SHA INTRA SF Installation & User Guide

May 2023

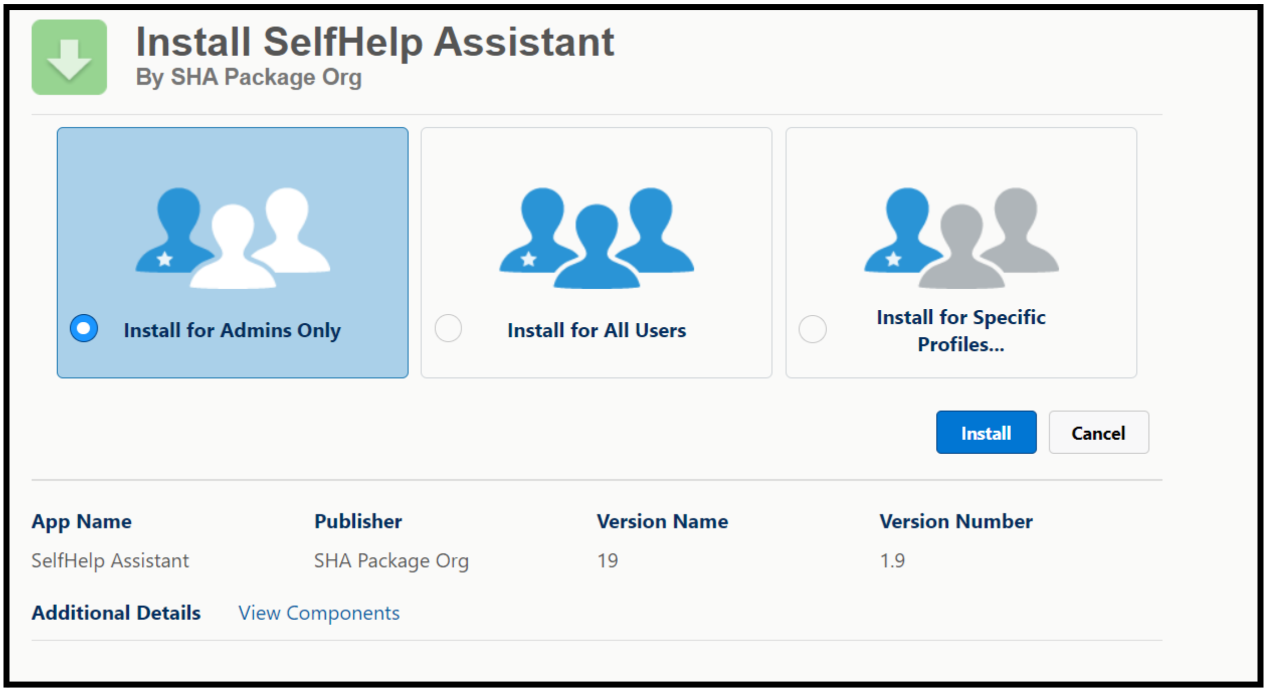
Installation Guide

Package Information

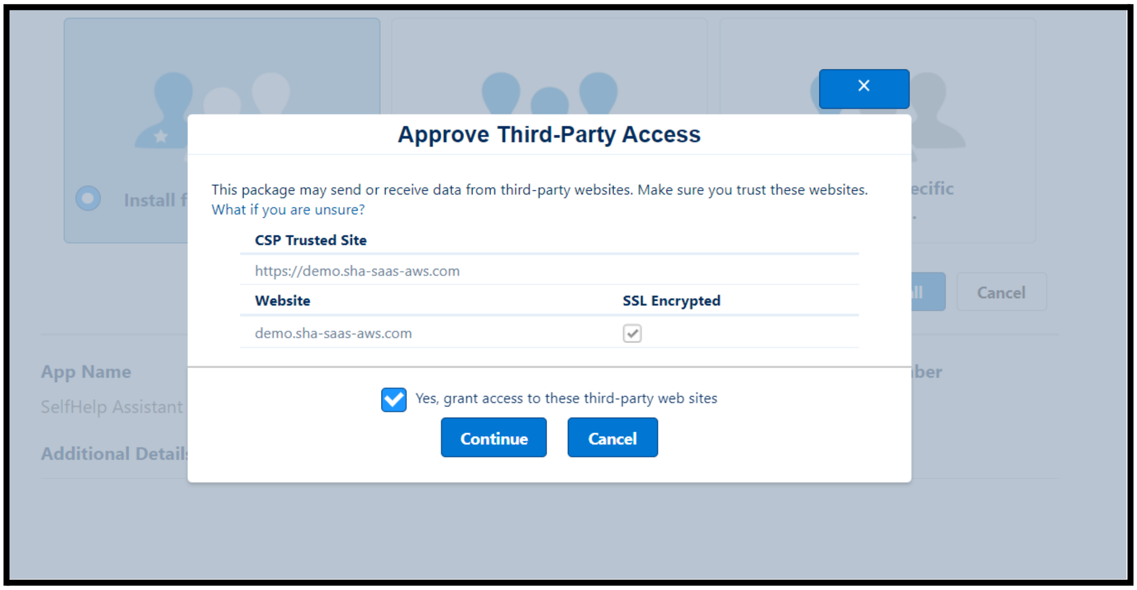
- Package Installation URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4x000000R8c4 (to install the SHA Intra package on sandbox org, replace https://login.salesforce.com with https://test.salesforce.com)

Installation Steps

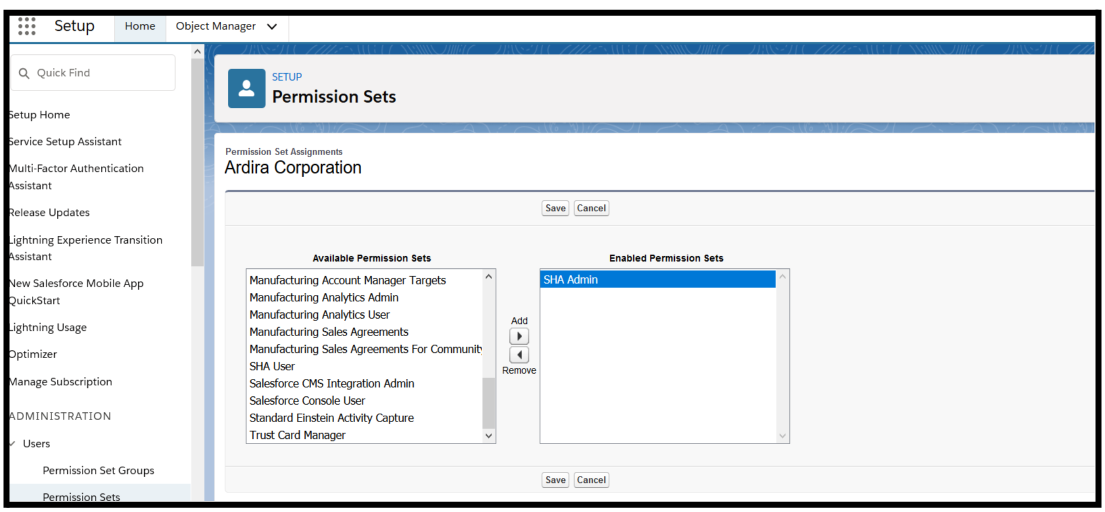
- **Step 1**: Copy and paste the package installation URL in the browser's tab and press Enter



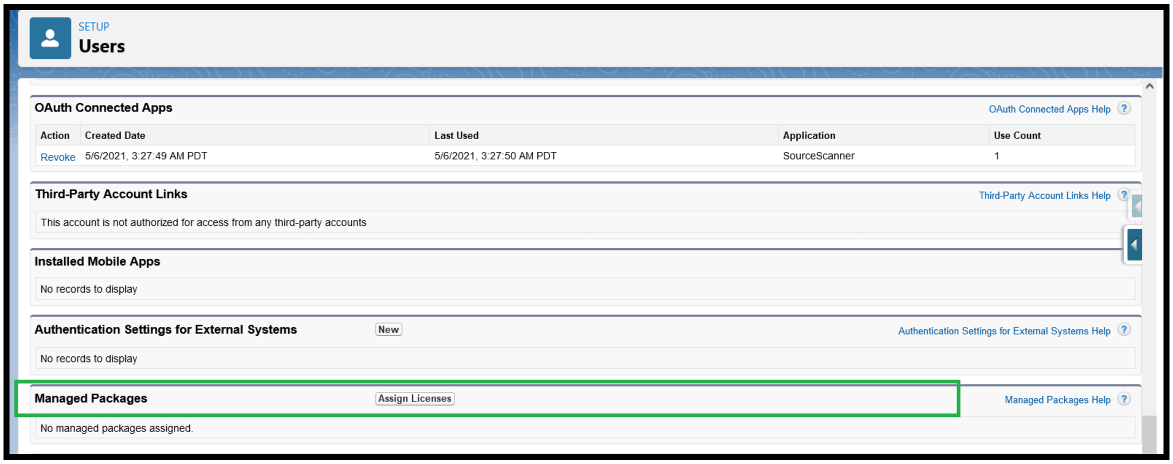
- **Step 2**: Install package for Admins Only and select the checkbox of 'Yes, grant access to these third party web sites'.
  [**Note**: This party website access is required for SHA app back-end access]



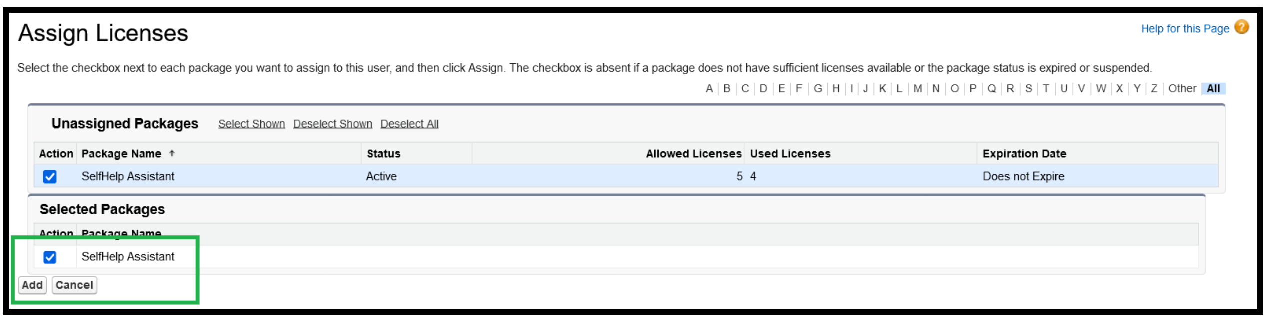
- **Step 3**: Once installation process is done then assign SHA permission sets to the users
    - Admin User: Assign SHA Admin Permission Set
    - Visitor User: Assign SHA User Permission Set



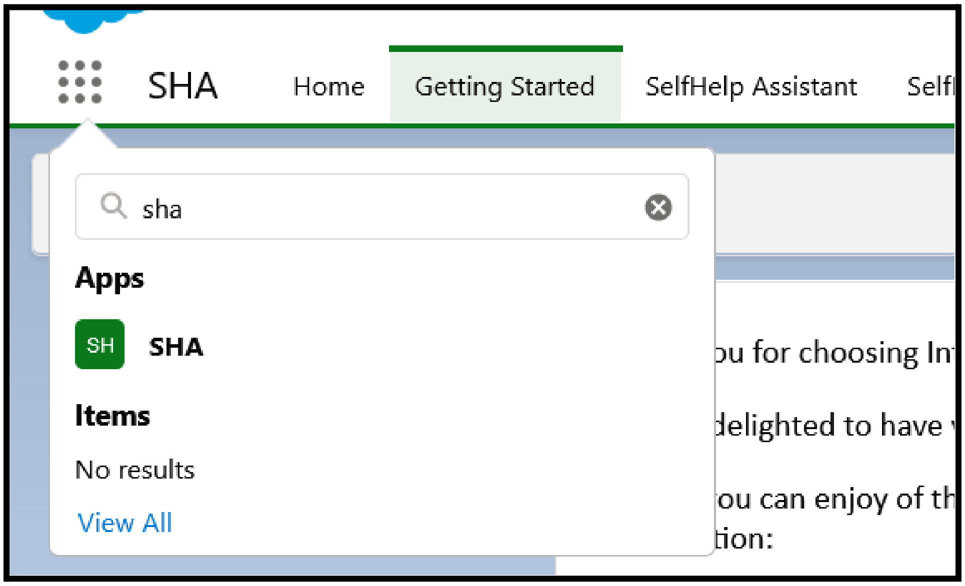
- **Step 4:** Go to the respective user record and assign “Managed Packages” License.



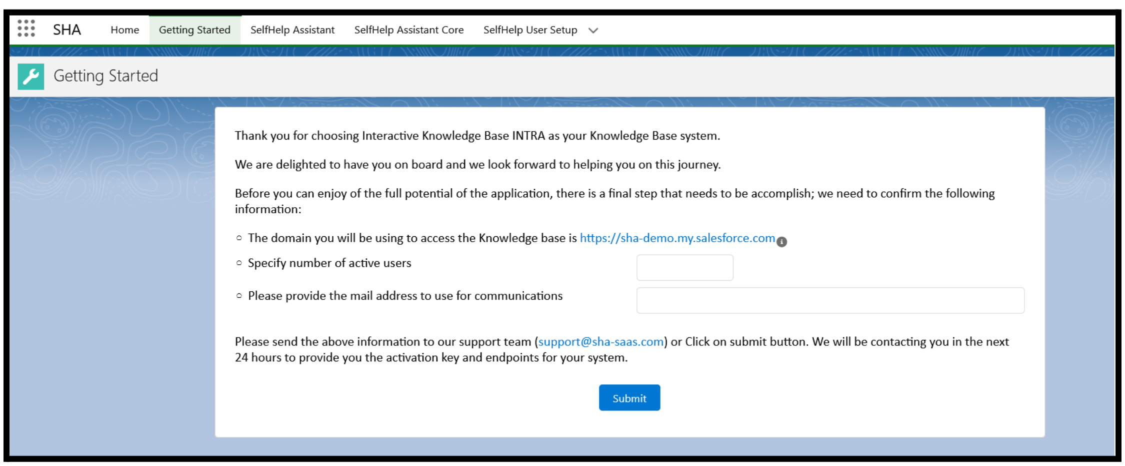
- Select “SelfHelp Assistant” Package and click on the “Add” button.



- **Step 5:** Login with the user, to whom “SHA Admin” permission set is assigned, open “SHA App” from the App Launcher and click on “Getting Started” page

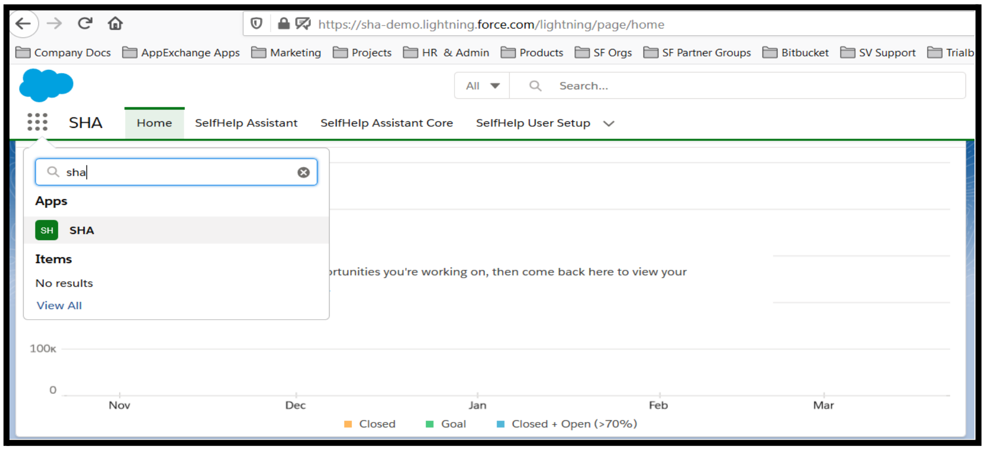


- As specified in the “Getting Started” page request number of users license to “SHA Support” and provide your mail address for communications.

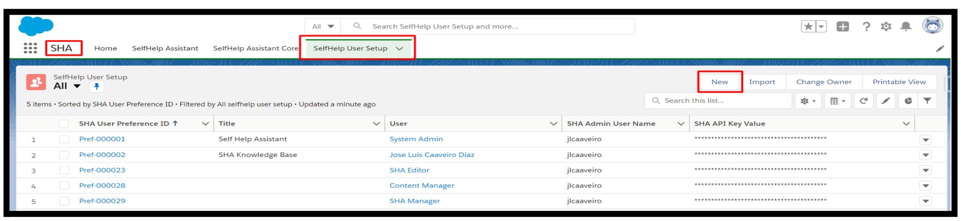


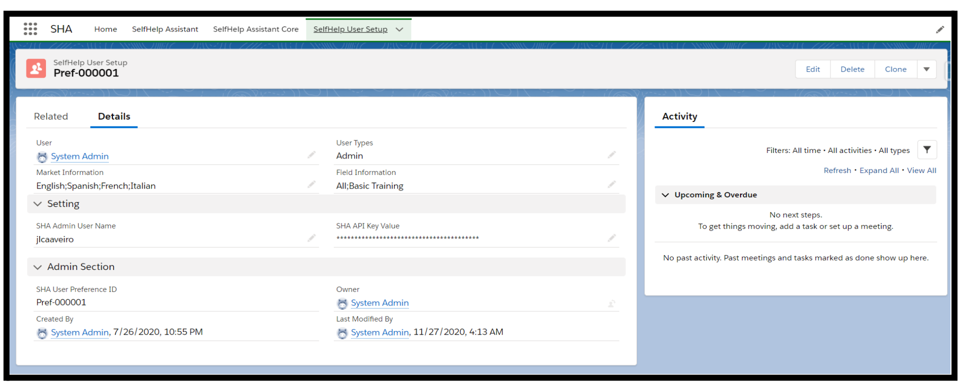
- **Step 6**: Once you receive confirmation message from “SHA Support” about the number of users licenses allocated, along with “SHA API Key Value” and “SHA Backend URL” information , follow below steps.
  - Login with the user, to whom “SHA Admin” permission set is assigned and create SHA preference record for the user
  - To create SHA preference record follow below steps:

- Click on SHA Application from App launcher



- Then click on the SelfHelp **User Setup tab** and click on the new button and fill in the details. See below snapshots for the same.





○ User: Set user to whom you are creating preference record
○ User Type: Set user role in the system
○ Market Information: Set markets for the user
○ Field Information: Set field information for the user
○ SHA Admin User Name: Set SHA Admin username (**SFadmin**)

- SHA API Key Value: Enter SHA API key value that is provided to you (API key is same all users in the same Org)
- SHA Backend URL: Enter the SHA Backend URL that is give to you (without SHA Backend URL user not able to access SHA backend)

User Guide

SHA INTRA system is formed by two main working areas:
- **Front Office** and
- **Back Office**

The Front Office is the part of the application that is integrated into the clients' Salesforce Org and allows interaction with the contents managed by the Back Office.

First, we will describe the operation of the "Front Office" area.

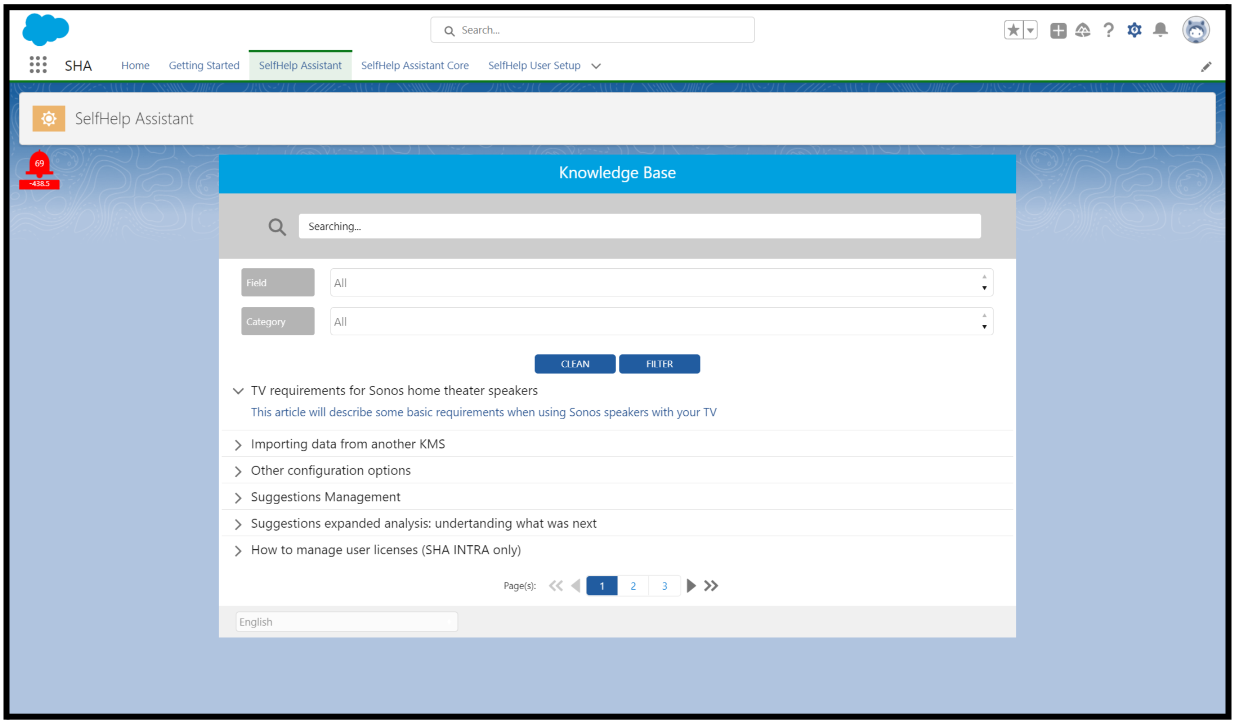
Front Office

Working with Front End

SHA front end is the software that is integrated into the Salesforce Org of the clients. Its appearance is fully adapted to the "look & style" of it, although the operating structure is directed by the SHA software.

To illustrate the operation of this part of the application we will use SHA SelfHelp Assistant tab, incorporating some of its contents into the example.

Once you click on SelfHelp Assistant tab you get access to the Main area of front end, with the following aspect:



Screen organization is always the same:

1. A superior area of search, with a system of suggestions implemented for running queries that works with several "full text" algorithms.

2. Filter area, destined to the search by Knowledge Areas/Fields and / or Categories of the Thesaurus.

3. An intermediate area, in accordion format, which shows the list of outputs defined from the configuration parameters of the "Back Office". Also, the paging options for flipping back and forth between the results are displayed.

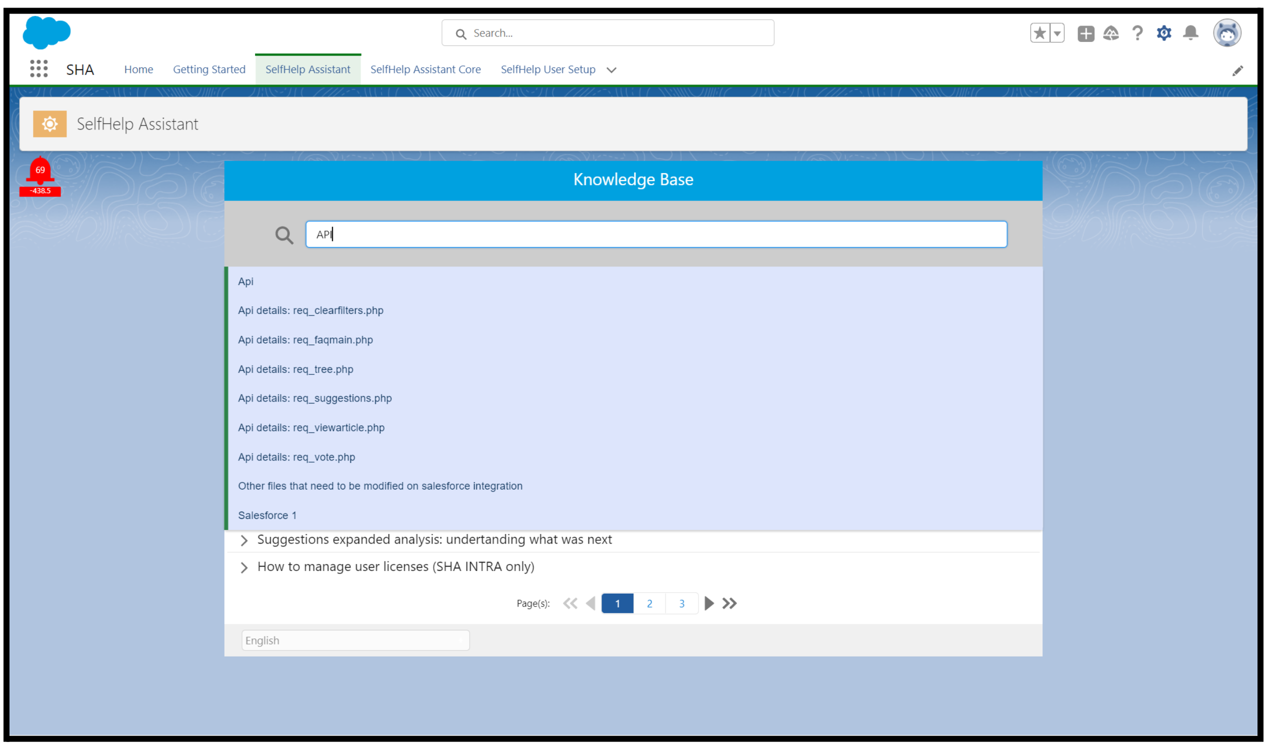
4. Action buttons: Clear (eliminates any selection on the screen) and Filter (executes searches based on the visitor's selections).

5. Language switch: allows you to change between languages you have access to.

6. Training status / switch in the top left side: by pressing on the bell training mode is activated/deactivated.

When a visitor types something in the search box, the system starts searching suggestions within the database. It is important to note that searches will be conducted only in natural language.

If the visitor selects a suggestion and then presses the Search button, the system will use its search algorithm and will show those articles that are more relevant and comply with the defined parameters from the Configuration section in the back office.



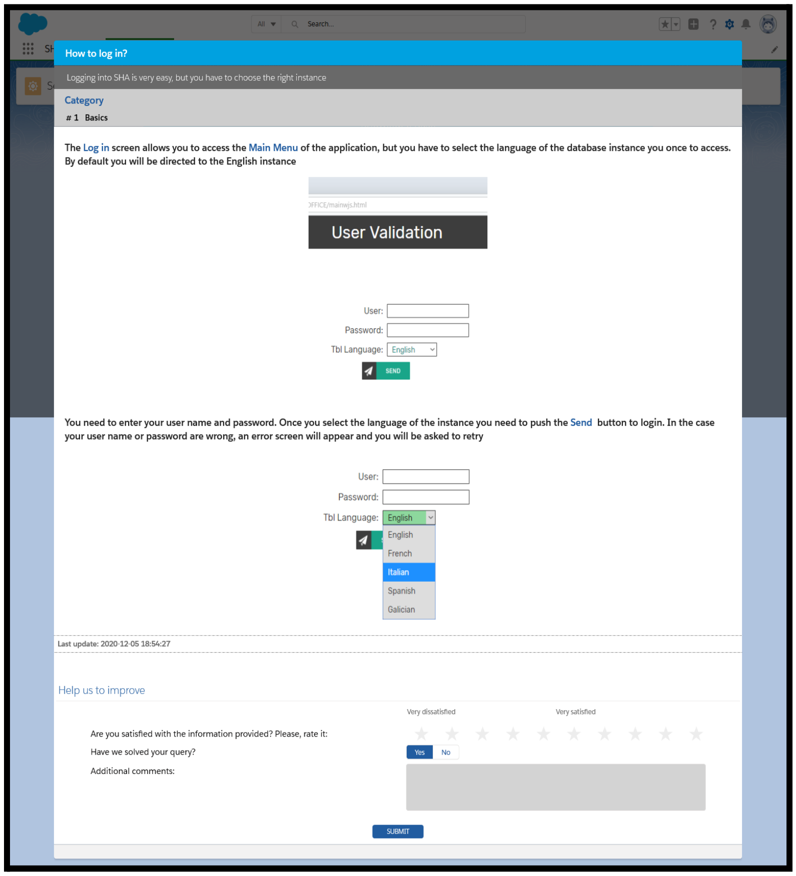
Searching algorithms will tend to eliminate the existing noise in the database (common, short, repeated words) and will help search for articles with a significant relationship with the search.

When the visitor wishes to carry out a search of contents considering areas of knowledge or categories, it has the help of the drop-down ones shown in the lower part of the screen that shows the available alternatives for a finer search:

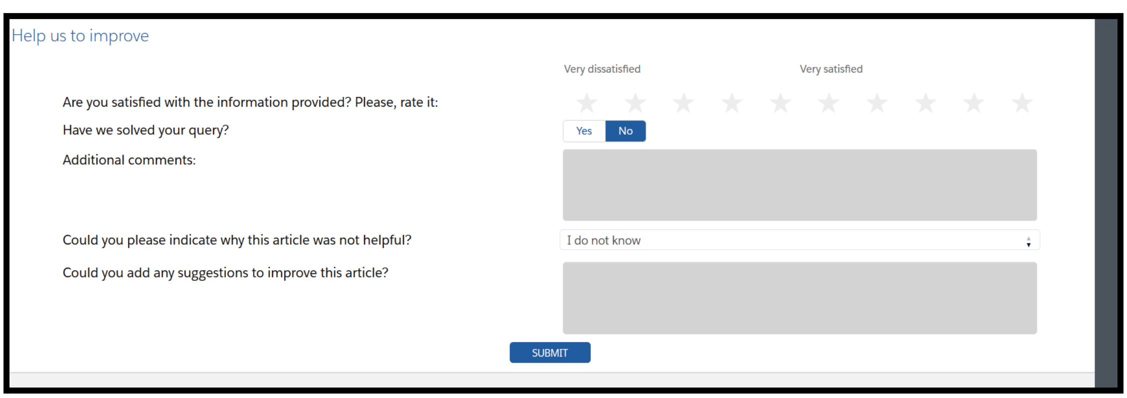
for example, in the image below observe the categories available for the search, being the same indented, depending on the nesting of categories within the Thesaurus.

So far, we have focused on searching for articles within the database, but you can access the content of them from this window. To do this, just click on the content of the accordion of any of them. The window that is offered can present two different versions:

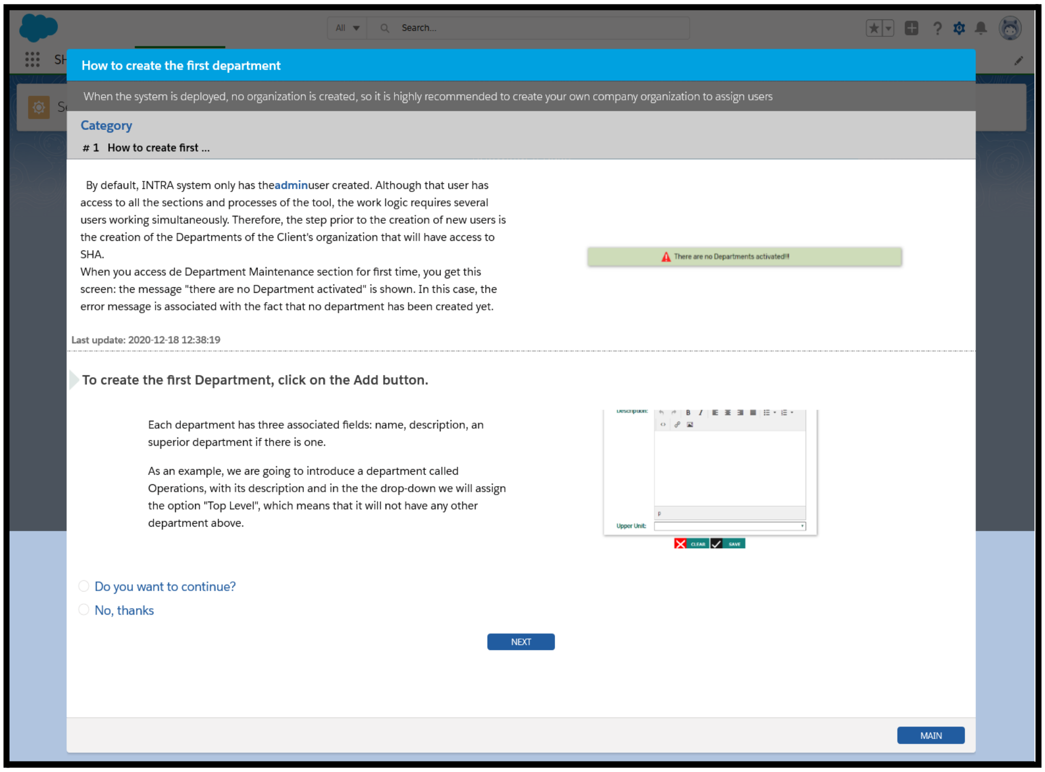
- First one, for those articles that do not have a Decision Tree, has only the basic information of the item: title, Content Area, Categories, content of the article and date of its last update. Likewise, in the lower part it shows a small customer satisfaction questionnaire in which an assessment of satisfaction with the information provided is required, from little satisfied (1) to very satisfied (10). Also, the visitor can declare if the information has been useful or not, and finally, fill in a free-text text field, with any comments you want. Finally, there is an action button to return to the previous screen of the front end.



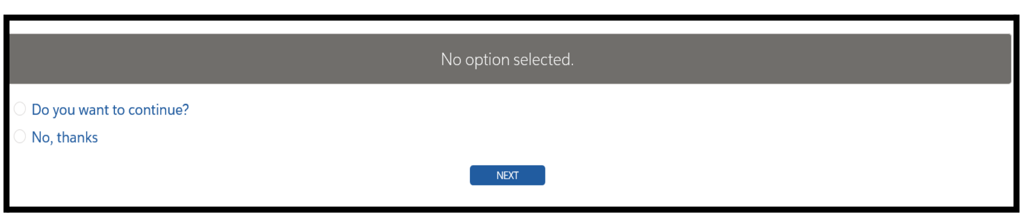
When the visitor fills the form, and the Backoffice has been configured properly, if “How we solved your query” button has been set to “No”, the extended form will be appearing, asking for additional information on why the article was able to solve visitor question, as described below:



- If the selected article has an associated Decision Tree, the appearance of the lower part of the screen will be slightly different:



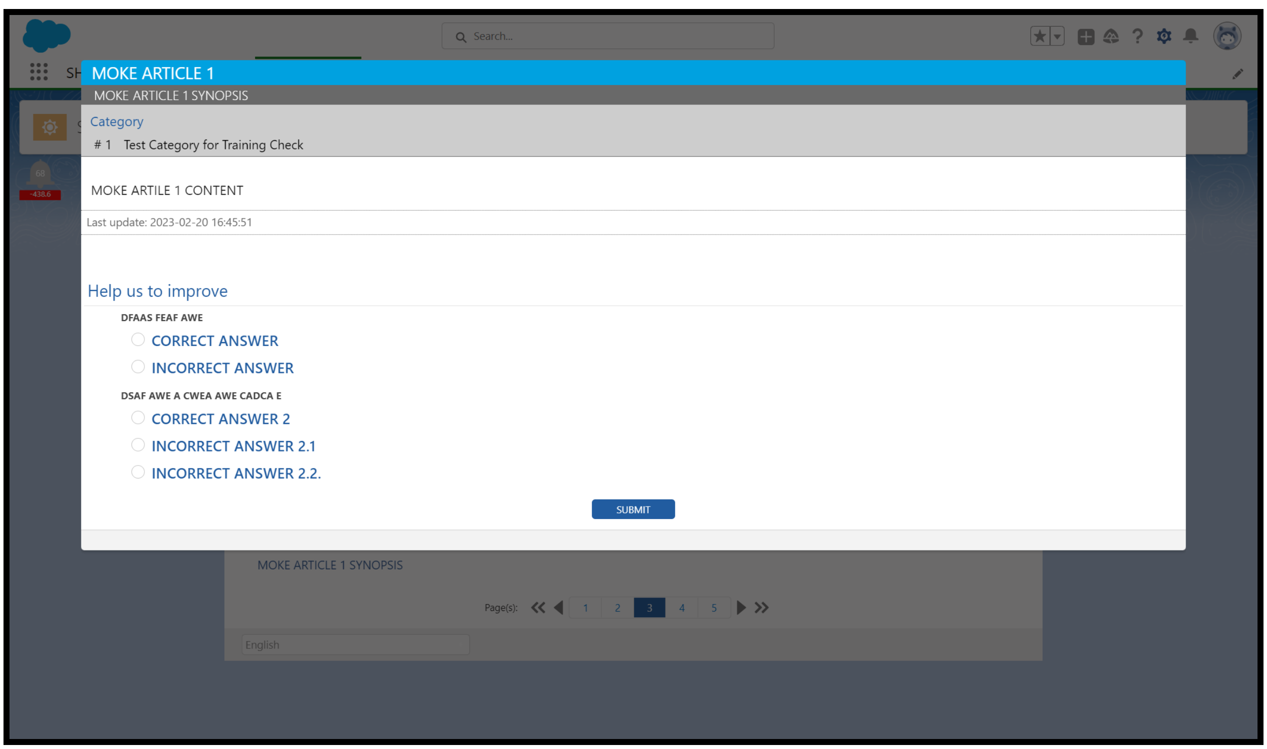
The first item / question of the tree will be shown with the associated options, each preceded by a radio button. Immediately below, two action buttons appear: the first one allows to continue to the next question, and the second one returns to the main screen of the front end. If by any chance, the visitor presses the first button without having selected any of the possible options, an error message is shown, as can be seen in the image below.



When the visitor clicks the action button with one of the selected potential responses, the application updates the "tree" data showing the next item / question with its associated answers as well as the previous answer and the selected option, as shown in the below image. The process is repeated throughout the "decision tree", until the end of one of its "branches" is reached.

At that time, and in the same way as in the case of viewing an article without "tree", the customer satisfaction questionnaire is displayed (including the extended form as described above).

Again, if the visitor fills the form, and the Backoffice has been configured properly, if “How we solved your query” button has been set to “No”, the extended form will be appearing, asking for additional information on why the article was able to solve visitor question, as indicated in previous sections.



The image above shows a quiz presented at the end of the review of a “fake” article in training mode. You can see questions and associated answers. To proceed you will have to select an answer for each question. If you succeed in your response (correct answers over pass rate defined in back office), you will return to the main screen of training mode, and the article will be marked as reviewed and training complete.

If you fail then, if additional questionnaires have been defined, next one will be offered to you, and you will have to fill the answers. This process will continue until you succeed. If you are not able to pass any of the presented questionnaires, the standard exit form will be presented and you will be able to continue, but the article will not be marked as training passed, and it will remain on your list of pending articles.

As a final remark, if you pass an article between the span window dates, it will be marked as “on time” otherrwise it will be marked as “late”.

How to create the first department

When the system is deployed, no organization is created, so it is highly recommended to create your own company organization to assign users

Category

 # 1 How to create first ...

By default, INTRA system only has theadminuser created. Although that user has access to all the sections and processes of the tool, the work logic requires several users working simultaneously. Therefore, the step prior to the creation of new users is the creation of the Departments of the Client's organization that will have access to SHA.
When you access de Department Maintenance section for first time, you get this screen: the message "there are no Department activated" is shown. In this case, the error message is associated with the fact that no department has been created yet.

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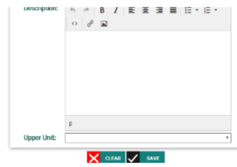
To create the first Department, click on the Add button.

Each department has three associated fields: name, description, an superior department if there is one.

As an example, we are going to introduce a department called Operations, with its description and in the the drop-down we will assign the option "Top Level", which means that it will not have any other department above.



Entering the data

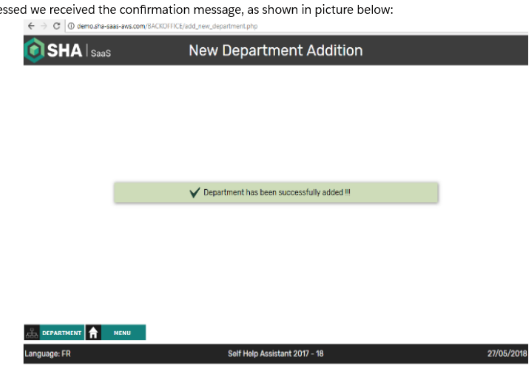
When entering the data, the application verifies that we include at least the name and description. Otherwise, pressing the **Save** button will get an error message, as shown on the right picture.

The application tells us that some data was wrong, so nothing has been recorded in the database.

Pressing the **Back** button returns to the previous screen and we can complete the necessary information for the correct registration of the Department.

And what is next?

When correct data is processed we received the confirmation message, as shown in picture below:



Do you want to continue?

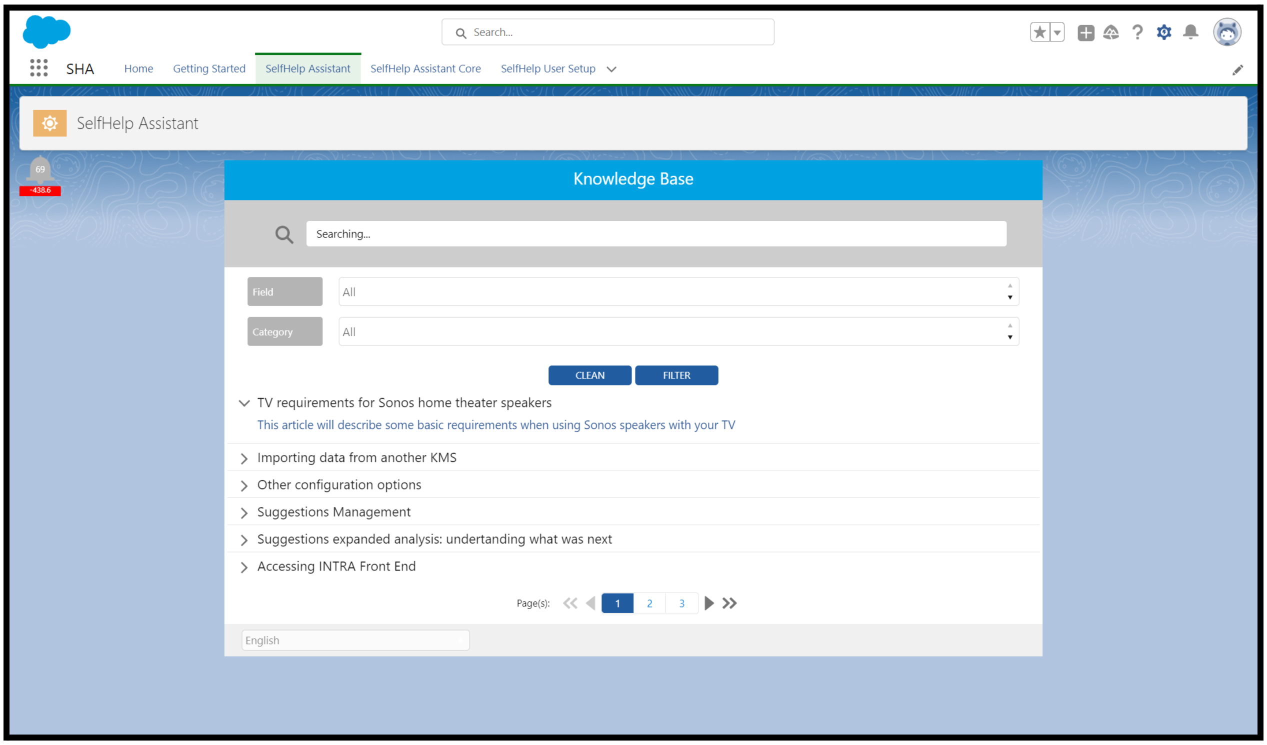
No, thanks

PREVIOUS NEXT

MAIN

Training Mode

If a visitor has any article assigned to training, a bell will be shown at the top left area of the screen, indicating both the number of training articles pending, and longest waiting time for article review. By clicking on that bell, INTRA will enter on training mode, where all the pending articles will be presented.



Search and filter boxes work exactly in the same way as normal operation. Fr training purposes the system will control the time a visitor spends on reviewing an article establishing a minimum time: user will not be able to proceed forward until that time is reached.

The only difference between normal and training mode appears when an article has exit quizzes assigned.

Back Office

There is a separate detailed user guide for SHA INTRA back office, please review the PDF title “SelfHelp INTRA Backend User Manual r.1.9. May 2023"