answer with a Private status type never appears on the customer portal.

An answer changes to the Review status when its solved count reaches zero or when the date specified when adding or editing an answer is reached. The Review status has a Private status type that automatically removes the answer from the customer portal.

Answer access level

Access levels also control an answer's visibility. The default access level called Everyone lets all customers open all answers on all interfaces. When custom answer access levels are created by your administrator, they are defined by whether they have visibility on the customer portal. If they do, everyone can view answers with that access level. If they do not, customers must have a service contract that allows them to view answers with that access level.

Language

If you define a specific language for an answer, the answer appears only on the interfaces using that language.

Products and categories

If an answer is assigned to a product or category that does not have visibility on the customer portal, the answer will not be visible unless it is also assigned other products or categories that do have visibility on the customer portal.

Troubleshooting answer visibility

If an answer does not appear on the customer portal when you think it should, review the following questions. If any answer is no, the answer will not be visible.

- Is the answer status defined with the Public status type?
- Does the access level have visibility on the interface?
- Is the answer set to the same language as the interface for the customer portal?
- Is at least one of the products or categories for the answer visible on the interface?

Maintaining your knowledge base

Many of the tasks related to organizing and maintaining the answers in your knowledge base are automated so you can focus on improving the content of answers instead of spending all your time managing them.

Organizing answers

The answers your customers search for are sorted so the ones that are expected to be most useful are listed first. Three techniques are used to automatically rank and organize answers.

- **Customer feedback.** When customers open an answer, they are asked to rate how well it answered their question. Positive answers raise the solved count, which ranks the answer higher.
- **Display Position field.** When you work with an answer, you can set the Display Position field to move the answer to the top of the list, which ranks the answer high.
- **Click-track analysis.** Customers' movement through the knowledge base is analyzed to create associations between related answers and rank answers by how frequently they are opened.

Answer maintenance

A full array of automated processes helps maintain your knowledge base. The following list describes these processes.

- **Solved count.** The Solved Count feature collects information about the usefulness of answers in your knowledge base and uses this data to rank your answers. It uses implicit data gathered by the way customers select and view answers. It also uses explicit data based on how customers rate answers. When an answer has not been viewed for thirty days, its solved count declines. If an answer is not viewed for an extended period, its solved count reaches zero, its status is changed to Review, and it is removed from the customer portal. With the Solved Count feature, frequently used answers rise to the top of the knowledge base through aging.
- **Review feature.** The Review feature prevents you from forgetting to update an answer that may no longer be current, relevant, or useful. For example, you may want to review every answer six months from the date of its last edit. If this is the case, you can manually define a date to set the answer status to Review when you add or edit an answer.
- **Publish On field.** You may have answers created before the time you actually want to publish them. For example, you may have all your answers for a new product ready, but you do not want to make them available to your customers until the product is actually released. Rather than trying to remember to publish them at a later date, you can define the date in the Publish On field and the answer will be published automatically on the selected date.
- **Related answers.** Answers containing similar content are automatically clustered and linked so they can be presented to your customers as related answers on your customer portal.
- **Customer feedback.** When customers submit feedback on an answer, their feedback automatically creates an incident. You can then evaluate the customer’s comments and update the answer if necessary.

Overview of answers

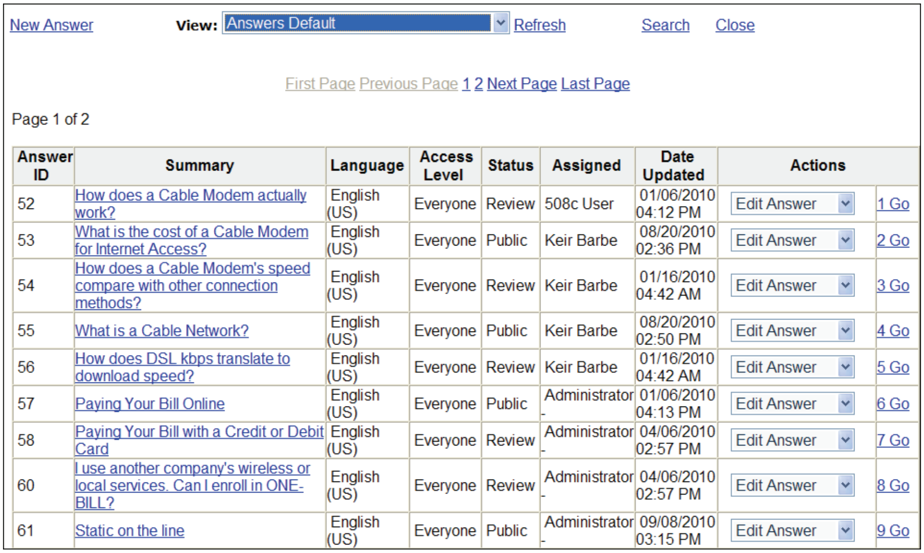
One of the best ways to improve your customers’ experience is to have answers to common questions readily available on your customer portal. You can create answers about your services and products and post them on your site. Once an answer is in your knowledge base, you can update it at any time, making sure your knowledge base contains only the most current information.

Answers reports

The Answer Console contains the default report when you first open it, but you can change it to whatever answers report you want. The Views dropdown menu lists all the reports you can open. These reports have been defined by your administrator in the navigation set associated with the profile for your staff account. (The displayed reports are the ones selected for the Answers navigation button.) Select any answers report to list the data on the Answer Console.

The answer information contained in the report depends on the report you opened and what fields and filters were defined when the report was created. The Answers Default report, for example, contains fields for the answer ID, summary, language, access level, status, assigned staff member, and date it was last updated.

Answers reports also contain an Actions column that lets you edit, delete, or print the answer.



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Answer ID	Summary	Language	Access Level	Status	Assigned	Date Updated	Actions	
52	How does a Cable Modem actually work?	English (US)	Everyone	Review	508c User	01/06/2010 04:12 PM	Edit Answer	1 Go
53	What is the cost of a Cable Modem for Internet Access?	English (US)	Everyone	Public	Keir Barbe	08/20/2010 02:36 PM	Edit Answer	2 Go
54	How does a Cable Modem's speed compare with other connection methods?	English (US)	Everyone	Review	Keir Barbe	01/16/2010 04:42 AM	Edit Answer	3 Go
55	What is a Cable Network?	English (US)	Everyone	Public	Keir Barbe	08/20/2010 02:50 PM	Edit Answer	4 Go
56	How does DSL kbps translate to download speed?	English (US)	Everyone	Review	Keir Barbe	01/16/2010 04:42 AM	Edit Answer	5 Go
57	Paying Your Bill Online	English (US)	Everyone	Public	Administrator -	01/06/2010 04:13 PM	Edit Answer	6 Go
58	Paying Your Bill with a Credit or Debit Card	English (US)	Everyone	Review	Administrator -	04/06/2010 02:57 PM	Edit Answer	7 Go
60	I use another company's wireless or local services. Can I enroll in ONE-BILL?	English (US)	Everyone	Review	Administrator -	04/06/2010 02:57 PM	Edit Answer	8 Go
61	Static on the line	English (US)	Everyone	Public	Administrator -	09/08/2010 03:15 PM	Edit Answer	9 Go

If the report contains more than one page, the number of pages is listed. Each time you move from one page to another, a message opens to let you know what page number you are on. Press **Enter** to close the message. Note: This message does not open in Internet Explorer 8.

- To select the first page, press **Alt+i** and then **Enter.**
- To select the previous page, press **Alt+p** and then **Enter.**
- To select the next page, press **Alt+z** and then **Enter.**
- To select the last page, press **Alt+l** and then **Enter.**

To open an answers report

1. From the Session Console, press **Alt+a** and then **Enter** to open the Answer Console. (If the default report that opens automatically on the console contains more than one page, a message lets you know how many pages are in the report. Press **Enter** to close the message.)

2. Tab to the View dropdown menu.

3. Use the up or down arrow key to select the answers report you want to open.

4. Press **Alt+r** and then Enter to refresh the previous report with the report you selected. A message lets you know how many pages are in the selected report. Press **Enter** to close the message.

Many answers reports have sorting options that let you sort records by answer ID, date updated, or other sort criteria, as defined in the report you selected. You can also specify whether the results should be arranged in ascending or descending order.

To sort an answers report

1. Tab to the Sort By dropdown menu at the bottom of the page.

2. Use the up or down arrow key to select a sorting option from the menu.

3. Tab to the Direction dropdown menu.

4. Use the up or down arrow key to select Ascending or Descending.

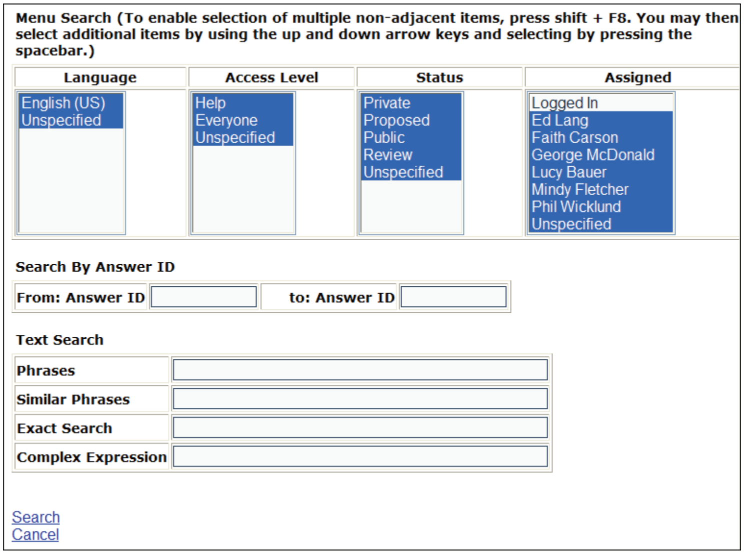
5. Press **Alt+o** and then **Enter** to sort the report.

Searching for answers

If the report you have selected contains many answers, you may want to search the report to find the one you want to open. Different reports offer different search options. For example, if you select the Answers Default report, you can search on language, access level, status, assigned staff member, answer ID, and text within the answer, but the only available search field for the Answer Quick Search report is the answer ID.

To search for an answer

1. Press **Alt+s** and then **Enter** to open the Search window.



Menu Search (To enable selection of multiple non-adjacent items, press shift + F8. You may then select additional items by using the up and down arrow keys and selecting by pressing the spacebar.)

Language	Access Level	Status	Assigned
English (US) Unspecified	Help Everyone Unspecified	Private Proposed Public Review Unspecified	Logged In Ed Lang Faith Carson George McDonald Lucy Bauer Mindy Fletcher Phil Wicklund Unspecified

Search By Answer ID

From: Answer ID ☐ **to: Answer ID** ☐

Text Search

Phrases ☐
Similar Phrases ☐
Exact Search ☐
Complex Expression ☐

Search
Cancel

2 Enter your search criteria. This may mean typing text in a field or making a selection from a menu. If you want to select multiple menu items, first press **Shift+F8.** Then use the up or down arrow key to move to each item you want to select and press the space bar.

There are four ways to search for text within an answer. Note that all four methods of searching will find different word forms of the terms you enter, such as singular, plural, and different verb tenses. Also, all search methods use the logical operators AND and OR. Type a plus sign before a word to find answers that must include the word. To exclude answers that contain a word, type a minus sign before the word. Select one of the four following search options.

- Select **Phrases** to match the phrase you enter.
- Select **Similar Phrases** to match answers containing synonyms and similarly spelled words as those you enter in the text field.
- Select **Exact Search** to match the exact sequence of the terms you type.
- Select **Complex Expression** to allow wildcard searching.

3 When you have entered all search criteria, press **Alt+s** and then **Enter.** A message displays the number of answers that match your search terms (except in Internet Explorer 8). Press **Enter** to close the message. The Answer Console lists all answers that match your search terms.

Answer fields

When you work on an answer, the window contains fields and menus that let you enter information about the answer. The fields include the answer's summary, keywords, question, and answer. The answer window also lists the answer ID number and contains a link to additional information, such as when the answer was created and last updated. Dropdown menus on the window let you select the answer's status, language, access level, assigned staff person, review on date, publish on date, display position, and if and when to notify subscribers that the answer is new or updated.

Some of these fields are required by default, and your administrator may require others, including any custom answer information your organization uses. You must complete all required fields before you can save the answer.

Answer editor

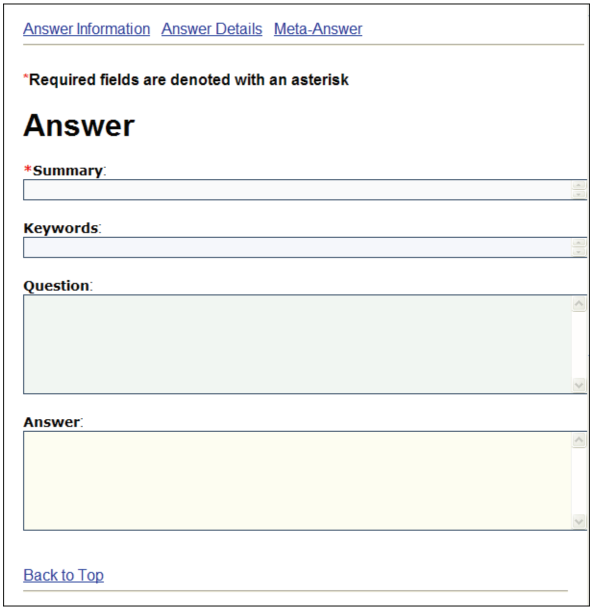
When you add an answer, the New Answer window opens. When you edit an existing answer, the Edit Answer window opens. Unless it is necessary to distinguish between the two windows, both are referred to as the answer editor in the following procedures.

The answer editor is a scrolling window that contains all the fields and menus necessary to complete an answer. Because it contains many fields, it is divided into sections. For ease of navigation, the top line of the editor contains links to the different sections. In addition to the Answer section at the top of the window, which has no link, the sections and links include Answer Information, Answer Details, and Meta-Answer. If your organization uses answer custom fields, there is also a section and link for custom fields. The Edit Answer window also contains a link that lets you print answers, but this link is not available on the New Answer window.

Every section of the answer editor contains a link to return to the top of the editor. Press **Alt+b** and then **Enter** to return to the top from any section of the editor.

Answer section

The Answer section of the answer editor contains the Summary, Keywords, Question, and Answer fields. With the exception of keywords, this is the information your customers see when they open answers. These fields make up the main content of the answer.



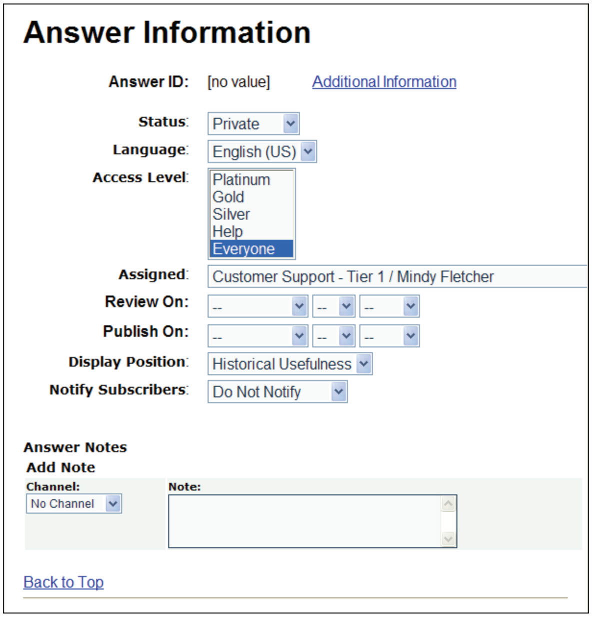
Answer Information
Answer Details
Meta-Answer
*Required fields are denoted with an asterisk
Answer
*Summary:
Keywords:
Question:
Answer:
Back to Top

Answer Information section

The Answer Information section of the answer editor contains the following fields, menus, and options.

- The answer's ID number that is assigned automatically and cannot be edited
- An Additional Information link that opens a window containing more information about the answer, including when it was created and updated, what staff member edited it last, when the last notification occurred and the next one is scheduled, whether it is in any rule state or escalation level, and the meta-answer ID.
- The Access Level menu
- Dropdown menus for the following fields:
  - ▷ Status
  - ▷ Language
  - ▷ Assigned
  - ▷ Review On
  - ▷ Publish On
  - ▷ Display Position
  - ▷ Notify Subscribers

- An Answer Notes field and Channel drop-down menu



Answer Information

Answer ID: [no value] Additional Information

Status: Private

Language: English (US)

Access Level: Platinum, Gold, Silver, Help, Everyone (Everyone selected)

Assigned: Customer Support - Tier 1 / Mindy Fletcher

Review On: -- -- --

Publish On: -- -- --

Display Position: Historical Usefulness

Notify Subscribers: Do Not Notify

Answer Notes

Add Note

Channel: No Channel

Note:

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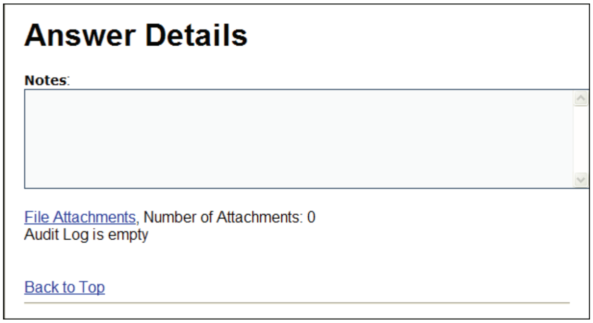
Answer Details section

The Answer Details section of the answer editor includes the following fields and options.

- A Notes field
- A File Attachments link with the number of attachments to the answer
- An Answer Audit Log link that lists all the actions taken on the answer. The audit log link is active only for existing answers on the Edit Answer window, not for answers you are creating on the New Answer window.



Answer Details

Notes:

File Attachments, Number of Attachments: 0
Audit Log is empty

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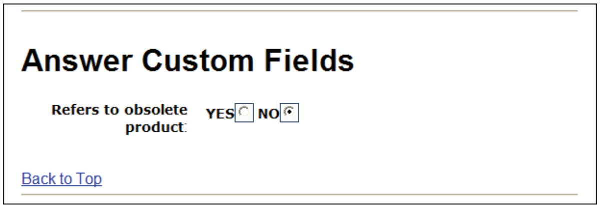
Answer Custom Fields section

If your organization uses answer custom fields, the answer editor has an area specifically for them. Depending on the type of custom field, you complete them by selecting a date, typing text, or selecting a menu option or radio button.



Answer Custom Fields

Refers to obsolete product: YES ○ NO ●

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Meta-Answer section

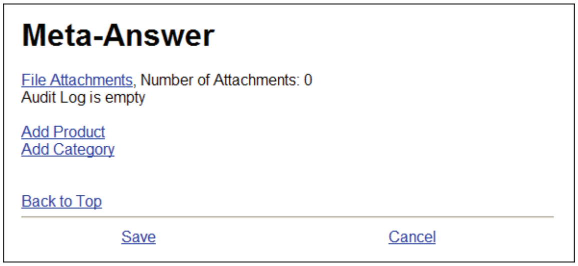
A meta-answer is a collection of related answers that are all associated with the same products and categories. These related answers are called sibling answers, and that relationship is defined on the CX Console, not on the accessibility interface.

Although you cannot define sibling answer relationships on the accessibility interface, you can edit the meta-answer for an answer on the accessibility interface. This means that when you edit an existing answer, you can edit the products, categories, and file attachments for the answer's meta-answer, which affects all answers associated with the meta-answer.

Every answer has a meta-answer, even if that meta-answer "collection" includes only the one answer instead of several sibling answers. When you create an answer on the Answer Console, you are also creating the answer's meta-answer. But unless the answer you create is edited on the CX Console, it will not have any sibling answers associated with its meta-answer. Because the answer's products and categories are the same as the products and categories for its meta-answer, you select the answer's product and category in the Meta-Answer section of the answer editor.

The Meta-Answer section of the answer editor includes the following links.

- A File Attachments link with the number of attachments to the meta-answer
- A Meta-Answer Audit Log link that lists all actions taken on the meta-answer. The audit log link is active only for existing answers on the Edit Answer window, but not for answers you are creating on the New Answer window.
- Links for product and category. On the New Answer window, the links are Add Product and Add Category. On the Edit Answer window, the links are View/Edit Product and View/Edit Category. Selecting a link opens a window where you can select products or categories to associate with the meta-answer.



Meta-Answer

File Attachments, Number of Attachments: 0
Audit Log is empty

Print link

The Print link is available on the Edit Answer window but not on the New Answer window. This link opens the answer in a separate window that provides a print command. Refer to Printing answers.

Adding and editing answers

When you add and edit answers, you generally start by completing the summary, keywords, question, and answer fields. After that, you complete the answer fields and, if necessary, attach files to the answer. You can save the answer at any stage of the process and return later to complete it.

As you add and edit answers, you can refresh the answers report on the Answer Console by pressing **Alt+r** and then **Enter.**

In the following procedures, assume that the Answers Default report is opened by default when you open the Answer Console. If your Answer Console does not open the answers report you need, talk to your administrator about changing the configuration.

To open a new or existing answer

1 On the Session Console, press **Alt+a** and then **Enter** to open the Answer Console.

2 To add an answer, press **Alt+n** and then **Enter** to open the New Answer window.

Or

To edit an answer, tab to the row containing the answer you want to select, tab to Go in the Actions column, and press **Enter.** The Edit Answer window opens.

Working on the Answer fields

The answer fields comprise the basic part of the answer. These fields include the answer summary, keywords, and the question and answer.

To add or edit the Answer fields

1 This step is required. Open the answer and type the answer summary in the Summary field. A good summary statement tells the customer what they can expect to learn by reading the answer.

2 Tab to the Keywords field and type words or phrases that represent the answer's contents. Separate keywords with commas. If you enter a phrase instead of a single word, be sure to separate the words in the phrase with spaces, and also separate phrases from one another by commas.

3 Tab to the Question field and type the question.

4 Tab to the Answer field and type the answer.

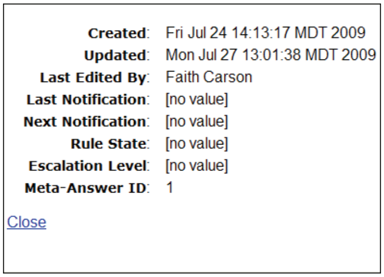
Completing the remaining answer fields

The information you enter in the Summary, Keywords, Question, and Answer fields is only part of working on an answer. You must also complete the remaining answer fields. Remember that you can access the fields on the various sections of the Answer Console through the links at the top of the answer editor.

Completing answer information

The Answer Information link on the answer editor takes you to the part of the window where you can access information about the answer and enter menu options that help determine how the answer is categorized in your knowledge base.

The answer ID number is listed in this section. The number is assigned automatically and cannot be edited. This section also contains a link to additional information about the answer, which you can access by pressing **Alt+i** and then **Enter.** It contains the date and time the answer was created and last updated, when the last notification was sent, and when the next notification is scheduled. The Additional Information window also contains the name of the staff member who last updated the answer, whether it is in any rule state or escalation level, and the meta-answer ID. Press **Alt+x** and then **Enter** to close the window.



Created: Fri Jul 24 14:13:17 MDT 2009
Updated: Mon Jul 27 13:01:38 MDT 2009
Last Edited By: Faith Carson
Last Notification: [no value]
Next Notification: [no value]
Rule State: [no value]
Escalation Level: [no value]
Meta-Answer ID: 1

To complete answer information

1 From an open answer, press **Alt+1** and then **Enter** to move to the Answer Information section of the window.

2 Tab to the Status dropdown menu and use the up or down arrow key to select from the available statuses, which include Public, Private, Proposed, and Review, as well as any custom statuses used by your organization.

3 Tab to the Language dropdown menu and use the up or down arrow key to select from the available languages.

4 Tab to the Access Level menu and use the up or down arrow key to select an access level. If you want to select multiple access levels, first press **Shift+F8.** Then use the up or down arrow to move to each item you want to select and press the space bar.

5 Tab to the Assigned dropdown menu and use the up or down arrow key to select the staff member assigned to the answer. By default, your name populates this field.

6 Tab to the Review On field and select the date when you want the answer status to change to Review. Use the up or down arrow key to select the month first, then the day, and then the year.

7 Tab to the Publish On field and select the date when you want the answer status to change to Public. Use the up or down arrow key to select the month first, then the day, and then the year.

8 Tab to the Display Position dropdown menu and use the up or down arrow key to select a display position for the answer when it appears in the results of a customer search. You can select Historical Usefulness, which uses customer feedback to adjust the answer's ranking. Another option is to place the answer at the bottom, middle, or top of the list as its starting point and then let its usefulness affect its position as customers access it. The final option is to permanently fix the answer's position at the bottom, middle, or top of the list, regardless of how often it is accessed.

9 Tab to the Notify Subscribers dropdown menu and use the up or down arrow key to select when you want to let subscribers to this answer know that it has been updated. The options include Do Not Notify, This Hour, End of Today, End of this Week, and End of this Month.

10 To select a channel for the answer, tab to the dropdown menu and use the up or down arrow key to make your selection.

11 To add a note to the answer, tab to the Note field and type any information you want to add about the answer in the field. Customers cannot see any notes you add.

Completing answer details

The Answer Details link on the answer editor includes the following links.

- **File Attachments**—Refer to Attaching files to answers.
- **Audit Log**—Refer to Opening the audit log.

Completing answer custom fields

If your administrator has added answer custom fields, you can complete them on the answer editor. To access the custom fields from an open answer, press **Alt+3** and then **Enter.** Complete the custom fields by selecting a date, typing text, or selecting a menu option or radio button.

Completing meta-answer fields

Meta-answers are collections of answers that have the same products and categories. You can attach files to meta-answers and edit meta-answer products and categories. The procedure for attaching files to meta-answers is the same as attaching them to answers. Refer to Attaching files to answers.

To select products for a meta-answer

1. From an open answer, press **Alt+p** and then **Enter** to open the Product Hierarchy window.
2. Tab through the products until you reach the first one you want to add to the meta-answer.
3. Press the space bar to select the product.
4. To select additional products, tab to your selection and press the space bar to select each one.
5. To clear existing product associations, tab to the product and press the space bar to clear the selection.
6. Press **Alt+s** and then **Enter** to close the Product Hierarchy window and return to the answer editor.
7. Press **Alt+s** and then **Enter** to save the answer. A message lets you know the answer was created or updated. Press **Enter** to close the message.

To select categories for a meta-answer

1. From an open answer, press **Alt+c** and then **Enter** to open the Category Hierarchy window.
2. Tab through the categories until you reach the first one you want to add to the meta-answer.
3. Press the space bar to select the category.
4. To select additional categories, tab to your selection and press the space bar to select each one.
5. To clear existing category associations, tab to the category and press the space bar to clear the selection.

6 Press **Alt+s** and then **Enter** to close the Category Hierarchy window and return to the answer editor.

7 Press **Alt+s** and then **Enter** to save the answer. A message lets you know the answer was created or updated. Press **Enter** to close the message.

Attaching files to answers

You may want to add a file to an answer if the information in the file is not something you can easily add to the text of the answer. For example, you might want to attach a spreadsheet to an answer. The File Attachments window lists the files attached to the answer, including the file name, display name, size, content type, and date created.

After files have been attached to an answer, you can open the File Attachments window to open the file, edit the properties, delete the attachment, and download the file.

To attach a file to an answer

1 From an open answer, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Press **Tab** to move to the Browse button and press **Enter.** Select the file or type its name in the File Name field, press **Tab** to move to the Open button, and press **Enter.**

3 Press **Alt+s** and then **Enter** to close the File Attachments window and save the attachment to the answer.

4 Press **Alt+s** and then **Enter** to save and close the answer.

To open a file attached to an answer

1 From an open answer, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the View link in the Commands column of the file attachment you want to open and press **Enter.** The file opens in a separate window.

To edit the properties of a file attachment

1 From an open answer, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Properties link in the Commands column of the file attachment you want to edit properties for and press **Enter.** The Edit File Attributes window opens.

3 To change the name of the file, tab to the File Name field and type the new name.

4 To add or edit the name of the file as it appears to your customers, tab to the Display Name field and type the name.

5 To let other staff members access the file attachment but keep it private from customers, tab to Private and press the space bar to select it.

6 If you want the text in the file to be searched when customers conduct searches on the customer portal, tab to Indexed and press the space bar to select it.

7 To add a description, tab to the Description field and type a description.

8 Press **Alt+s** and then **Enter** to save your changes to the file's properties and close the Edit File Attributes window.

To delete a file attachment from an answer

1 From an open answer, press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Delete link in the Commands column of the file attachment you want to delete and press **Enter.** You are asked to confirm that you want to delete the attachment. Press **Enter** to close the window and delete the attachment.

To download a file attached to an answer

1 Press **Alt+m** and then **Enter** to open the File Attachments window.

2 Tab to the Download link in the Commands column of the file attachment you want to download and press **Enter.** The File Download window opens and asks if you want to open or save the file. Follow the prompts to download the file to the location you want.

Managing answers

Besides adding and editing answers, you may have other answer management duties as well. For example, you might want to delete or print answers. This section describes how to perform these tasks and also includes an overview of the audit log, which describes all the actions taken on an answer.

Deleting answers

If your profile gives you permission to delete answers, the Delete Answer option is enabled in the Actions column of the answers report. When you delete an answer, you permanently remove it from the knowledge base.

To delete an answer

1 With an answers report open on the Answer Console, tab to the answer you want to delete.

2 Tab to the answer's Actions column, where Edit Answer is selected by default.

3 Press the down arrow key once to select Delete Answer.

4 Tab to the Go action and press **Enter.** A message asks you to confirm that you want to delete the answer.

5 Press **Enter** to delete the answer. A message tells you the answer was deleted. Press **Enter** to close the message.

The answer remains listed in the answers report until you refresh the report by pressing **Alt+r** and then **Enter.**

Printing answers

You can print an answer from a report on the Answer Console or from an open answer. The Print link is available only when an existing answer is open, not when you are creating an answer.

To print an answer from a report

1 With an answers report open on the Answer Console, tab to the answer you want to print.

2 Tab to the answer's Actions column, where Edit Answer is selected by default.

3 Press the down arrow key twice to select Print Answer.

4 Then tab to the Go action and press **Enter.** The answer opens in a separate window.

5 Press **Alt, f, p** to open the Print window and then press **Enter** to print the answer.

6 Press **Alt, f, x** to close the answer window and return to the answers report on the Answer Console.

To print an open answer

1. With the answer open, press **Alt+5** and then **Enter.** The answer opens in a separate window.
2. Press **Alt, f, p** to open the Print window and then press **Enter** to print the answer.
3. Press **Alt, f, x** to close the answer Print window and return to the open answer.

Opening the audit log

When you work on an answer, you might find it useful to know what actions have been taken on it. For example, the answer audit log can tell you when and by whom an answer was created, what staff members worked on it and what they did, and any rule actions that were applied to the answer.

The audit log is a table with four columns and a row for each action taken on the answer. The columns include date and time to indicate when the action was taken, who took the action, what the action was, and a description of the action.

To open the answer audit log

1. With the answer open, press **Alt+l** and then **Enter.** The answer audit log opens.
2. To close the audit log, press **Alt+x** and then **Enter.**

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