iConnect for Oracle CRM OnDemand User Guide

InQuira Version 8.2.3

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InQuira, Inc.

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

Table of Contents

Preface: About this Guide **3**

Chapter 1: User Registration **7**
Introduction 7
New User Registration 8
Account Activation 11

Chapter 2: Login **12**
Forgot Password? 13
Reset Password 14
Reset Time Zone 15

Chapter 3: Case Management **16**
Introduction 16
Create a Case (Submit a Case Online) 16
View My Cases 19
View Company Cases 22
Search Cases 27
View/ Update Case Detail 28
Post Topic to Community 31

Appendix A: Outages **34**

Preface

About This Guide

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

This preface includes information on:

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

In This Guide

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

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

Contacting InQuira

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

Address:	900 Cherry Ave. 6th Floor San Bruno, CA 94066
Telephone:	(650) 246-5000
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Email:	For sales information, send email to sales@inquira.com. For product support, send email to support@inquira.com.
World Wide Web:	Learn more about InQuira products, solutions, services, and support on the world wide web at: **www.inquira.com**.

InQuira Product Documentation

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

`http://documentation.inquira.com/`

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

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

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

Detailed information about each product document set is available in:

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

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

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

InQuira Analytics Documentation

InQuira Analytics is distributed with the following documentation.

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

Intelligent Search Documentation

Intelligent Search is distributed with the following documentation.

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

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

Information Manager Documentation

InQuira Information Manager is distributed with the following documentation.

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

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

iConnect Integration Documentation

The InQuira iConnect products are distributed with the following documentation.

Document	Number	Description
iConnect Developers Guide	CA20-IG-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported CRM application.
iConnect for Siebel Contact Center Integration Guide	CA82-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported Siebel application.
iConnect for Oracle CRM On Demand Integration Guide	CRMOD82-SG-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported Oracle CRM On Demand application.
iConnect for Oracle CRM OnDemand User Guide	CRMOD82-SS-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported Oracle CRM On Demand self-service portal.

Screen and Text Representations

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

References to World Wide Web Resources

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

CHAPTER 1

User Registration

Introduction

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

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

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

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

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

a Navigate to IE8 Tools->Internet Options->Security->Internet .

b Set it to **Default Level**.

c Go to Trusted Sites-> Sites.

d Add these two sites as trusted sites:

- `*.inquira.com`
- `https://sso.ondemand.com`

Registration

New User Registration

Steps to register if you are new user:

1 Go to the Self Service Portal URL.

2 Click on New User? 'Start here' link under the login.

The page redirects to the 'New User Registration' page.

3 Enter all the required fields (If the word verification is not legible, click on to get a new word).

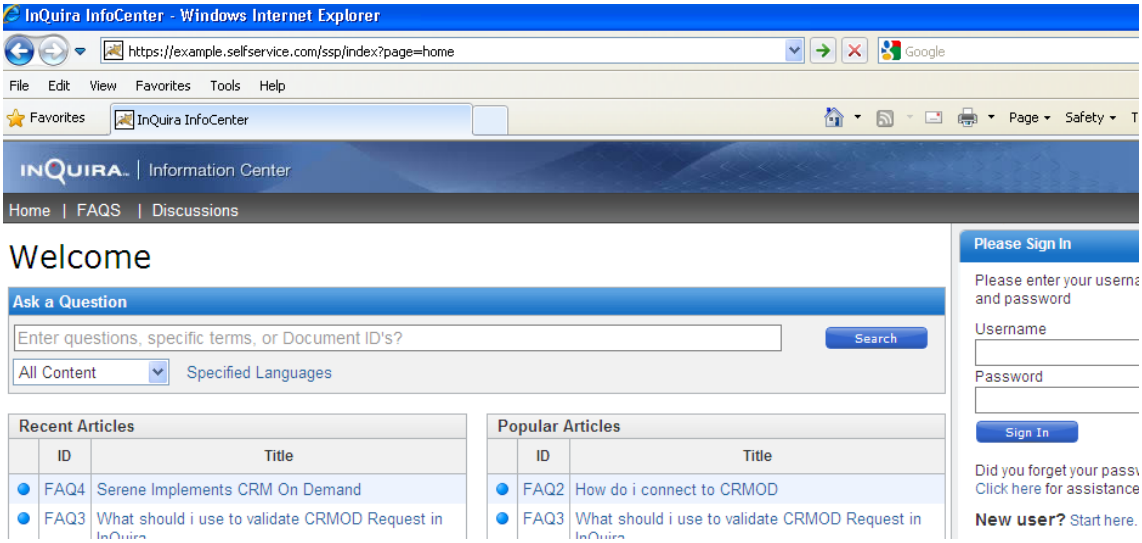
4 Change the default time zone, if needed.

5 Click 'Register'.

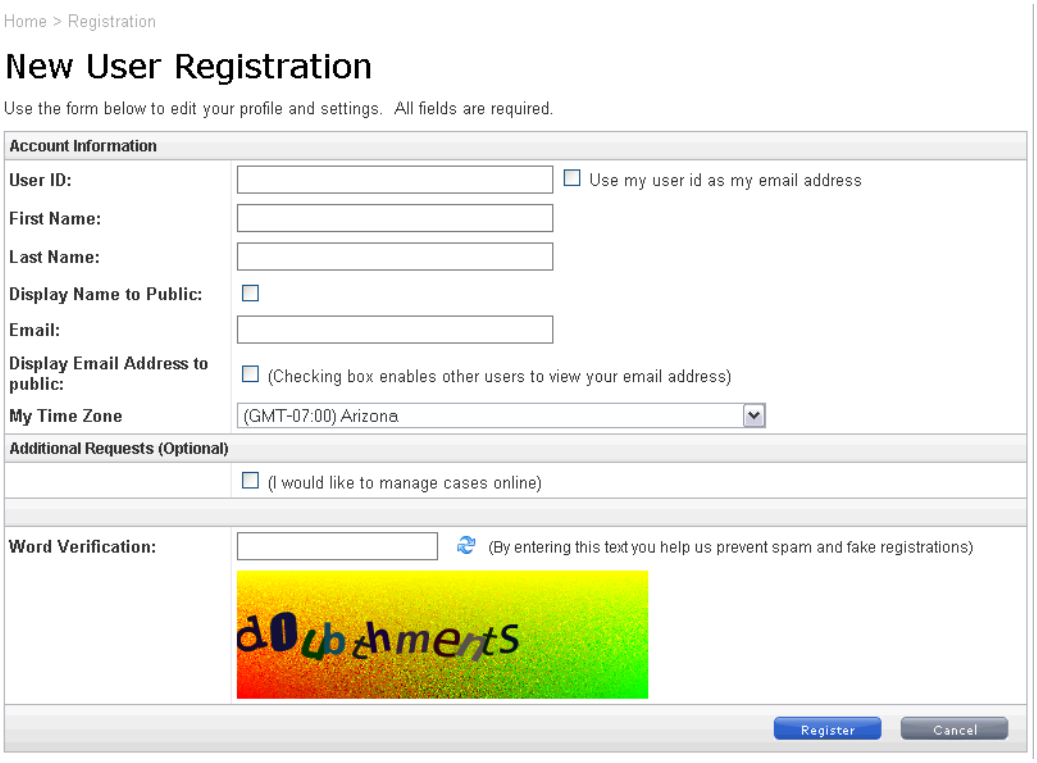
6 If registration fails, an appropriate message displays.

WALK-THRU

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



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



3 Enter all the required fields (First Name, Last Name, Email, User ID, Word Verification)

You can use your email address as your user ID. To do so, select the **Use my user id as my email address** checkbox.

If you do not select Display Name to Public, the system prompts you for an alias.

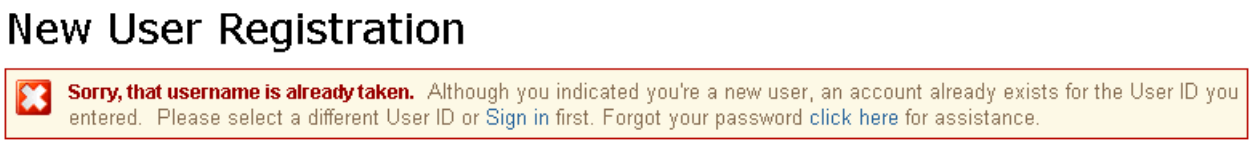
4 Change the default time zone, if needed.

5 Click on 'Register'

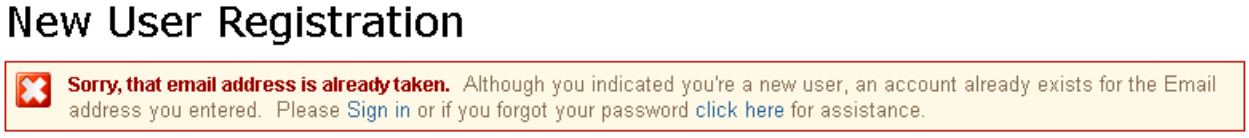
6 Following message will be displayed on the SSP Home page

7 If the registration fails, an appropriate message will be displayed to the end user

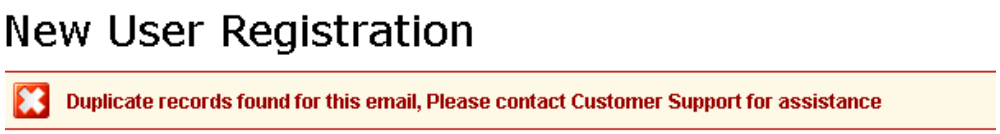
a If the user name is already taken, the user will get the following message



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



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



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

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

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

Available TimeZones:

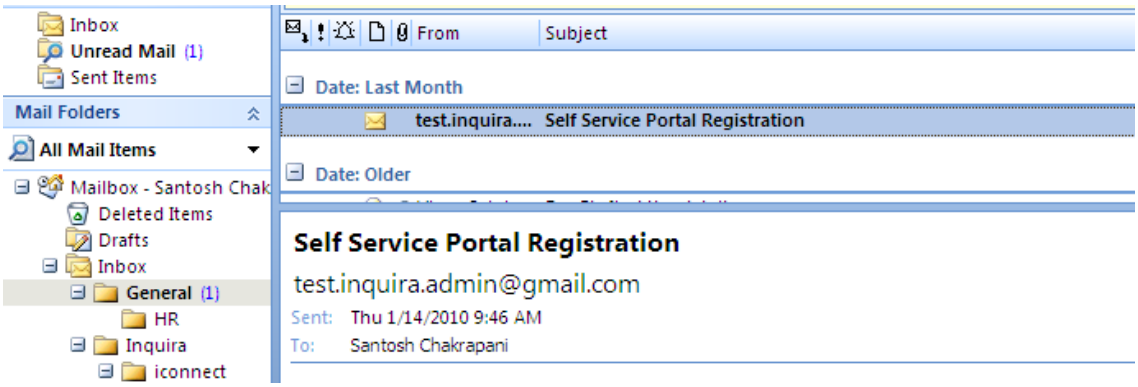
- (GMT-06:00) Central America
- (GMT-06:00) Central Time (US & Canada)
- (GMT-06:00) Mexico City
- (GMT-06:00) Saskatchewan
- (GMT-06:00) Tegucigalpa

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

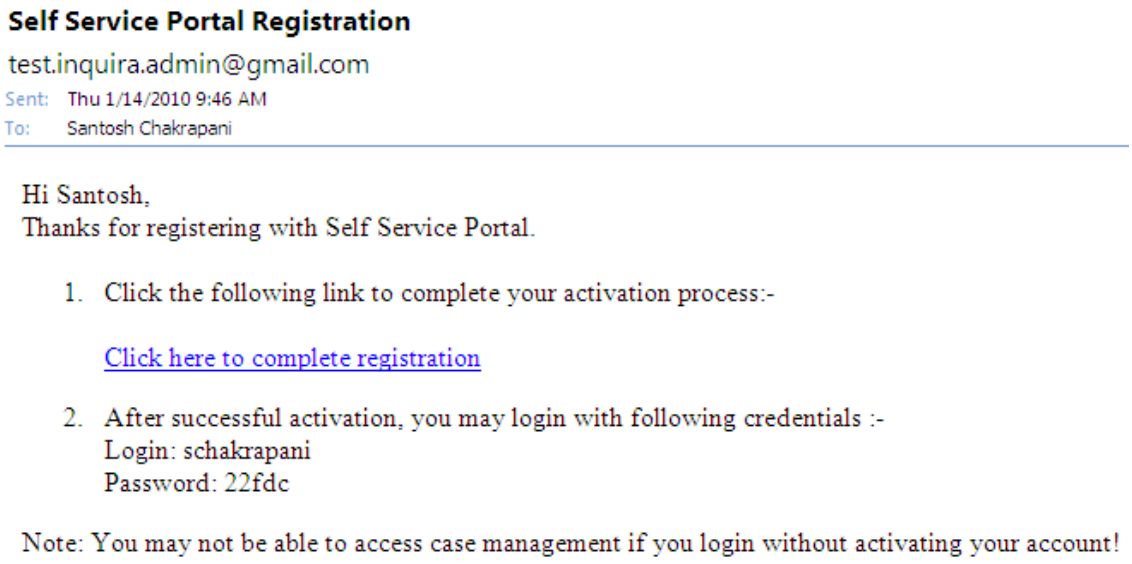
Users may need to manually correct the time zone.

Account Activation

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



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



Self Service Portal Registration

test.inquira.admin@gmail.com

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

To: Santosh Chakrapani

Hi Santosh,
Thanks for registering with Self Service Portal.

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

   Click here to complete registration

2. After successful activation, you may login with following credentials :-
   Login: schakrapani
   Password: 22fdc

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

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

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

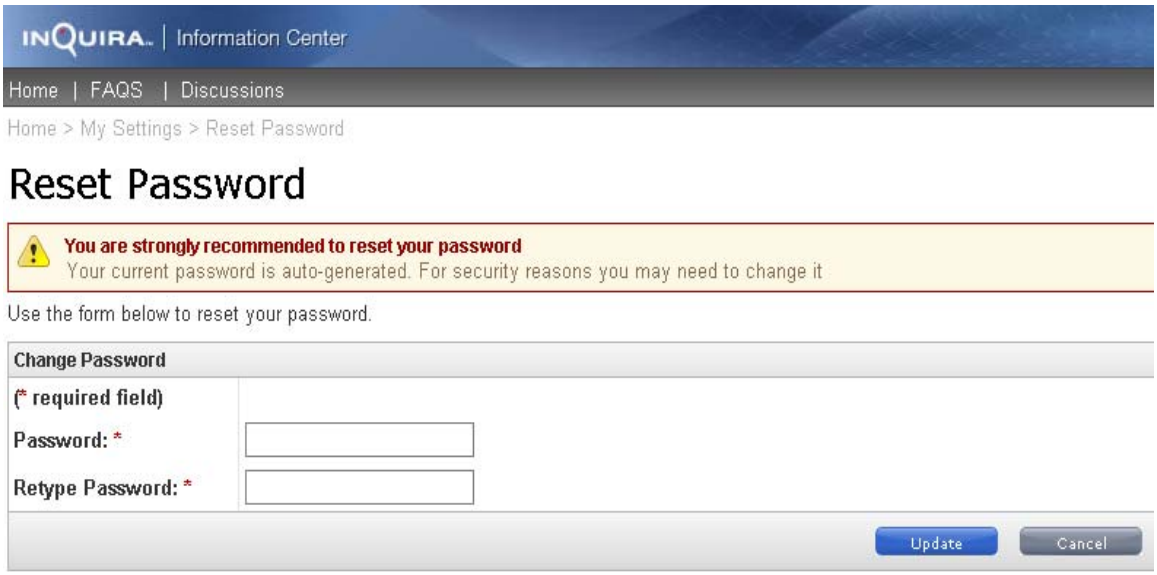
CHAPTER 2

Login

Logging into the portal is a pretty standard process.

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

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



Forgot Password?

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

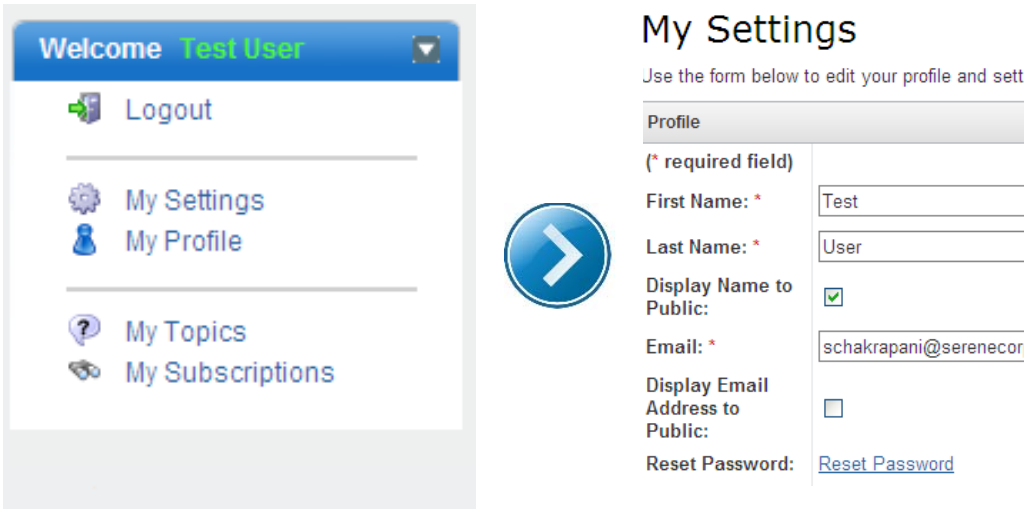
1. On the home page, follow the ‘Click here’ link under ‘Did you forget your password?’
2. Enter the ‘Email Address’ and click on ‘Send’ button
3. An email will be sent with the password reminder

WALK-THRU

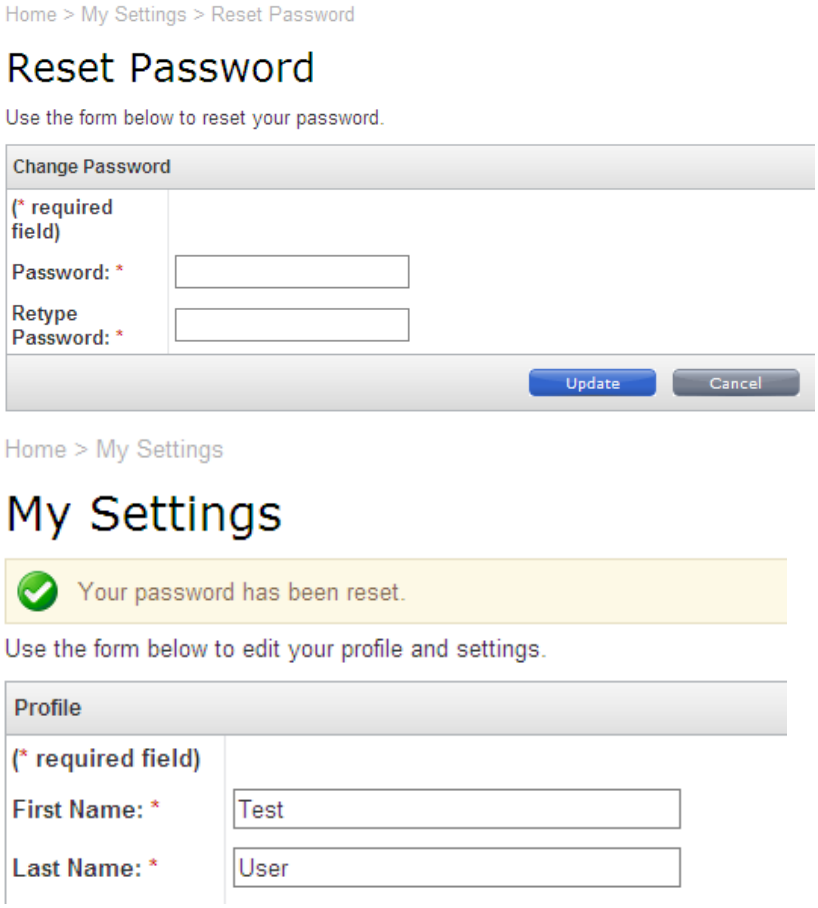
Reset Password

To reset the password, follow these steps:-

1. Login into Self Service Portal
2. Click on ‘My Settings’ and then Click ‘Reset Password’



3 Enter the password and retype the password and click on ‘Update’



Reset Time Zone

To reset the time zone, follow these steps:-

1 Login into Self Service Portal

2 Click on ‘My Settings’

3 Update the ‘My Time Zone’ accordingly.

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

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

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

Available TimeZones:

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

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

Users may need to manually correct the time zone.

CHAPTER 3

Case Management

Introduction

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

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

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

1. Create a Case (Submit a Case Online)

   Verify the user information and record the issue. Submit additional attachments in support of the case being created.

2. View Cases (My Cases, Company Cases)

   View cases specific to the user and/or view company cases

3. Search Cases

   Search for cases based on specific criteria

4. View/Update Case Detail

   View the progress of the case, Update the case with additional notes, and modify the case summary and description. The case could be own case or company case.

Create a Case (Submit a Case Online)

Steps to create a new case

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

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

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

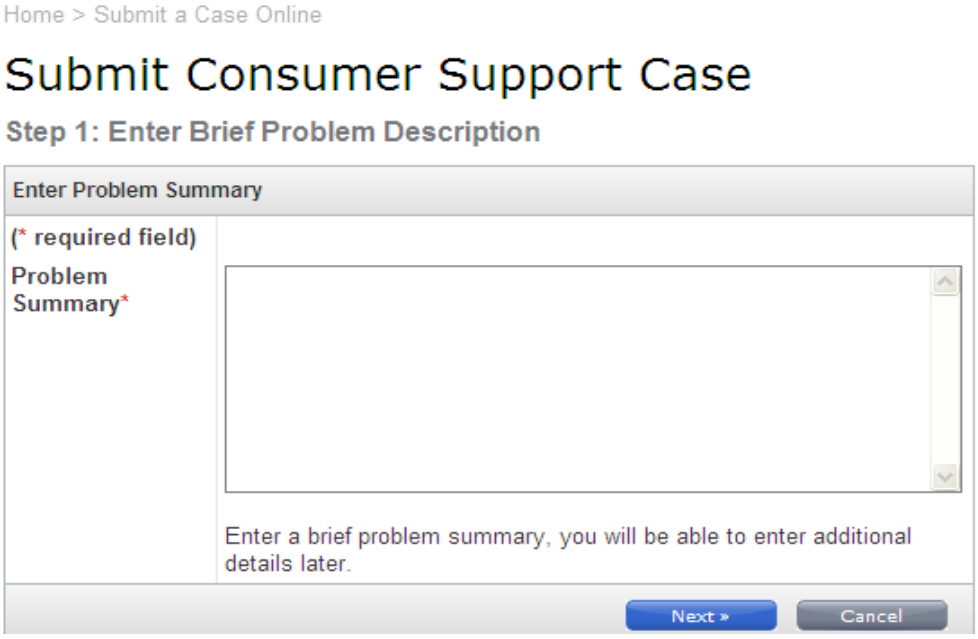
6 Attach multiple files (possibly Screenshots or other documents) supporting their case.

7 Click on ‘Save’ button

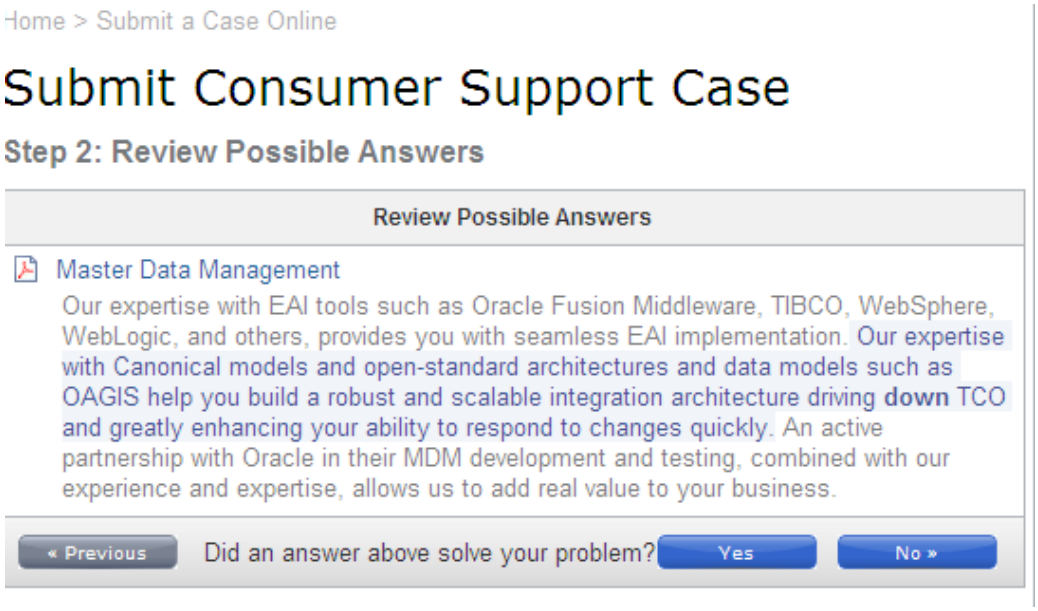
WALK-THRU

1 Click on ‘Submit a Case Online’ link

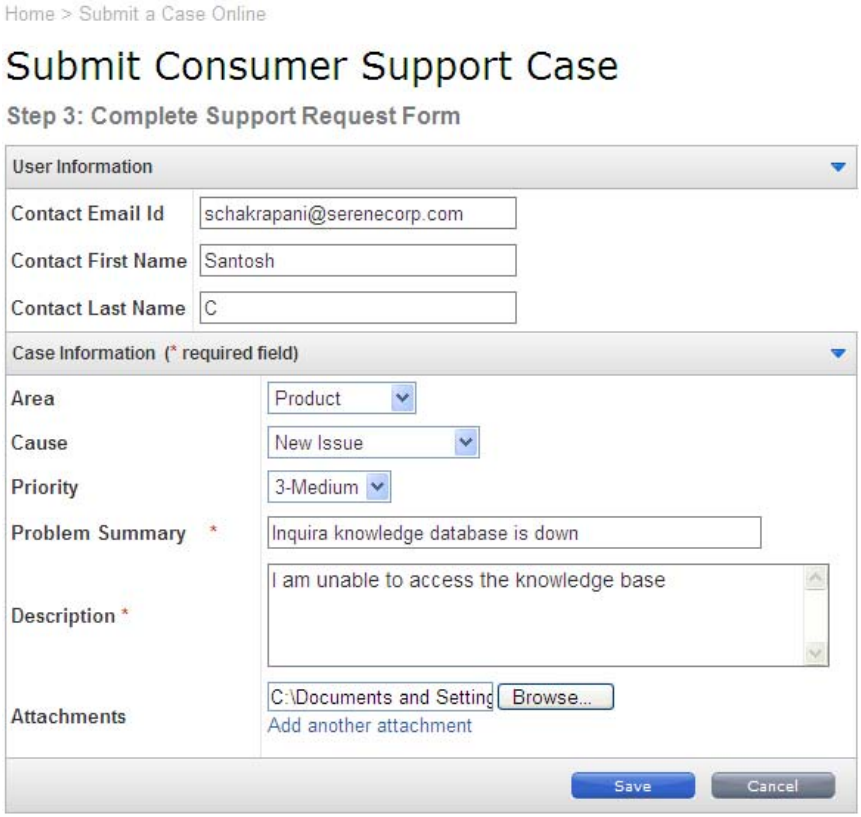
2 Enter the problem summary and click next



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



4 Enter case details and click on 'Save' button



5 Case is created and the message is shown

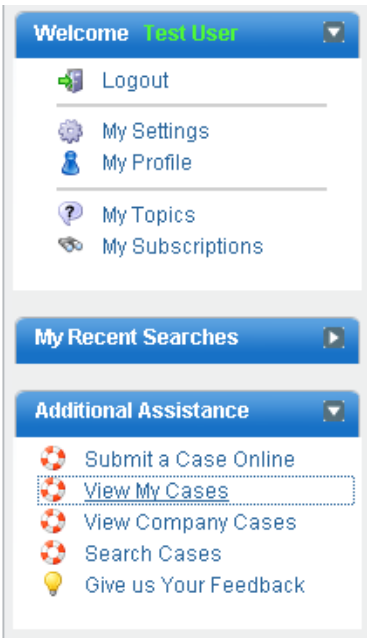
View My Cases

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

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

WALK-THRU

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



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

View My Cases

Previous Next

Support Case List

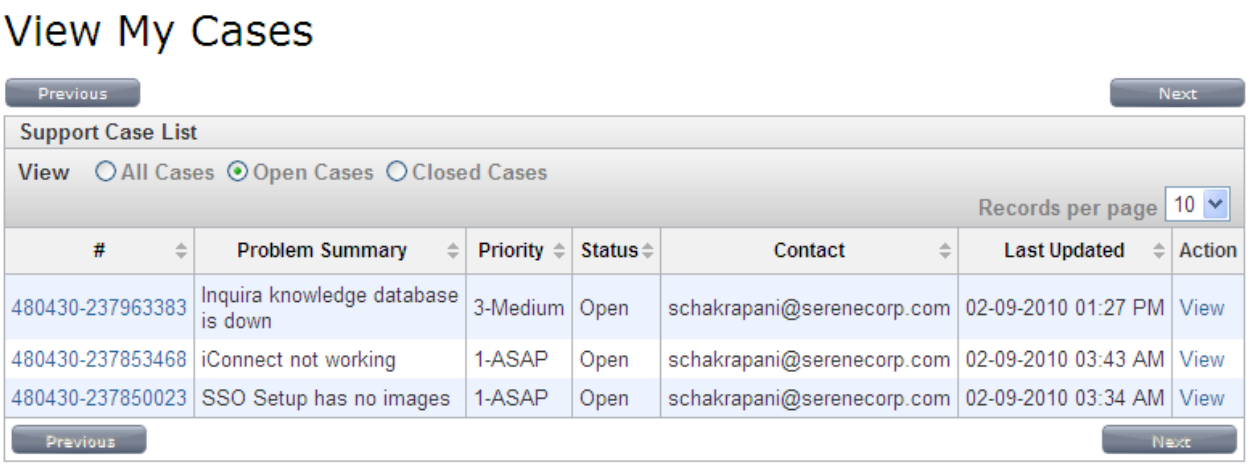
View ◉ All Cases ○ Open Cases ○ Closed Cases

Records per page 10

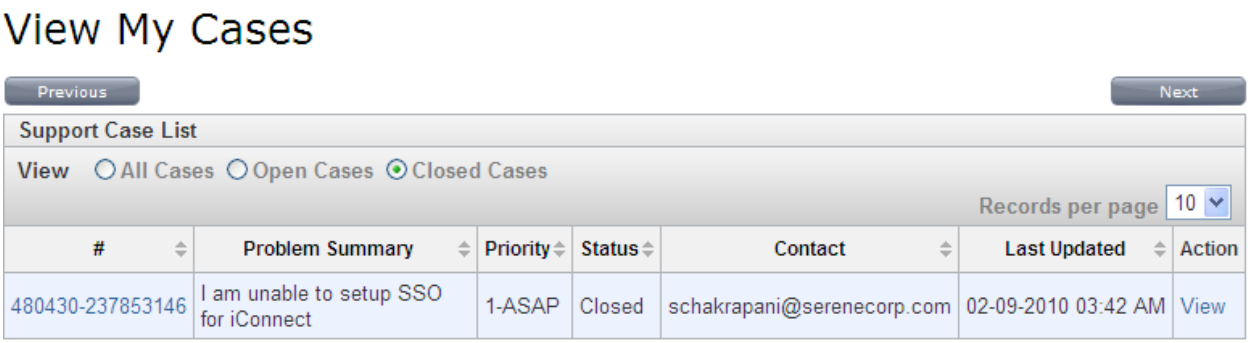
#	Problem Summary	Priority	Status	Contact	Last Updated	Action
480430-237963383	Inquira knowledge database is down	3-Medium	Open	schakrapani@serenecorp.com	02-09-2010 01:27 PM	View
480430-237853468	iConnect not working	1-ASAP	Open	schakrapani@serenecorp.com	02-09-2010 03:43 AM	View
480430-237853146	I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

Previous Next

To view only Open Cases, click on the ‘Open Cases’ radio button



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



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

Sorting

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

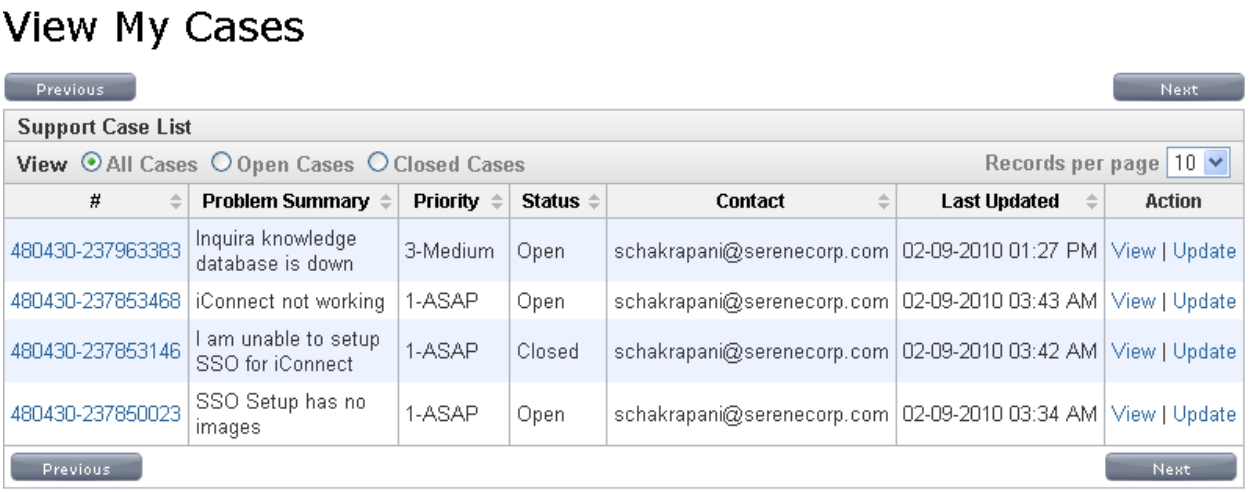
Pagination

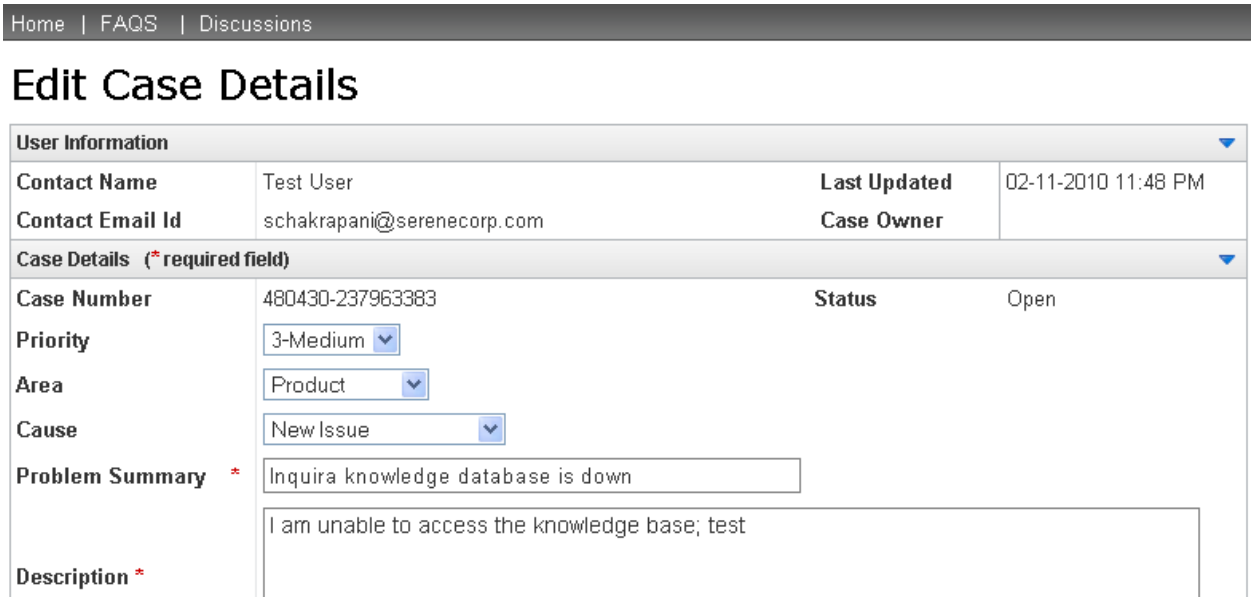
If the number of cases exceeds the limit set by 'Records per page', the results will be paginated. User can navigate using 'Previous' and 'Next' buttons. If there are additional pages, the 'Next' button will be rendered blue and if there are no additional pages the 'Next' button will be grayed out. The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

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

WALK-THRU

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





View Company Cases

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

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

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

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

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

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

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

Sorting

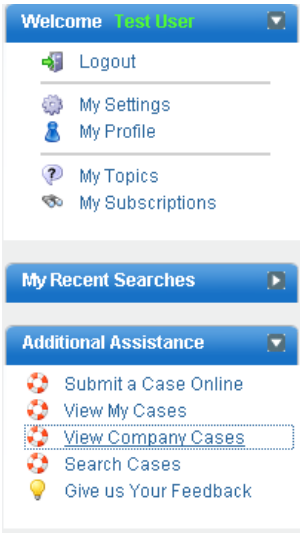
By default, the records are sorted in descending order by Case Number. Users can sort the records by #(Case Number), Problem Summary, Priority, Status, Contact and Last Updated. Note that sorting will sort the complete result set rather than sorting the list of records on the current page. So if the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

Pagination

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

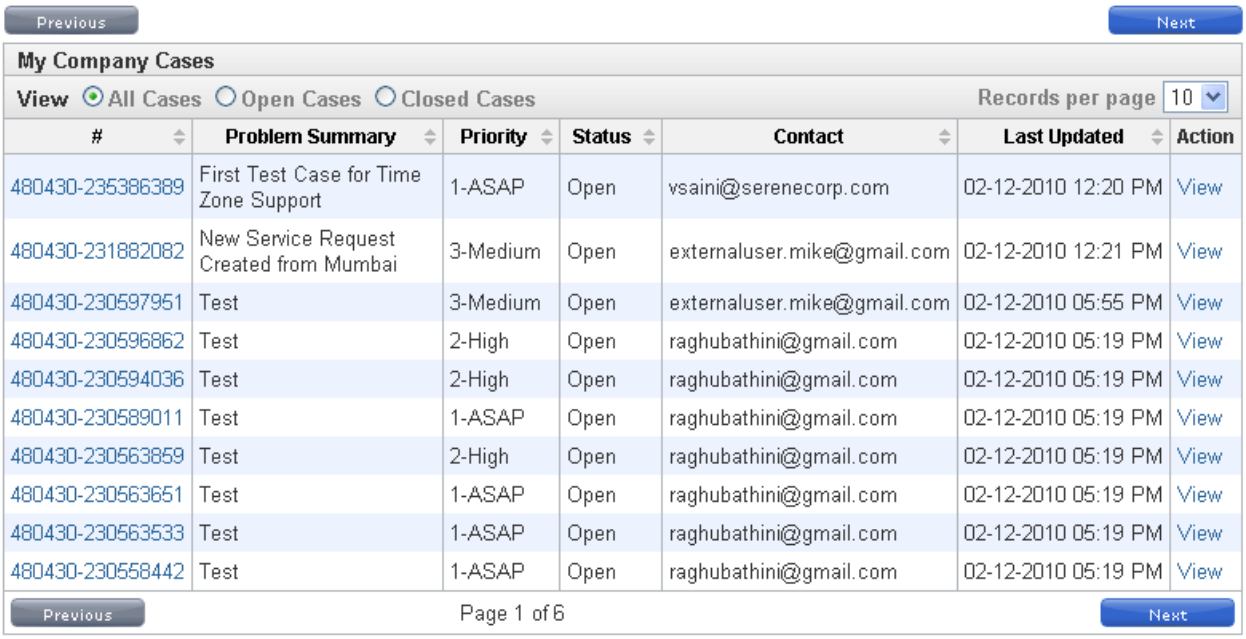
WALK-THRU

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



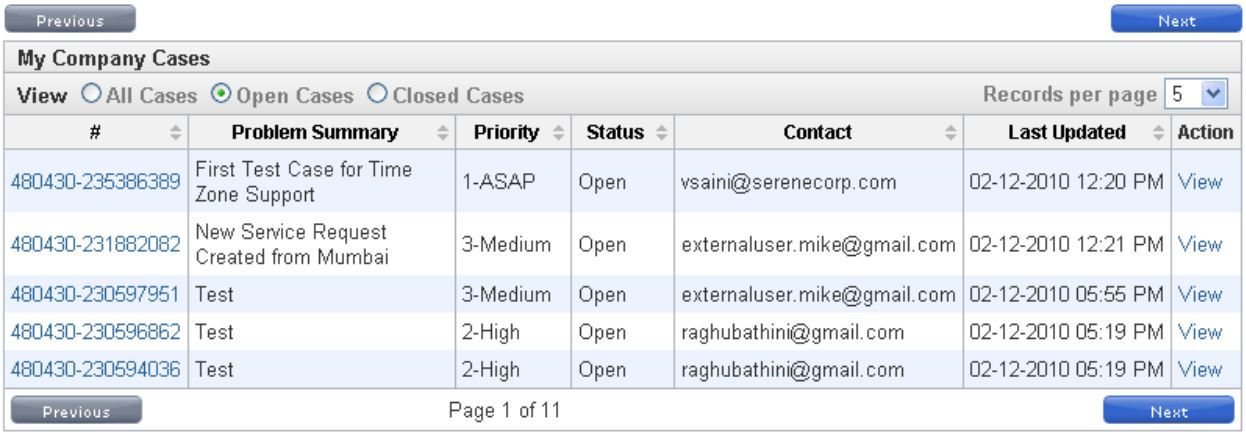
By default, latest 10 cases will be shown (Sorted by Case # in descending order)

View Company Cases



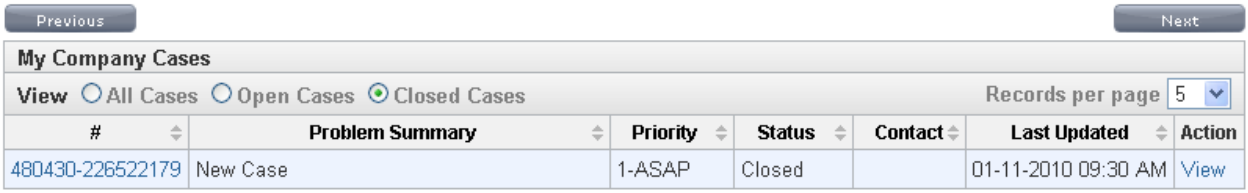
To view only Open Cases, click on the 'Open Cases' radio button

View Company Cases



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

View Company Cases



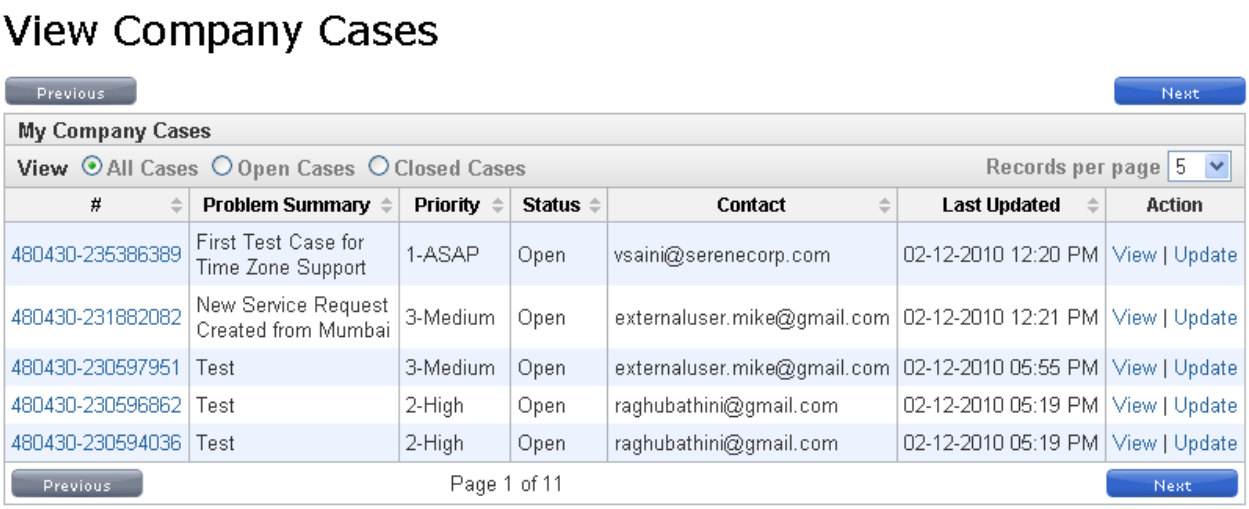
To limit the number of cases presented at a time, user can change value of 'Records per page' dropdown. The allowed values are 2, 5 and 10.

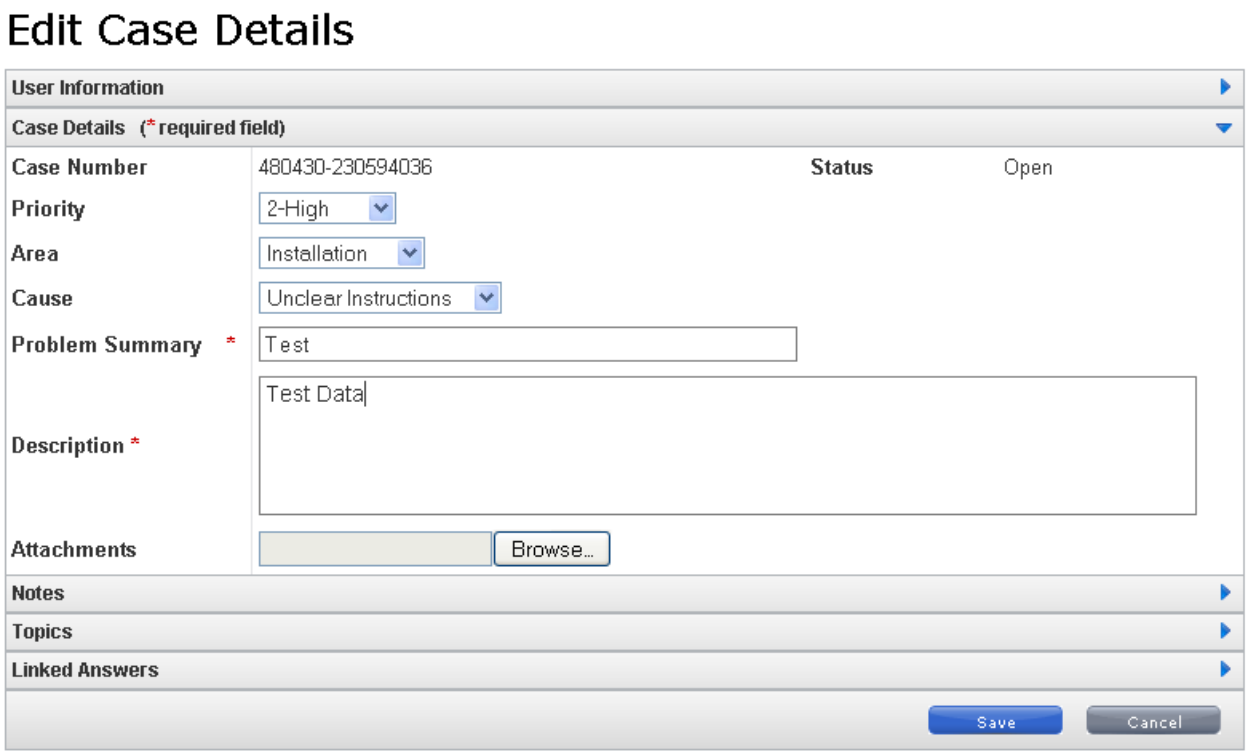
If the users have company case update capability, they will be able to update open cases.

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

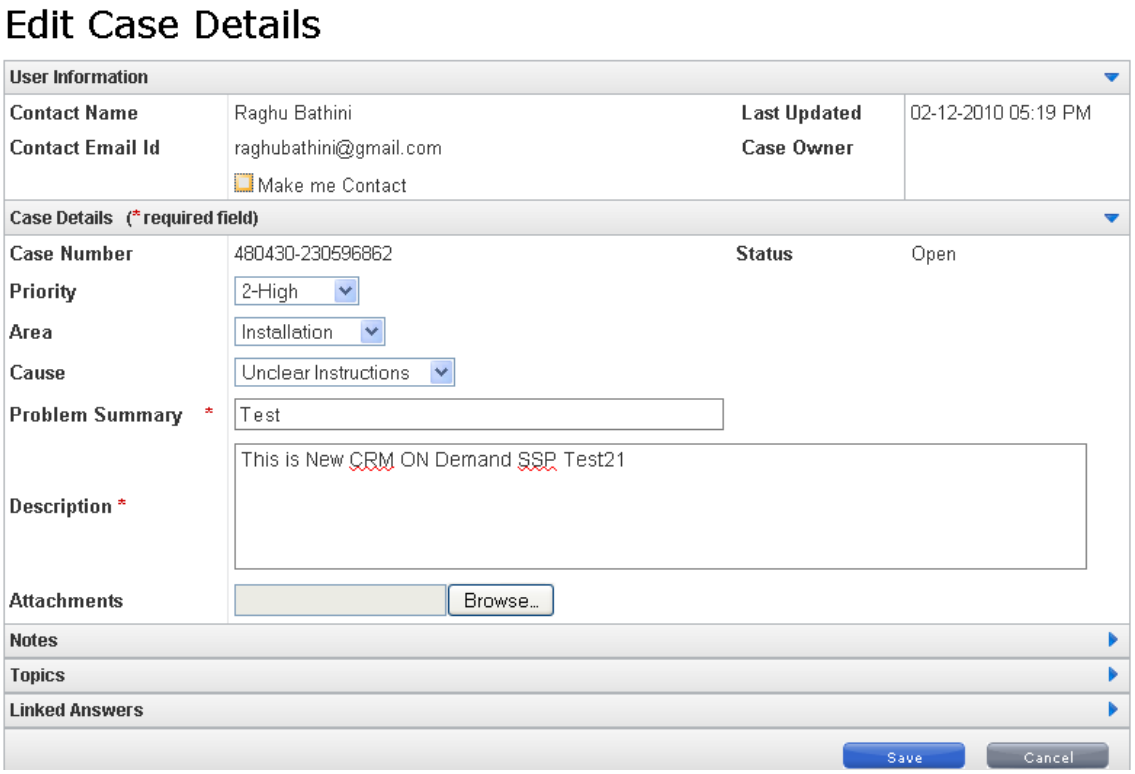
Additionally user can also assign himself/herself as a contact if the case belongs to somebody else by clicking the 'Make me Contact' checkbox.

WALK-THRU

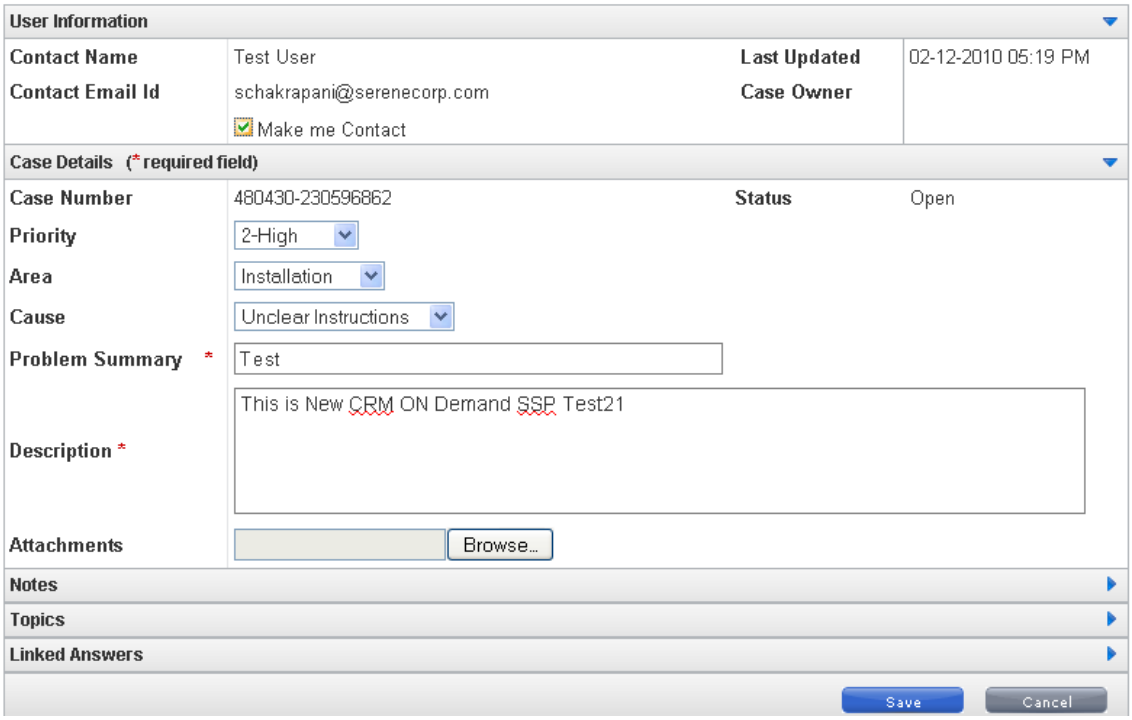




Before: Case Belongs to a different user

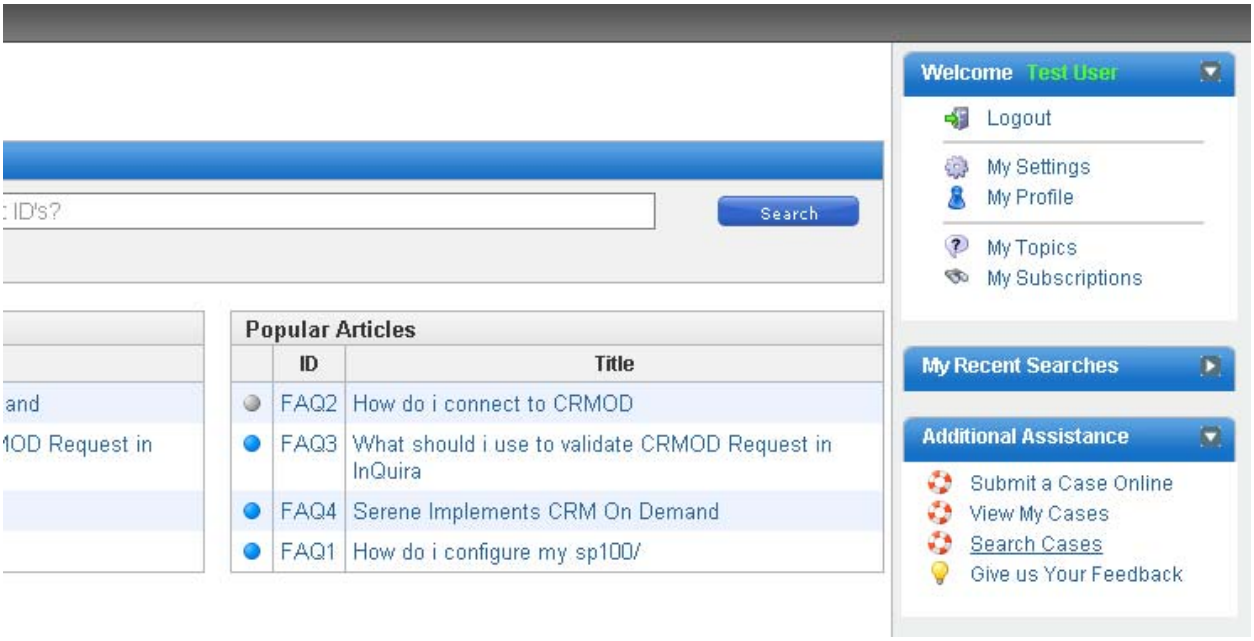


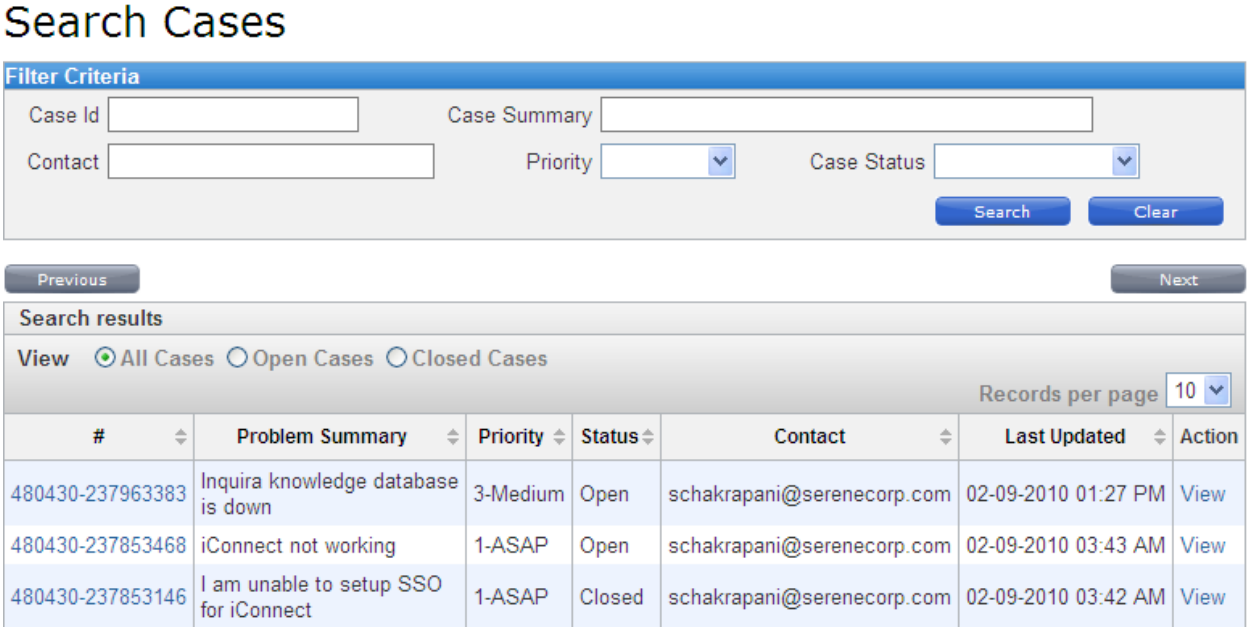
Select the Make me Contact checkbox and click on ‘Save’ Button. The contact of the case is updated to the logged in user.



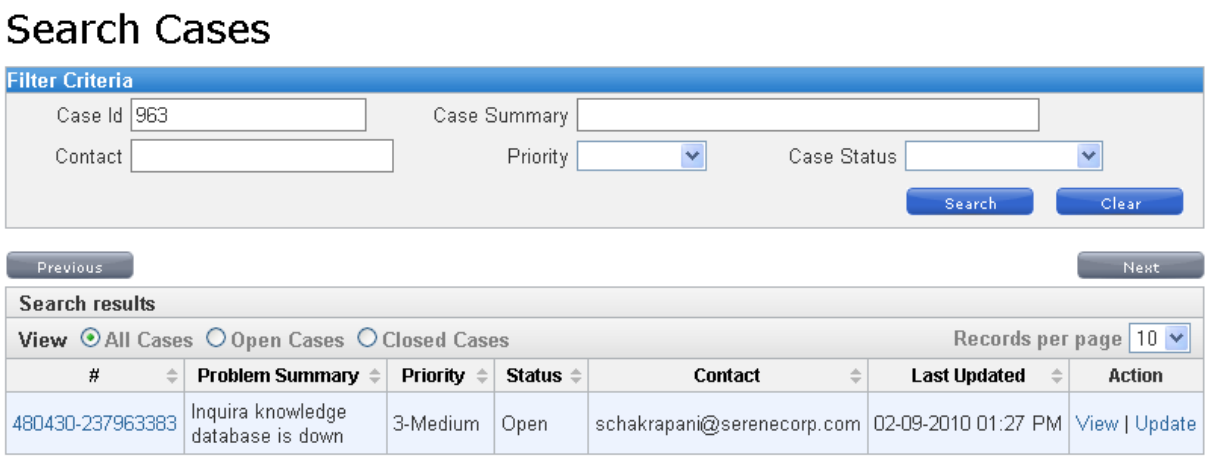
Search Cases

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

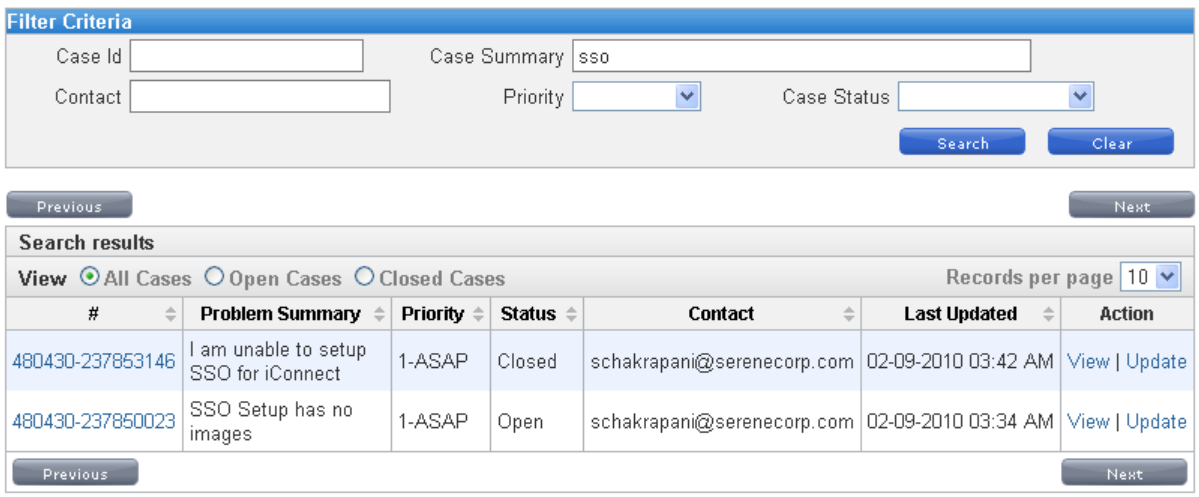




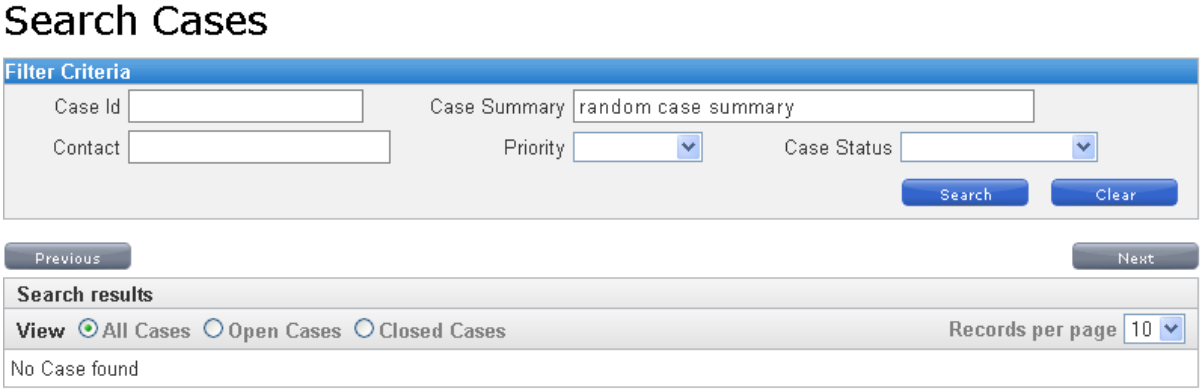
Example: searching for a Case that contains the numbers '963' in the Case Id



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



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

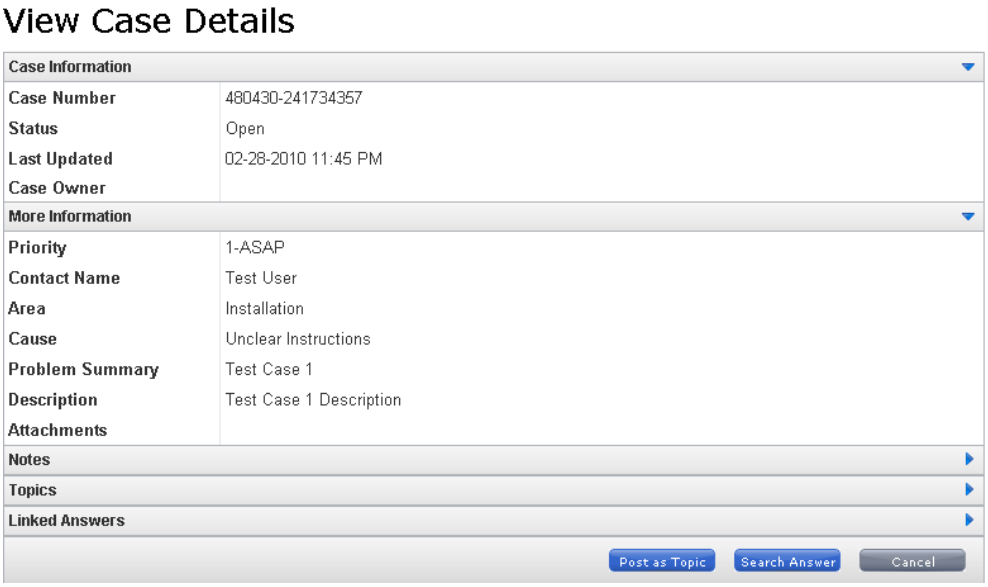


View / Update Case Detail

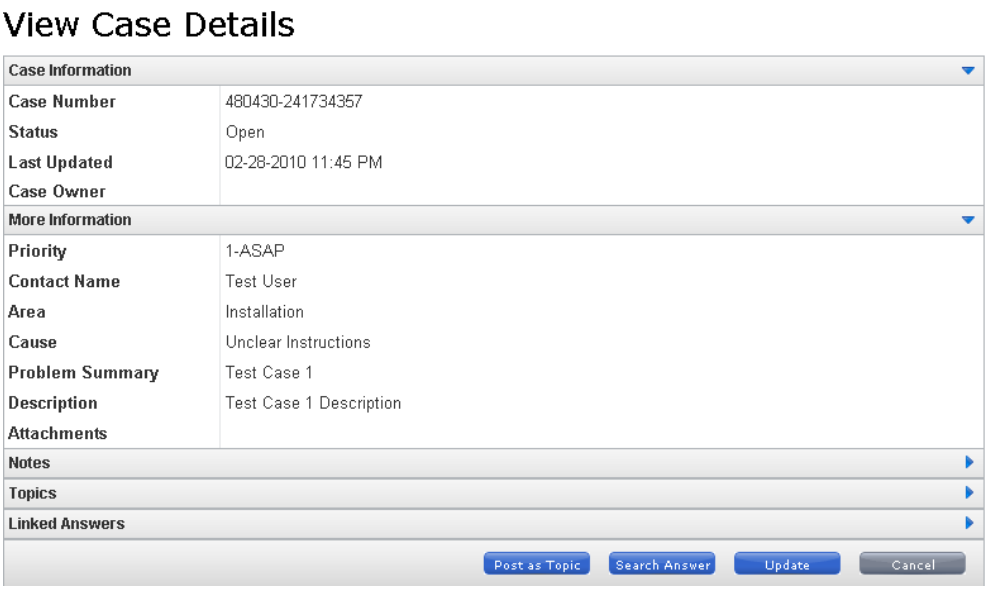
Users can view case information if they own the case; similarly users can update case information if they own the case and in addition have access to update own cases. From the view page, users can post case as topic to the community; they can find answers from the knowledge base from the case context

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

Example: User with no update access

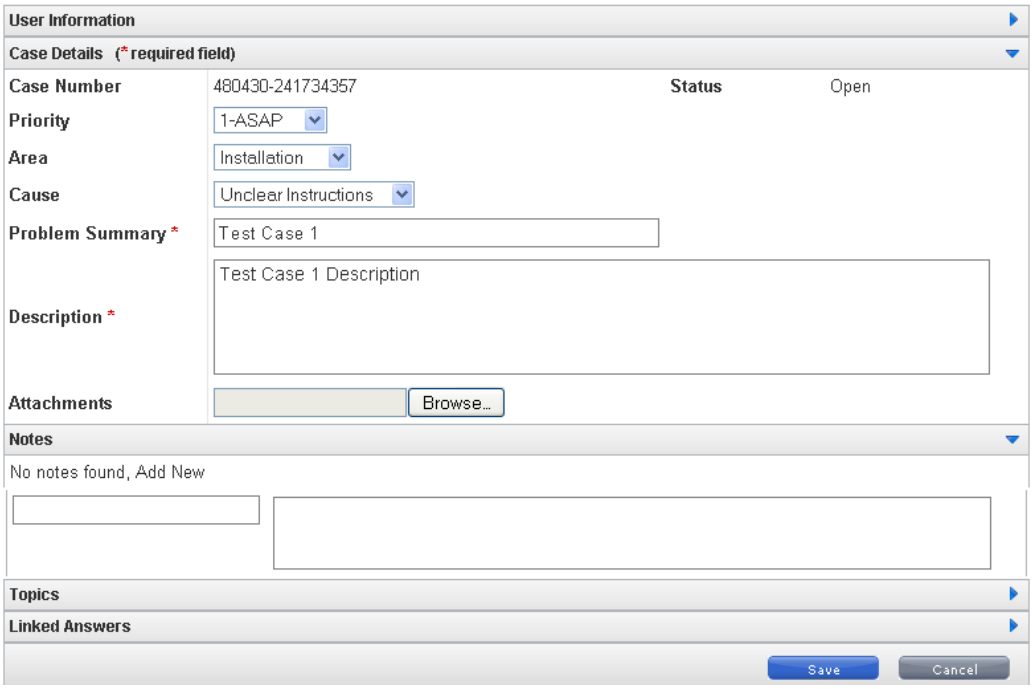


Example: User with update access



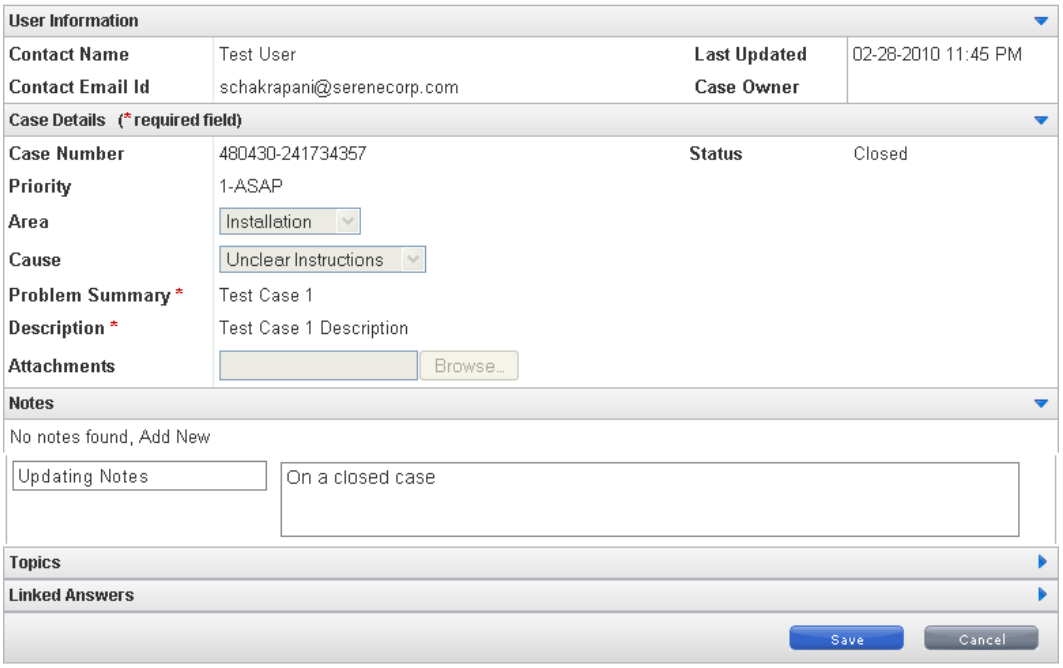
User can update fields allowed by the administrator

Edit Case Details



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

Edit Case Details



Post Topic to Community

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

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

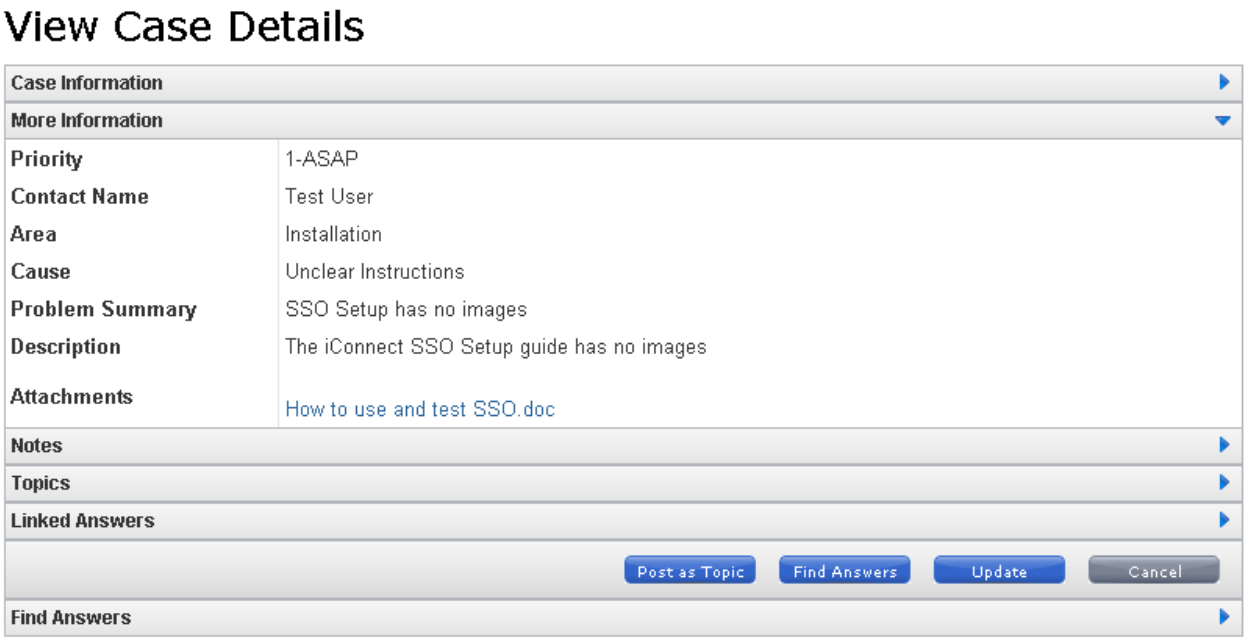
Clicking on a category will navigate to another page where user can click on the ‘Post New Topic’ link.

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

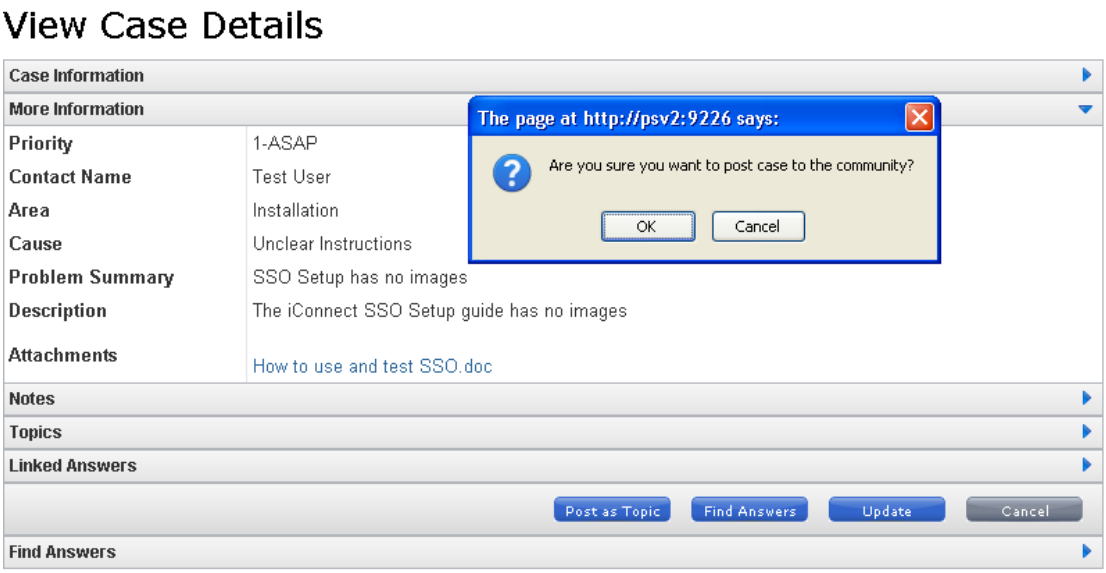
Once users post their message, it will take them back to list of topics. Additionally, the parent window of the browser is refreshed if the topic was successfully posted. The topic section in the View Case Details’ will allow users to see any responses made to their topic.

WALK-THRU

1 Click on ‘Post as topic’

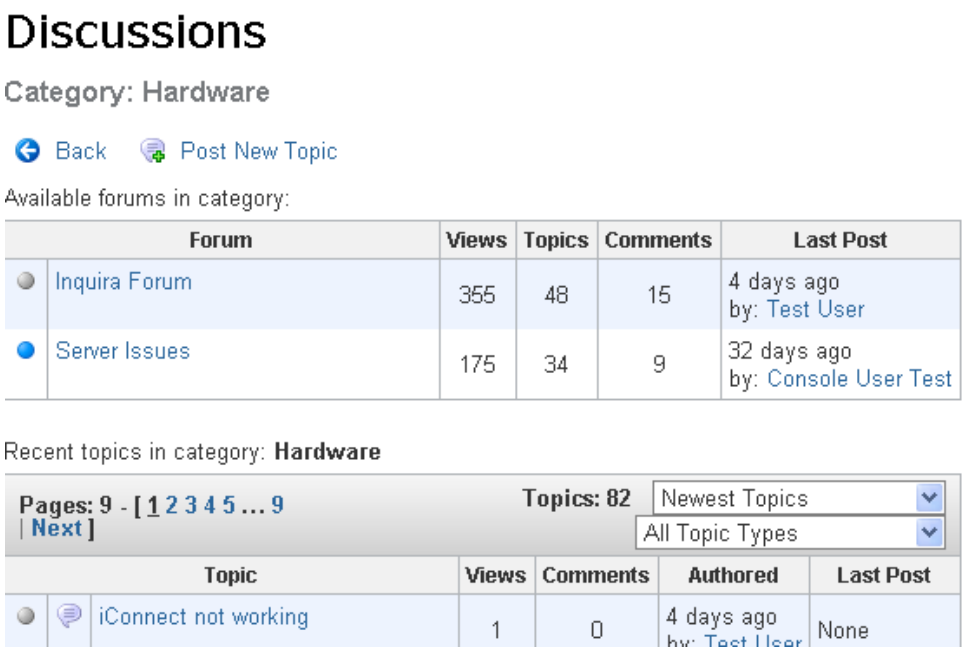


2 Confirm the selection when the application prompts

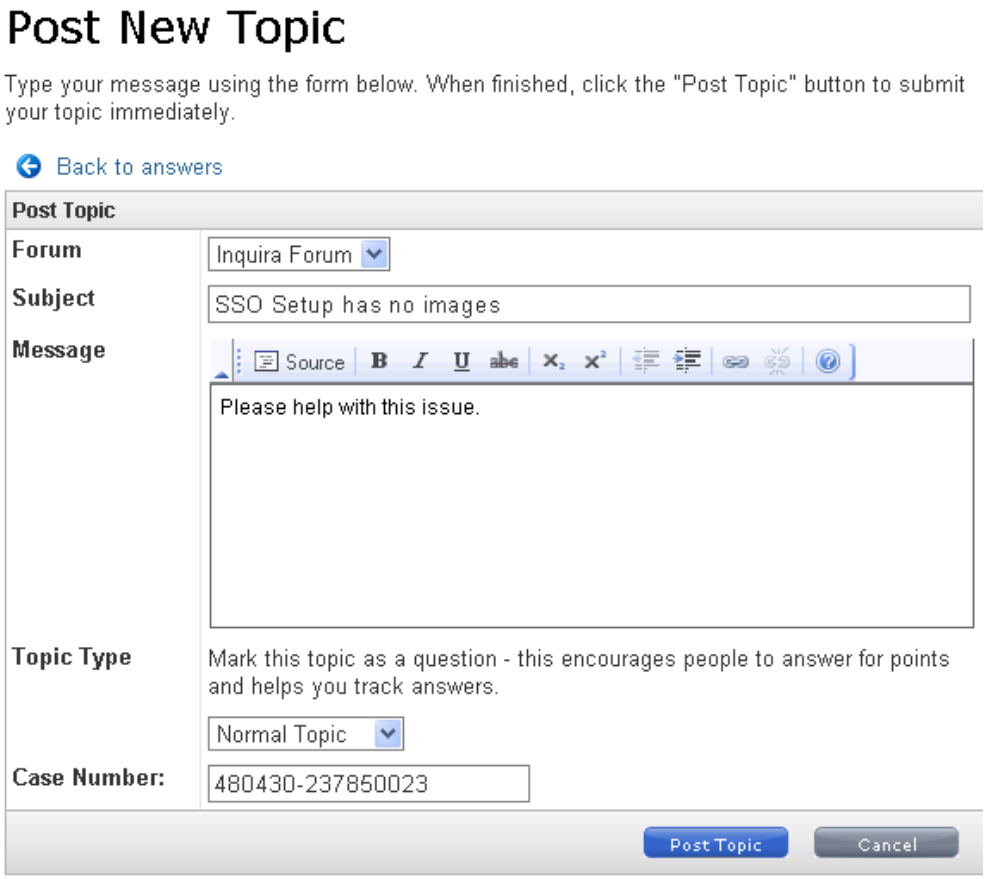


3 Select a Category under a discussion forum

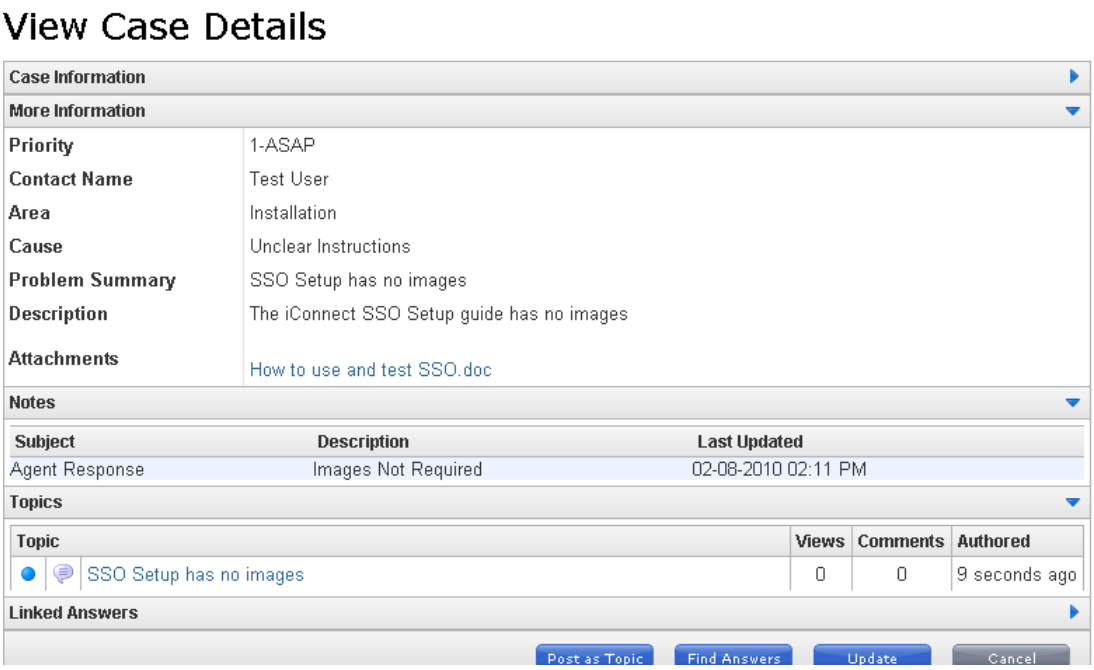
4 Click on Post New Topic link



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



6 Close the window. The ‘View Case Details’ page should list the newly posted topic.

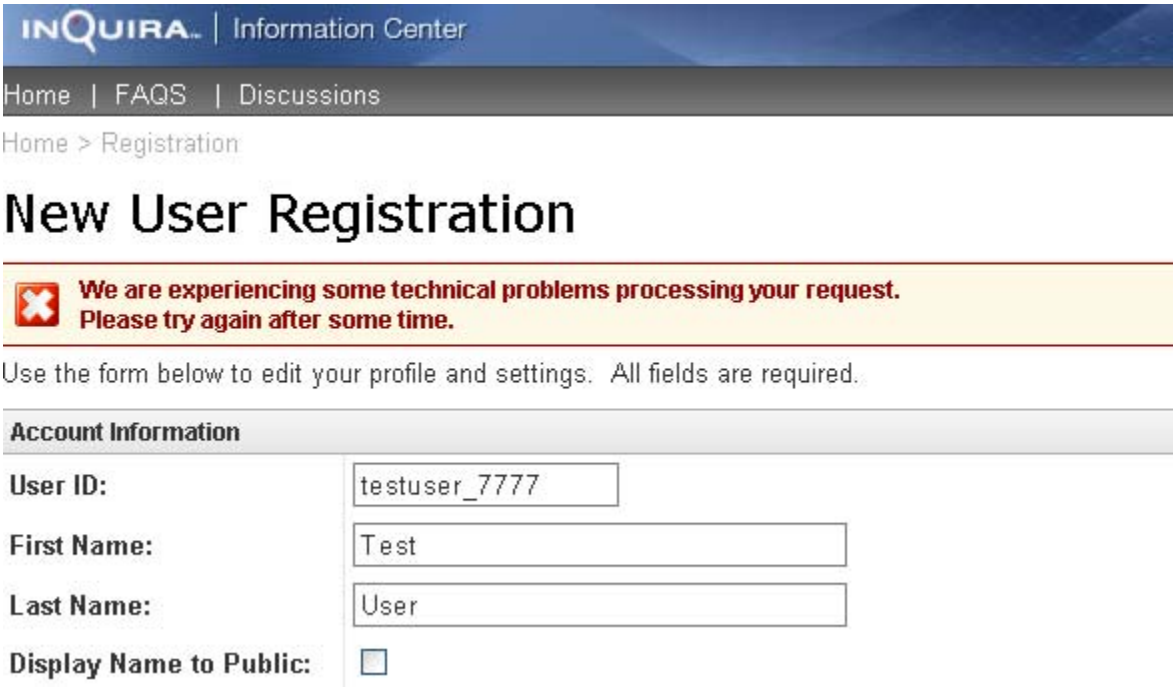
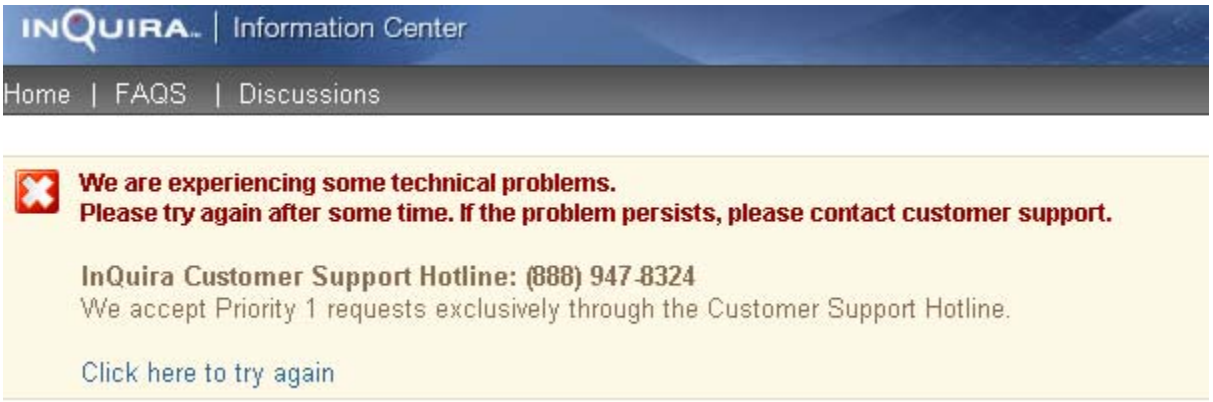


APPENDIX A

Outages

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

Error messages user may see during registration:-



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