Portal Prodigy™
Ask the Expert Feature in Detail

Chapter Excerpt from Software User & Administration Guide
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www.portalprodigy.com

1.1 Introduction

This chapter describes the Ask the Expert feature component in detail. Using this feature, permitted users can submit questions to experts in specific areas of Expertise (Expertise Topics). Upon submission of the user's question, The Ask the Expert feature automatically emails the question along with contact information to each Expert matching the Expertise Topics that were selected by the user. Experts can then respond directly to the user.

Benefits of the Ask the Expert feature include:

- Provides value added service to customers, members, and/or constituents.

- No cost to your organization to provide the service.

- Supplement to Help Desk and Support system.

- Source of leads for authorized experts.

- Optional revenue source.

- Self administering.

1.2 The Visitor Experience

Visitors use the following page to submit questions to experts.

The visitor is then contacted directly by experts. Depending on the contact information provided, experts may contact the user by email, postal mail, or phone.

Experts use the Membership Signup process to register as an expert and to select relevant Expertise Topics that they wish to receive questions regarding. Depending on the membership configuration, experts may charged to be listed as an Experts or this may be offered for free.

Experts receive questions from users by email. The expert may choose how to contact the user depending on the contact information provided.
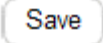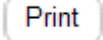
1.3 Components

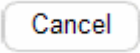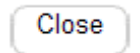The following components are used to configure and manage the Ask the Expert feature.

1.3.1   Ask the Expert Features Management page:

- Page Title – used to define the page title for the Ask The Experts feature page.

- Instructions – used to define instructions that are displayed below the page title on the Ask the Experts page. The ▣ HTML Editor option can be used to create and edit the instructions.

- Expert Signup Instructions – used to define instructions that are displayed below the page title on the Expert Signup page. The ▣ HTML Editor option can be used to create and edit the instructions.

- Experts Security Group – used to select the Security Group that Experts shall belong to.

- Broadcast Template – used to select a broadcast template used to format the email sent to experts.

- CC Admin Email – enter the email of an administrator to receive a copy of the email sent to expert.

- Question Limit – used to limit the total number of questions that a member can submit.

- Manage – [Expertise Topics Management](#) link displays the Expertise Topics Management page.

Save	Saves the Ask the Expert Features Management settings entered on this page.
Print	Print the current page (contents of your browser window)

	according to your browser's print settings.
Cancel	Close the page discarding all entries and edits.
Close	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.3.2   Expertise Topics Management page:

Expertise Topics Management

Business Process Engineering
Database
Internet Legal Issues
Networking
Retail use of Portal Prodigy
Software Design
Web Graphics Design
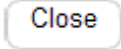
Add New Item

- Add New Item – used to create a new Expertise Topic.

Details section:

Details	
Description:	
Active:	Yes

Save   Print   Cancel   Close

- Description – used to enter the name of the Topic.

- Active – defaults to *Yes*, set to *No* to deactivate the topic. When a topic is deactivated it will no longer be offers as a choice on the Ask the Expert page.

Save	Saves the Expertise Topic.
Print	Print the current page (contents of your browser window) according to your browser's print settings.
Cancel	Close the page discarding all entries and edits.

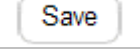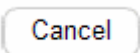|	
Close	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.4 Feature Administration

Using Ask The Expert Features Management, permitted Administrators can enable/disable and configure the PortalProdigy Ask the Expert feature component. Other than the initial configuration, the Ask The Expert feature is self administering.

The following need to be configured before Ask the Expert can be used:

- Create an email broadcast template for formatting emails sent to Experts.

- Enable and configure Ask the Experts Feature Management options.

- Create Expertise Topics using Expertise Topics Management.

- Create a link to Ask the Expert. Typically this is done using either Menu Builder or Mini Browser Builder.

- Create a Membership Type for Experts.

- Create a link to the Expert Membership Type. Typically this is done using either Menu Builder or Mini Browser Builder.

1.5 Tutorials

The following tutorials explain how to configure and use the Ask the Expert feature.

1.5.1 Configure Ask the Expert Feature

Setup an Ask the Expert Interaction Forum

1. Read the chapter in the Administrative Manual titled "Ask the Expert Features in Detail"

2. Go to Site Administration Menu.

3. Click on the Broadcasting Add icon located in the Contact Management section.

4. The following steps will guide you through process to create a template that will be used to send an email to applicable experts, upon submission of a user's question.

     a. Set Type to "Email".

     b. Enter a valid email address for your organization.

     c. Enter a Subject, e.g. "Portal Prodigy Ask the Expert Question"

     d. Set Body Format to "TXT".

     e. Set Object Type to "AskTheExpert".

     f. Create the Message. It should contain:

- A <%ASKTHEEXPERT:Question%> tag to insert the question;

- Tags to insert the contact information for the user asking the question;

- Any other instructions deemed applicable;

Example of an Ask the Expert template Message:

Dear <%ASKTHEEXPERT:ExpertFirstName%>,

The following request has been received:

<%ASKTHEEXPERT:Question%>

Please reply by email to the following person:

<%CONTACT:Prefix%> <%CONTACT:FirstName%> <%CONTACT:LastName%>
<%CONTACT:Title%>
<%CONTACT:CompanyName%>
Office email: <%CONTACT:CompanyEmail%>
Home email: <%CONTACT:HomeEmail%>

For assistance please contact us by email at support@portalprodigy.com or by phone 949.595.8300

5. Click the Close button and confirm save.

6. Go to Site Administration Menu.

7. Click on the Features Go To icon, located in the Site Management section, to go to the Features Management page.

8. On the Features Management page, enable Ask the Export by checking the checkbox that is next to it, then click the Save button.

9. Click on Ask the Expert link to go to the Product & Inventory Features Management page.

10. The Ask the Expert Features Management page is used to configure universal options and settings for the Product and Inventory feature.

11. Enter a page title to be displayed on the Ask the Expert page and the Ask the Expert Signup page.

12. Enter instructions to be displayed below the page title on the Ask the Expert page.

13. Enter instructions to be displayed below the page title on the Ask the Expert Signup page.

14. Select an Ask the Experts Security Group to be assigned to the expert when they signup using the Ask the Expert Signup page.

15. Select a Broadcast Template used to email the Ask the Expert questions to the expert.

16. If you want to cc (carbon copy) an administrator with email sent to Expert, then enter the administrator's email address.

17. Enter a number in Question Limit. For each user (contact) Portal Prodigy tracks the number of times they have used Ask the Expert. This field allows you to place a limit on the number of times a user can use Ask the Expert feature.

18. Click on the Expertise Topics Management link option to display the Expertise Topics Management page.

19. Repeat the following steps for each topic you want to create:

    a. Click Add New Item link option.

    b. Enter a topic title in the Description field.

    c. Click Save button.

20. When finished adding topics, click the Close button to return to Ask the Experts Features Management.

21. Click Close and if prompted, confirm to save.

22. Go to Site Administration Menu.

23. Click on the Membership Types Add icon located in the Content Management section. This will take you to the Membership Types Management page.

24. Create a Membership Type for Experts. See the tutorial titled "Define, Create and Update Membership Types". The following is required"

    a. Select "Expert" as a Contact Type Assignment.

25. Using Menu Builder, create one or more links to Ask the Expert and Ask the Expert Signup (Membership Type for Experts). See the tutorial titled "Build a Menu using Menu Builder".

26. You are finished.

1.5.2 Submitting Questions to Experts

Click on a link to access the Ask The Expert page.

Enter a question in the Question memo field.

Check each Expertise Topics pertaining to the question.

Click Submit button.