



CXP Platform Overview

Contents

Executive Summary	3
Creating a System of Engagement for Your CRM	4
CXP At a Glance	6
CXP Platform	7
For Ticketing and Case Management	10
For Knowledge Managers	11
For Community Managers	12
For Learning Manager	13
For Marketing	14
For IT	15
Deployment Options	18
Technology Overview	19
Wrap Up	20

Executive Summary

Your customers deserve a seamless, unified customer experience.

Traditional portal applications are often inflexible and do not deliver the modern web experience customers expect. Customer service applications are traditionally point solutions that may have a good user experience, but are delivered in a silo, without the breadth of information and services you need to support your customers.

Ingeniux Customer Experience Portal (CXP) delivers the best of both worlds: A modern portal with the content management and engagement capabilities to elevate your customer experience, and the enterprise security and integration endpoints to connect all of your applications and online services in a unified hub.

The Ingeniux CXP solution brings together service and support tools, knowledge and community in one place, enabling customer self-service and bringing you closer to your customers so you can deliver timely support and service.

We're ready to help you launch your Customer Experience Portal. Let's get started!

Creating a System of Engagement for Your CRM

The traditional approach to using CRM is as a system of record. CRMs have long been used by Sales and Marketing to store customer information, interactions with the company, what products they bought and where they are in the buyer's journey.

As customers become more empowered they have greater expectations. There is a great opportunity for the CRM to play a major role in digital customer experience considering the amount of information they maintain about the customer.

The screenshot displays the IGX CRM user interface. At the top, the logo "IGX YOUR WORLD, CONNECTED." is on the left, and "Submit Case" and "My Profile" buttons are on the right. Below the header is a navigation bar with links for "IGX Support", "Training", "Products", "Knowledge Base", "Support Cases", and a "Search" icon. The main content area features a "Welcome Back" message and four dashboard cards: "Support Cases" (5 OPEN SUPPORT CASES), "Products" (105 PRODUCTS), "Knowledge Base" (27 SAVED ARTICLES), and "Training" (3 CERTIFICATES). A notification bar indicates "You have 6 notifications". Below this is a search bar. The section titled "Open Support Cases" shows a list of support cases that are currently open.

Reference	Title	Date Opened	Submitted by	Status
0034897	Testing with type, product, and urgency	11/8/2016	Thomas Jeffery	New
0034896	Support blog down	9/6/2016	Anita Wallace	Research
0034895	Search on mobile	9/6/2016	Thomas Jeffery	New
0034893	Downloads not working on blog	9/6/2016	Michael Dash	New
0034892	Initialization error in version 9	8/29/2016	Brett Lindon	Escalated to 360 Support

[View All](#)

Today, CRMs are being used as systems of engagement, providing not only critical information about customers, but also driving the interactions used by Sales and Marketing activities. To work as a system of engagement, the CRM needs to integrate with other systems across the organization that support customer experience, including marketing automation, e-commerce, billing, ERPs, and other service and support systems.

These integrations provide a single view of the customer and enable the CRM to analyze customer data across the entire customer lifecycle, providing key insights and recommending actions that enable a seamless customer experience across the entire customer lifecycle.









CXP takes your CRM from a simple system of record to a system of engagement.

Ingeniux mirrors your back office CRM. It syncs to accounts and contacts in your CRM and adds additional metadata that enables improved customer service management across a number of service and support activities. Ingeniux also provides privacy capabilities that enable

customers to indicate how they want to interact, and supports a range of engagement tools for communities and gamification around the customer profile.



CXP At a Glance

 <p>For Ticketing/ Case Managers:</p> <p>Provide your users with ticketing and support in one place.</p>	 <p>For Customer Service Managers:</p> <p>View at-a-glance all service and support information for the customer.</p>	 <p>For Knowledge Managers:</p> <p>Share information critical to customer self-service in an easy to search experience.</p>
 <p>For Community Managers:</p> <p>Empower customers to share insights and experiences on your products and services.</p>	 <p>For Learning Managers:</p> <p>Provide access to learning programs required to use products and services.</p>	 <p>For Marketing/ Sales:</p> <p>Present in context cross sell and upsell opportunities to engaged customers.</p>
 <p>For IT:</p> <p>Provision users, ensure security and governance of information and systems for both web and mobile access.</p>	 <p>For Developers:</p> <p>Develop and extend using open APIs and the latest Microsoft technologies.</p>	

CXP Platform

Ingeniux CXP is an enterprise customer portal solution. It enables you to bring together information and support services from your existing applications into a centralized website, giving both you and your customer a 360 degree view of the customer's service and support requirements.

The Ingeniux CXP platform has five core components:

Profile Management	Content Management	Membership & Community	Enterprise Search	3rd Party Integration
--------------------	--------------------	------------------------	-------------------	-----------------------

Customer Profile Management

The customer profile is the most important component of the Ingeniux CXP. The profile is stored in the Ingeniux CXP database and connected to your CRM and other integrated applications. The database is seeded with CRM data, but includes custom fields for profile information not stored within your CRM. This additional metadata enables you to customize the CXP experience for each customer.

The customer can update his/her profile within CXP, and these updates are synchronized in real-time to the CRM.

Digital Content Management

Ingeniux CXP offers integrated digital content management that enables you to create and manage new content, import content from existing repositories and bring it all together in a cohesive customer portal experience. CXP leverages a complete suite of content management tools including taxonomy, versioning, workflow and approvals, digital asset management and publishing.

CXP also provides the ability to quickly design and publish portal web pages using Page Builder. Page Builder is a visual web page and template designer you use to create your portal experience without

coding. Page Builder supports Bootstrap and other responsive frameworks ensuring your portal experience is mobile and tablet friendly.

Using Page Builder, individual modules of CXP such as support case listings, available learning courses, new knowledge objects and other special components can be moved around within the layout of the CMS template and then published to the site underlying the CXP portal. Page Builder allows you to add, remove, and reorganize these widgets on a CXP page.

Membership and Community Capabilities

With Ingeniux CXP you can include collaborative and community capabilities to empower your customers to help and learn from each other. Interest groups, blogs, forums, activity feeds, social feedback and other capabilities let your customer interact the way they want.

Enterprise Search

Ingeniux CXP provides built-in search capabilities for federated indexing and searching of content and information across multiple locations. Set up faceted and guided search, integrate taxonomy, apply stemming, keywords and results weighting, and security and content filtering based on access rights.

Use CXP search to provide recommended content indexes, related links and other search-based content indexes on your CXP web pages.

Leverage search analytics to help you understand what customers are looking for to help you improve the experience and ensure the most important information is easily accessible.

Third-Party Application Integration

Using Ingeniux CXP's open APIs, integrate a wide range of service and support applications including CRM for ticketing and knowledge-base, marketing automation, chat, learning management and others.

Take advantage of integration capabilities for Salesforce and Dynamics CRM, Marketo and Pardo, and a number of Learning Management Systems (LMS).

To create a seamless experience for customer support, end-user SSO is important. Implementation of SSO will differ based on the applications integrated and specific customer requirements. Ingeniux CXP can support more than one Identity Provider at the same time, making it easier to create a seamless secure experience.

For Ticketing and Case Management

Integrate CXP with your Salesforce ticketing system and provide an area for customers to create, update and review ticket requests.

Integration is done using the the ticketing system APIs. Ticketing information is synchronized in real-time.

You can include modules that provide links to CRM support information. These knowledge base articles will open in the CXP directly.

Customer support employees can use the CXP portal to see a customer's existing tickets and associated information.

The screenshot displays the IGX Support Cases portal. At the top, the IGX logo is followed by the tagline "YOUR WORLD, CONNECTED.". Navigation links include "IGX Support", "Training", "Products", "Knowledge Base", "Support Cases", and a search bar. User options for "Submit Case" and "My Profile" are in the top right. The main header shows "Support Cases" and the user name "Ashley Christensen".

The main content area features a case titled "Pages missing body content on DSS site when viewed in Internet Explorer". The case details are as follows:

Status: In Progress	
REFERENCE: 00034897	SUBMITTED ON: 11/7/2016 at 6:02 PM
TYPE: Support	SUBMITTED BY: Anita Wallace
URGENCY: Medium	LAST UPDATED: 11/7/2016 at 6:02 PM
PRODUCT: Product 1	
ATTACHMENTS(S): dss-ie.jpg	

Below the case details are buttons for "Add Notes" and "Close Case". A rich text editor with formatting tools (B, I, link, unlink, help) is provided for notes. At the bottom of the editor are buttons for "Add files", "Cancel", and "Save Notes".

On the right side, there is an "Abstract" section with the following information:

- VERSION: V8.0, V9.0, V9.5
- COMMENTS: [4 comments](#)

For Knowledge Managers

Organizations maintain a vast array of information from knowledge based articles in a CRM or other system, to product documentation, help files, PDFs, and more.

Knowledge may be located in a Component Content Management system (CCMS) that uses DITA, on a file share or in a SQL database.

Ingeniux CXP provides the ability to integrate all these silos of information that are critical to support customer self-service and bring the content into the portal.

You can set up an area of the CXP to display the Knowledge base, which can be a single external source, or a combination of a number of sources. Enable search across

IGX YOUR WORLD, CONNECTED.

Submit Case My Profile

IGX Support Training Products Knowledge Base Support Cases Search

Knowledge Base Anita Wallace

TROUBLESHOOTING
How to enable SSL/HTTPS for a DSS 9.0 Site
This article describes how to configure SSL/HTTPS for a DSS 9.0 website. Configuring SSL is an optional step; however, we recommend SSL for production environments.
View Article

Article Index

All Articles My Library

Type Category Product Search

Your Selections: Selection ✕

TROUBLESHOOTING
CMS 9.0: Initialization Error Prevents CMS Login
The following error message appears: "Too many initialization errors, [number] attempts.
Reason: "System.Aggregate: One or more errors occurred."
Date: April 14, 2017
Product: CMS
Comments: 2 comments
Rating: ★★★★★ Rate this
Remove from My Library

the full knowledge repository or only certain areas to help customers quickly filter the information and find what they want.

Provide relevant links to knowledge base content in your ticketing and service areas, and include knowledge base content in your community and general CXP searches.

You can also create and manage your knowledge base and other content directly within Ingeniux CXP enjoying all the capabilities of a content management system such as structured content, authoring, workflow and multilingual capabilities.

For Community Managers

Community is an important element of a Customer Experience Portal. It allows customers to share insights and personal experiences on the company's products and services and ask questions from people who actually use the products.

Ingeniux CXP provides a range of community capabilities from blogs and forums, to activity feeds, social feedback (commenting, likes, ratings, etc) and interest groups. Community managers can also set

up gamification to encourage engagement through things like leader boards, badges, and games.


Community features are proven to lower support costs and improve customer loyalty and retention. They can also support cross-selling and upselling opportunities. You will need to identify one or more community managers and look at your customer community as a key element of your advocacy program.

For Learning Manager


Learning management is an important aspect of customer service. From technology vendors to financial institutions, self-service learning is often provided to customers to support their understanding and use of products. Integrating the learning management platform with CXP gives customers one place to access all the tools they need to successfully use a product or service.

Integration can happen in a few ways. It can be tightly integrated via SSO, offering a seamless integration to the LMS from CXP. This could be as simple as a link.

CXP can also provide web pages that list courses required and available, provide links to current courses underway and connect customers with other course takes through community forums. All links take

[Submit Case](#)[My Profile](#)

[IGX Support](#)[Training](#)[Products](#)[Knowledge Base](#)[Support Cases](#)[Search](#)


 **Training** Anita Wallace

[Self-Paced E-Learning](#)[Instructor-Led Training](#)[Webinars](#)

Instructor-Led Training

Ingeniux CMS Fundamentals

This course lays the foundation for working in Ingeniux CMS. Gain the knowledge you need to perform essential tasks like accessing author and admin clients, creating and editing pages, and managing workflow.



Ingeniux CMS Fundamentals

DATE: May 1-5, 2017
LOCATION: Ingeniux HQ, Seattle, WA
PRICING: Single Course Price: \$750

[Register Now](#)

Who Should Attend

- Project Managers
- Site Administrators
- Web Developers
- Anyone else working within the CMS

Class Details

PRODUCT
CMD

TRACK
Developer

TYPE
Instructor Lead

DURATION
1 hour 33 mins

Related Classes

[Ingeniux CMS Implementation Best Practices](#)

[Ingeniux CMS Site Configuration](#)

the customer into the LMS system directly for actual courses. The LMS can be branded to match the CXP experience, but it is not necessary.

Out of the box, Ingeniux CXP integrates with Cornerstone and Absorb. Additional LMS platforms are integrated using the APIs of that specific platform.

For Marketing

Marketing continues to play a critical role in the customer's experience long after acquisition. This role extends to the Customer Experience Portal in a few different ways.

Marketing can provide upsell and cross-selling opportunities within CXP by analyzing the customer service data, analyzing knowledge base traffic and examining search queries.

The results of this analysis enable marketers to provide personalized targeted offers within CXP directly, such as a banner ad, notification of new products or links to customer stories and other information that help the customer find additional

information or products that meet their specific needs.

Integration with marketing automation platforms such as Marketo and Pardot enable marketers to provide more relevant email newsletters to existing customers.

Another way that marketing can leverage CXP is by engaging with customers and growing customer advocacy programs.

Customers are often the best influencers for new customers and for upsell/cross sell opportunities. Marketing could develop an advocacy program that includes the community tools of CXP.

For IT

High Availability and Performance

Ingeniux CXP is a highly available platform. High availability is delivered through the use of dynamic load balancing and clustering as well as caching within the service bus for delegated calls to external systems (CRM, LMS, SSO system).

Scaling out requires adding more servers into the cluster. The lack of additional enterprise database dependencies for the core platform (Ingeniux CMS leverages a NoSQL database for content management), reduces IT configuration management overhead.

Security and SSO

End user SSO is done a number of ways depending on the platform integrations and requirements. The most common form is to use SAML 2.0 and any number of Identity Providers (IDP) – such as Okta, Ping, Salesforce, or Azure AD. When using an external IDP, Ingeniux delegates credential management to the external system.

The Ingeniux CXP platform can also act as an IDP and provide SAML SSO services to other systems and applications. In this case acting as IDP, Ingeniux manages the user credential and account management features.

The CXP platform can also use OAuth instead of SAML for other types of federated login.

A key differentiator for Ingeniux CXP is that it can support more than one Identity Provider at the same time, whereas most Portal solutions only support a single IDP.

User Provisioning & Delegation

There are four approaches for user management:

1. Bulk account data loading
2. Time-based synchronization of account data from the core system (CRM, Directory)
3. Just in time provisioning
4. Local registration

The first two approaches focus on mass creation of accounts. Just in time provisioning enables the CXP to create an account for a user who can authenticate to a valid IDP system at the time of first login. The CXP creates the account using their IDP metadata (username, email, first, last, group, etc.).

Local registration allows the CXP to create a record for the user and also optionally link them to a source IDP system or CRM system.

On going user provisioning in CXP can be completed by the organization's account managers, who can manually set up and manage accounts for each customer's company. Or the customer company can have direct access to personally set up the employees they want to participate in the support portal.

Each users can belong to one or more CXP group – which can correspond to accounts from a CRM or other IDP system. Each account can identify users who can manage Groups/Accounts and control membership and other settings for that group within CXP.

Understanding Environments

Ingeniux CXP is designed to support multiple development, staging, and production environments.

Publishing and Synchronization

Ingeniux CXP supports delivery of content to multiple formats and replication of content to multiple locations. In deploying, Ingeniux CXP supports “early binding” static HTML and other file types, as well as “late binding” dynamic deployment using the Ingeniux ASP.NET Dynamic Site Server.

Ingeniux CXP replicates content to multiple locations for website and content deployment using built-in syncing and replication. Automatically deploy web content, code, assets and templates from development through production. Ingeniux supports multiple replication options, including secure FTP, WAN-LAN, and File Share. Replication is based on the Microsoft Sync Framework and is bi-directional.

Multi Environment Support

Ingeniux is designed to manage an unlimited number of websites and to control the content reuse, staging, security, and delivery between them. With Ingeniux CXP, you can define separate environments for your production website, staging and test environments.

Mobile Capabilities

The Ingeniux Dynamic Site Server (DSS) is a device aware-application that detects the user agent and device for each content request. Ingeniux CXP can target and render content based on device types and capabilities.

Ingeniux packages a device profile library of over 20,000 mobile devices that is automatically updated weekly with new specifications. Use the library for loading emulations and real-time device and capabilities detection for intelligent content display.

Governance

Ingeniux has a robust governance model, including security and permissions for users, groups, and content assets, along with web page creation rules.

Users, Groups, and Roles: Cascading Authentication authenticates a user into the CXP. Supporting single sign-on integration with Active Directory, LDAP, the CXP users system, and a host of custom providers, Cascading Authentication enables organizations to utilize multiple identity providers to manage access and group-level security in the CXP.

Content Level Permissions: Apply access rights to any content item in the application. Within the CXP, content may be full access, read only, or hidden. Component and element level permissions may also be applied to secure portions of a web page. External access rights can be applied to content that requires log-in or authentication on the live website.

Deployment Options

Ingeniux CXP is architected from the ground up for cloud delivery.

Ingeniux Managed Cloud / SaaS

Ingeniux CXP software-as-a-service and cloud services provide customers with a fully deployed and managed web presence and application environment. The CXP application and website are hosted in the Ingeniux cloud using virtual servers over an extensive grid of computers. The deployment tier supports CDN and auto-scaling with fast file-based delivery and edge caching.

Ingeniux goes beyond traditional multitenant SaaS solutions by providing each customer with a dedicated environment for its Ingeniux CXP application. Using this approach, each customer can define the network configuration needed to meet business, security, and compliance requirements.

The Ingeniux approach also provides greater flexibility: upgrade when you want, manage file-level access, write

customizations and integrations, install additional applications or databases.

The cloud provides greater scalability, less management overhead for IT teams, and the peace of mind of having one number to call to address your web software, performance, and uptime services.

Public Cloud / PaaS

Ingeniux provides managed hosting solutions that enable businesses of all sizes to accelerate growth and scale operations while controlling costs and reducing IT infrastructure support risks. Our industry-leading software-as-a-service goes beyond traditional hosting by providing application management, change management, performance management, and application optimization. On-premise deployment is available with a perpetual license to the software and an unlimited support and maintenance program.

Technology Overview

The CXP platform is a loosely coupled three-tiered architecture that brings together web content management, search, community and portal technology in a single environment. It consists of five main components:

1. The Ingeniux Web CMS manages portal content and design.
2. A deployment platform delivers the portal web experience, including search.
3. A member data platform stores user and account level information from the CRM, as well as provides SSO support. The data platform also provides community features.
4. A set of open APIs for content and presentation development and content delivery. These APIs can integrate content and related application data from third-party systems.
5. Fully integrated search, including federation, faceted and guided search. The search component runs on the Deployment Platform to display search results and uses the member data platform to personalize or save searches.

Ingeniux CXP is built using the latest Microsoft technology including ASP.NET 4.5 and MVC 5.0.

Wrap Up

An Ingeniux Customer Experience Portal (CXP) is the ideal customer support solution. You know your users better than anyone; with Ingeniux CXP, you have the freedom to design the customer experience the way that makes the most sense for them.

With Ingeniux CXP, you also have the power to easily integrate all your support and other third-party tools and services, like ticketing, knowledge base, and learning management systems. Foster a sense of community among your user base and nurture customer advocacy with both built-in and custom community features.

Ingeniux CXP supports integration with marketing automation so you can stay involved throughout the entire customer lifecycle, helping you identify cross-sell and upsell opportunities where and when they make the most sense.

We encourage you to connect with us to learn more about how Ingeniux CXP can help you bring together disjointed support and services into a unified customer support experience.

Connect with us today.

☎ 877 445 8228
✉ Info@ingeniux.com
🌐 www.ingeniux.com

About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent “structured” content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on-premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at <http://www.ingeniux.com>.

INGENIUX

PO Box 21466
Seattle, WA 98111

info@ingeniux.com
877 445 8228