RightNow Customer Portal Design and Dynamic Agent Desktop Administration

Duration: 2 Days

What you will learn

The RightNow Customer Portal Design and Dynamic Agent Desktop Administration introductory course covers key foundational administration topics within the latest generally available version of Oracle RightNow CX Cloud Service. This lecture and lab-formatted, hands-on course is ideal for the new administrator or those wanting to brush up on their core administration skills.

In this course, you will learn how to utilize the Customer Portal (CP) framework to modify your customer service web pages. You will leverage the reference implementation and learn how to utilize the robust library of widgets that can be used to further your customers' experience. You will also receive core knowledge you need to configure the Dynamic Agent Desktop, including setting up basic scripts and workflows for your agents to use daily.

Learn To:

Make and deploy basic changes to your CP pages

Build Agent Scripts and Desktop Workflows

Configure Guided Assistance for agents and customers

Leverage standard Customer Portal features, such as widgets and pages

Use Adobe Dreamweaver and WebDrive as your primary tools to modify CP pages

A Live Virtual Class (LVC) is exclusively for registered students; unregistered individuals may not view an LVC at any time. Registered students must view the class from the country listed in the registration form. Unauthorized recording, copying, or transmission of LVC content may not be made.

Audience
Functional Implementer
Sales Consultants
Support Engineer
System Administrator
Technical Administrator
Technical Consultant
Web Administrator

Related Training

Required Prerequisites

RightNow Customer Service Administration

Suggested Prerequisites

Understanding basic HTML, CSS

Use or Remove Widgets and Variables on a Page/Template
Change Widget Attributes
Configure Dreamweaver Site to Use WebDAV Protocol
Access Tag Documentation
Find and Add Tags in Pages/Templates
Deploy Site Changes to Production
Create Workspaces
Create Agent Scripts
Design and Develop a Desktop Workflow
Configure Guided Assistance
Utilize CP Site Administration Pages
Configure Oracle RightNow CX Cloud Service for CP Use
Navigate Oracle RightNow CX Site Files in Dreamweaver
Apply an Existing Theme to a Site

Course Topics

RightNow Customer Portal User and Design Introduction
Using Customer Portal Web Self-Service
Understanding CP Terminology
Using Customer Portal Components (Themes, Templates, Pages, Assets, Sprites)
Understanding how CP is applied in Mobile page sets
Using Reports on CP pages

Using the Customer Portal Framework
Setting up Adobe Dreamweaver and WebDrive with CP
Viewing Environments
Navigating the CP File Directories
Using CP Help Resources
Modifying Themes, Templates, Pages, and Widgets
Using Assets and Sprites
Applying basic CSS (cascading stylesheet) changes

Site Deployment
Testing Changes in Development Mode
Staging and Promoting Files to Production
Understanding Rollback Options

Oracle RightNow CX Dynamic Agent Desktop Administration
Using Agent Scripts, Desktop Workflow, and Guided Assistance
Creating Workspaces
Creating Agent Scripts
Designing and Developing a Desktop Workflow
Configuring Guided Assistance
Knowing When to use Each Tool