



QUEPLIX QUESEARCH: ENABLING UNIVERSAL ENTERPRISE SEARCH

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Queplix Universal Search Product QueSearch allows secure searching of both **Structured** (documents) and **Unstructured** (applications) Enterprise Content from a simple user interface.

QueSearch extracts user roles and permissions dynamically from the enterprise applications and allows users to see only the information they are allowed to see.

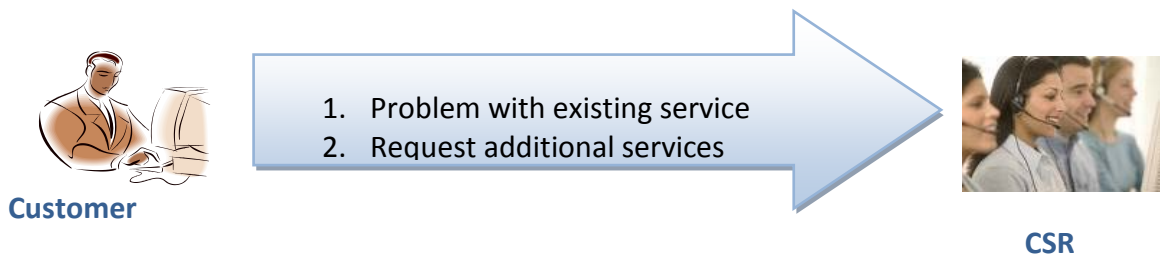
During the automated crawling process QueSearch extracts business entities, user accounts and roles from individual applications and, if available, LDAP. QueSearch will then "globalize" or merge business entities, users and permissions in order to prepare a complete and secure index for the search.

Unlike any other enterprise search solution, QueSearch will enable real-time ranking of the information, while applying enterprise related criteria to the search weighting, i.e.: number of database objects external keys, transactional history and other factors unique to your enterprise and business operations. Combined with the any standard search, Queplix QueSearch allows instant 360-degree view of any permitted business object and even navigation to any part of the allowed workflows within indexed applications.

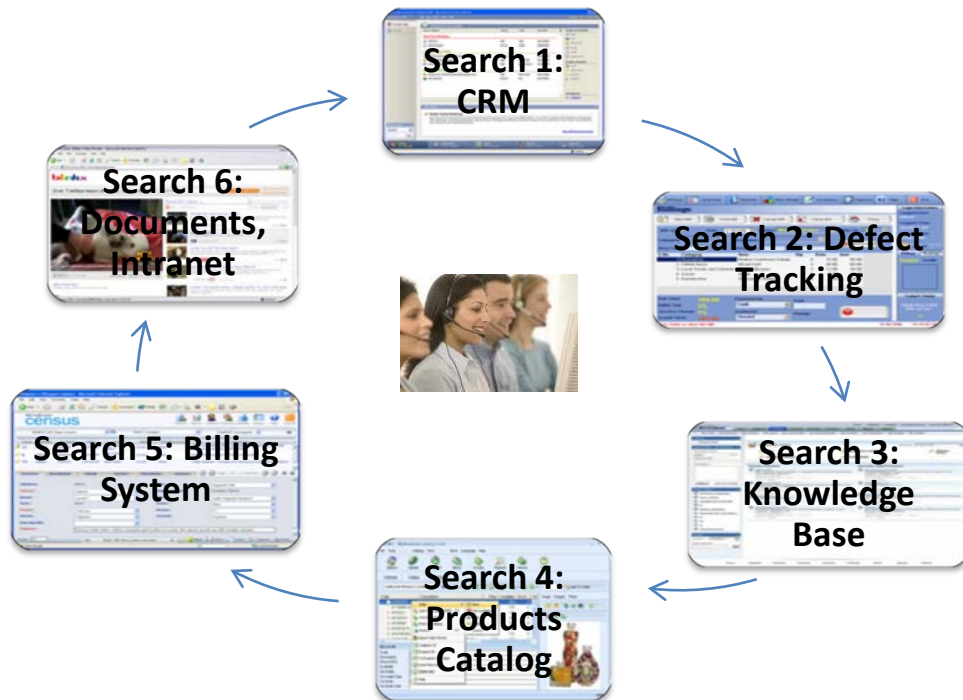
QueSearch can be deployed as a plug and play appliance or installed on internal servers as well as it can be deployed in Private or Hybrid Clouds. There is no customization required in order to enable Universal search across your on-premises applications such as Siebel, SAP, Oracle and Cloud applications such as Google Apps or SalesForce.com, or in-house created applications as well as over 200 document formats. QueSearch eliminates the need to integrate many enterprise applications, since it will allow search to display federated results from all crawled applications in real time. From the search results page you can navigate directly to the application containing the record (QueSearch can login into the source application using your LDAP account) or initiate actions applicable to your role and displayed based on your usage patterns of the target application: i.e. create new PO, start a new Ticket Request, etc.

In this document, several use cases are described, demonstrating how enterprise employees would accomplish a task, first without using QueSearch and then with QueSearch.

USE CASE 1. CUSTOMER SERVICE REP RECEIVES A CUSTOMER INQUIRY



PROCESS WITHOUT QUESEARCH



The CSR of an Internet Service company receives a call from a customer. Customer has three issues:

1. Complain about service
2. Request for new service
3. Question on the bill

The approved workflow in this case would be:

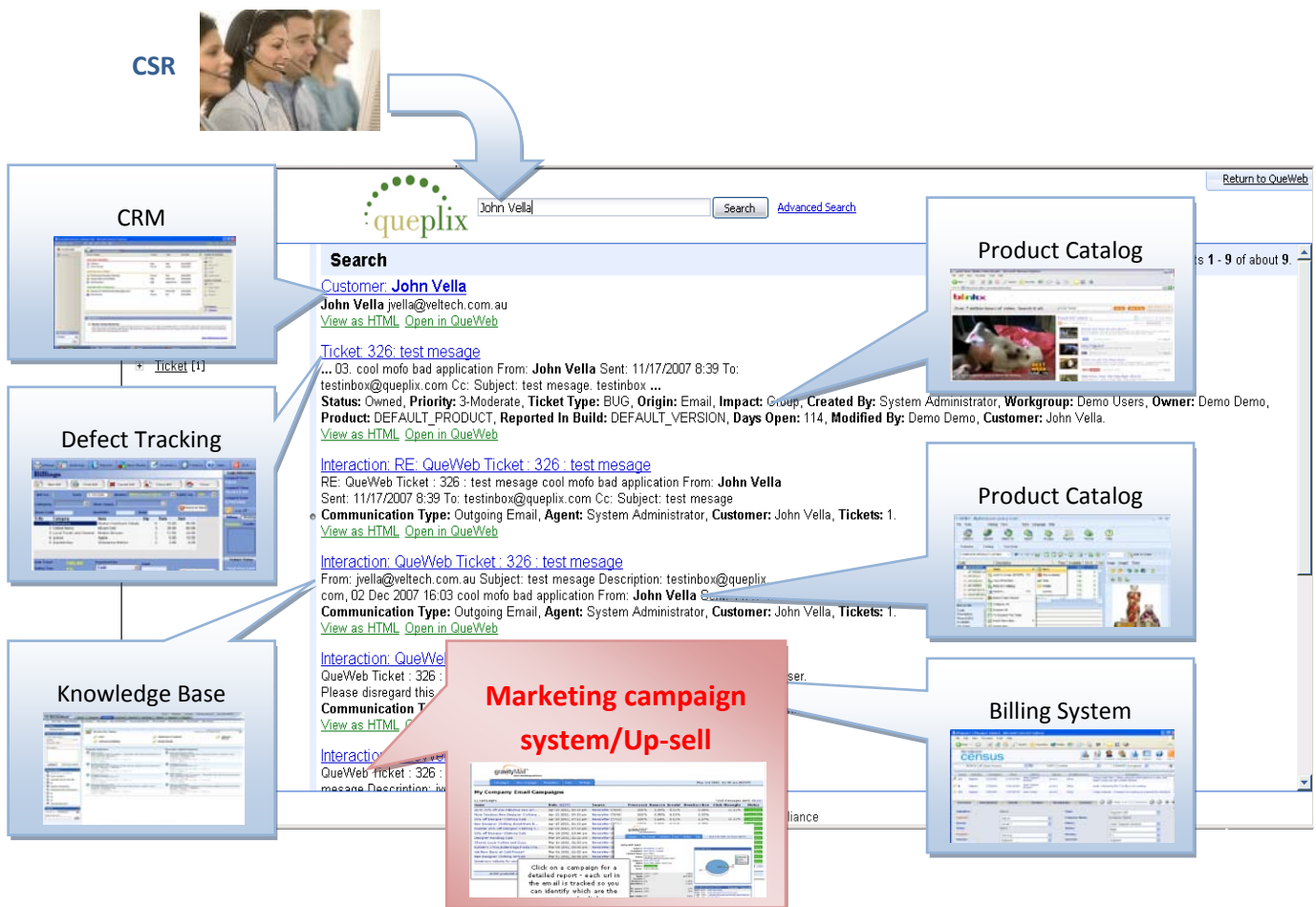
1. Open CRM
2. Search for Customer in CRM
3. Create a Issue/Case in CRM
4. Open Knowledge Base
5. Search Knowledge Base for known issues
6. Try to find a quick solution
7. If solution cannot be easily found – escalate to 2nd level of Support using CRM
8. Open Defect Tracking
9. Search for known defects of similar nature

10. Open Products Catalog
11. Search for Service/Products/Pricing
12. Provide quote for new Service
13. Open Billing
14. Search for Customer
15. Try to reconcile billing
16. If billing cannot be reconciled - open another Case in a different (Internal) CRM
17. Open email and try to search emails, documents or other files containing information related to Customer, Product, Service or similar issues (perhaps using Enterprise Search Engine)

The Workflow process described above would take anywhere from 30 minutes to over one hour. It would also take several interactions between departments and roles, as well as cause a lot of customer aggravation.

Search within each step is very rudimentary, unintuitive and relies too much on competency of the individual CSR to find relevant information within each "Information Silo". Not only is this a very inefficient use of employee's time, but also presents lost opportunity, since many Up-selling/Cross-selling opportunities will be overlooked. Customer's goodwill will be damaged.

PROCESS WITH QUESEARCH



The workflow in this case would be:

1. Type Customer Name in QueSearch

Globalized results from several apps would appear on a single screen. CSR would be able to identify:

- Eligibility for support
- Last inquiry status
- Sales pipeline
- Number of recent interactions.
- Up-sell/Cross-sell opportunities
- Defects related to products/services customer has purchased
- Billing Issues related to customer or any irregularities /errors in billing across portion of customers

2. In the same QueSearch screen the CSR types in Customer's question

CSR instantly receives links to relevant KB articles, and the information about the new product feature owned by the Customer including the required part available inventory. While asking the customer if he is interested in the new feature, she clicks a QueSearch Action next to the part number and she is transferred and automatically logged in to CC application where she completes her task. The time spent searching for customer information is 3-5 minutes. Time spent login in and navigating through various applications just to get to relevant information: 0 minutes.

RESULT: By leveraging the QueSearch, the CSR was able to assist the customer faster and with more efficiency as well as identify an up-sell opportunity, which otherwise she would have missed. The CSR did not have to waste time accessing systems which were not required to resolve the issue at hand.

Not only does CSR save 45 minutes per customer interaction on average, but the effectiveness of each interaction is improved through generating more business, as well as improving return business ratio.

USE CASE 2. SALES REP RECEIVES A CALL FROM THE PROSPECT



Sales call results in Trouble Ticket



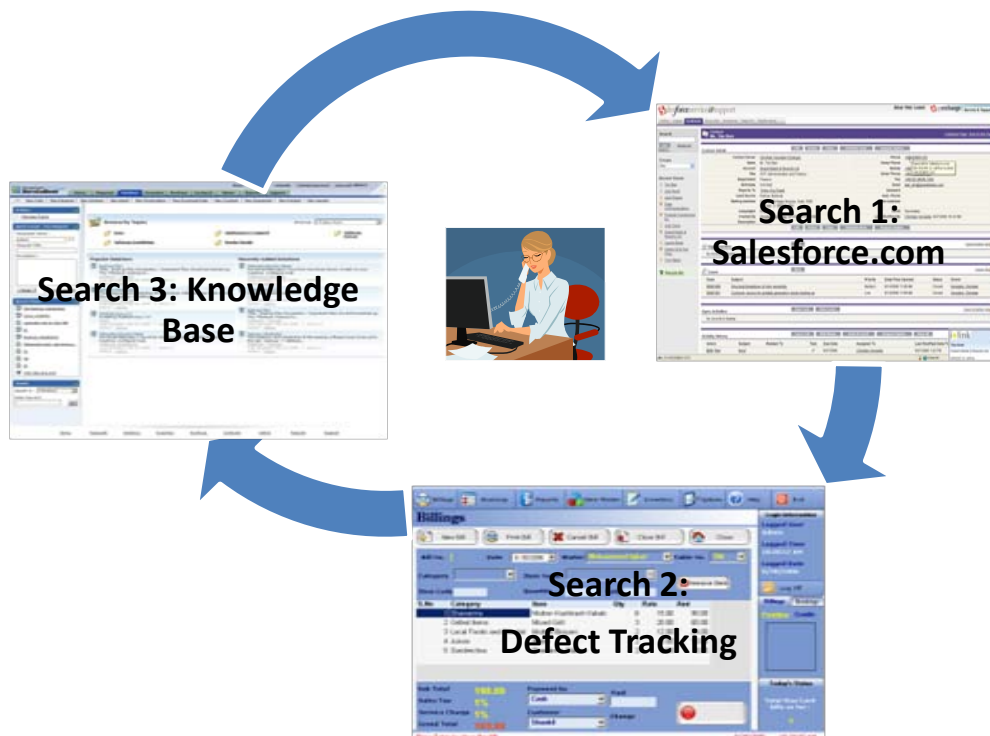
The Sales Rep from an Office Supply company calls a lead to introduce Printer Cartridge promotion deal. He reaches the customer on the phone and delivers a 30 second pitch introducing the deal. While he is on the phone, the customer expresses concerns that the Cartridges take a very long time to ship, don't seem to last as long as some of the competing products and cost approximately 5% more .

PROCESS WITHOUT QUESEARCH

Sales Rep navigates to the Salesforce.com app (SFA), logs in and searches for the customer, then opens the account and creates a new opportunity.

Sales Rep opens Knowledge Base to check for promotions or items that can help him address competitive issues raised by customer (maybe overnight shipping options or premium product offers).

Sales Rep gets a Customer Service rep on the phone who tried to access Defect Tracking system to address Customer issues.



PROCESS WITH QUESEARCH



The screenshot shows the QueSearch interface with a search bar containing 'John Vella'. The results are filtered by 'Customer [1]'. The search results include:

- Defect Tracking:** A callout box showing a screenshot of a defect tracking application.
- Salesforce.com:** A callout box showing a screenshot of the Salesforce.com interface.
- Survey Data:** A callout box showing a screenshot of survey data.

The search results text includes:

Customer: **John Vella**
John Vella | jvella@veltech.com.au
[View as HTML](#) [Open in QueWeb](#)

Interaction: **QueWeb Ticket : 326 : test message**
3. cool mofo bad application From: **John Vella** Sent: 11/17/2007 8:39 To: inbox@queplix.com Cc: Subject: test message: testinbox ...
Status: Owned, **Priority:** 3-Moderate, **Ticket Type:** BUG, **Origin:** Email, **Impact:** Group, **Created By:** System Administrator, **Workgroup:** Demo Users, **Owner:** Demo Demo, **Product:** DEFAULT_PRODUCT, **Reported In Build:** DEFAULT_VERSION, **Days Open:** 114, **Modified By:** Demo Demo, **Customer:** John Vella.
[View as HTML](#) [Open in QueWeb](#)

Interaction: **QueWeb Ticket : 326 : test message**
RE: QueWeb Ticket : 326 : test message cool mofo bad application From: **John Vella** Sent: 11/17/2007 8:39 To: testinbox@queplix.com Cc: Subject: test message
Communication Type: Outgoing Email, **Agent:** System Administrator, **Customer:** John Vella, ...
[View as HTML](#) [Open in QueWeb](#)

Interaction: **QueWeb Ticket : 326 : test message**
jvella@veltech.com.au Subject: test message Description: testinbox@queplix.com
Sent: 11/17/2007 16:03 cool mofo bad application From: **John Vella** Sent: 11/17 ...
Communication Type: Outgoing Email, **Agent:** System Administrator, **Customer:** John Vella, **Tickets:** 1.
[View as HTML](#) [Open in QueWeb](#)

Interaction: **QueWeb Ticket : 326 : test message**
QueWeb Ticket : 326 : test message Your Ticket has been Assigned to Demo, Demo User.
Please disregard this email as it was sent from the demo QueWeb system. ...
Communication Type: Outgoing Email, **Agent:** System Administrator, **Customer:** John Vella, **Tickets:** 1.
[View as HTML](#) [Open in QueWeb](#)

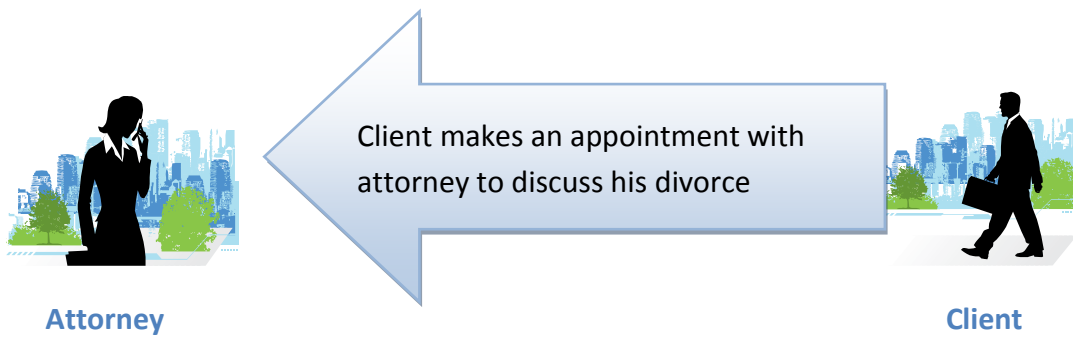
Interaction: **QueWeb Ticket : 326 : test message**
QueWeb Ticket : 326 : test message test From: jvella@veltech.com.au Subject: test message Description: jvella@veltech.com.au - 17 Nov 2007 13:45

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Sales rep opens QueSearch search and types in the Customer's name. He receives federated and globalized (by Customer's Account) search results from SFA, Bug Tracking apps and Survey data. He instantly knows that this company has an existing account, has several open issues they reported and survey complaints which QueSearch made visible due to ranking applicable to this Sales Rep. He assures the customer that all open issues are being worked on and provides the ETA available in the search results. Sales rep then clicks on the QueSearch Action "Create new opportunity" and proceeds to the SFA application to finish the task.

RESULT: By utilizing QueSearch, the Sales Rep was better prepared to anticipate the prospect's needs: he instantly reviewed all aspects of prospect's history which not only helped him close the sale, but improved customer's perception of Salesperson's competency, as well as overall Company's focus on a customer.

USE CASE 3. LAWYER HAS AN APPOINTMENT TO SEE A CLIENT



WITHOUT QUESEARCH



Secretary receives a call from a client. He wants to come in and discuss his divorce. Secretary opens a calendar to see what days/times an attorney is available. Secretary makes an appointment. A lawyer looks at the calendar sees an appointment with a client. A lawyer has to open conflict resolution software to see whether or not there are any conflicts of interest with other clients/cases. A lawyer finds that a client already has a case with a firm which poses no conflict resolution. A lawyer does not find any conflicts. A client comes in for consultation. Client spends an hour consulting an attorney and agrees to hire him. An attorney says that there will be \$3,000 retainer fee and an hourly charge of \$150. A client agrees. Lawyer starts working on the case after client leaves. Lawyer opens timesheet software and enters his hours spent on the client. Lawyer submits timesheets to the office administrator. While entering hours, Office administrator checks billing software and discovers that client has not paid the office for the last 6 months and has \$20,000 invoice outstanding. Lawyer also checks email communication and discovers that there is an email from client's wife asking the firm to represent her in the divorce.

The diagram illustrates the workflow of a law firm using QueSearch. At the top, an **Attorney** and a **Secretary** are shown with arrows pointing to a central search interface. The interface displays search results for **John Vella**. The results include:

- Search Results:** Customer: John Vella, John Vella (jvella@veltech.com.au), Ticket: 326 test message.
- Interaction 1:** RE: QueWeb Ticket : 326 : test message. From: John Vella, Sent: 11/17/2007 8:39 To: testinbox@quepplx.com. Status: Owned, Priority: 3-Moderate, Ticket Type: BUG, Origin: Email, Impact: Group, Created By: System Administrator, Workgroup: Demo Users, Owner: Demo Demo, Product: DEFAULT_PRODUCT, Reported In Build: DEFAULT_VERSION, Days Open: 114, Modified By: Demo Demo, Customer: John Vella.
- Interaction 2:** QueWeb Ticket : 326 : test message cool moto bad application. From: John Vella, Sent: 11/17/2007 8:39 To: testinbox@quepplx.com. Communication Type: Outgoing Email, Agent: System Administrator, Customer: John Vella, Tickets: 1.
- Interaction 3:** QueWeb Ticket : 326 : test message. From: jvella@veltech.com.au Subject: test message Description: testinbox@quepplx.com, 02 Dec 2007 16:03 cool moto bad application. From: John Vella Sent: 11/17 ... Communication Type: Outgoing Email, Agent: System Administrator, Customer: John Vella, Tickets: 1.
- Interaction 4:** QueWeb Ticket : 326 : test message. Your Ticket has been Assigned to Demo, Demo User. Please disregard this email as it was sent from the demo QueWeb system ... Communication Type: Outgoing Email, Agent: System Administrator, Customer: John Vella, Tickets: 1.
- Interaction 5:** QueWeb Ticket : 326 : test message test. From: jvella@veltech.com.au Subject: test message Description: jvella@veltech.com.au, 17 Nov 2007 13:45.

Callouts from the interface point to various software components:

- Calendar:** A calendar view showing appointments.
- Conflict Resolution:** A tool for tracking appointments, exchange decisions, and tasks with a central calendar.
- Time Sheets:** A tool for tracking time spent on various tasks.
- Billing System:** A tool for managing billing, showing a 'census' of bills.

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Secretary opens QueSearch search and types in Client's name. She receives federated and globalized search results from Conflict resolution software, Appointment Software and Billing software. She instantly knows that the client has unpaid bill for \$20,000, for existing case. She asks the client about it and tells him to bring a check for the appointment. Lawyer opens QueSearch search and types Client's name. He receives existing information about all cases the firm has with a client. He sees that there is unpaid bill of \$20,000, but also that client has paid \$250,000 to the firm and therefore decides to treat him as a high-end client. Lawyer also sees an email from client's wife asking him to represent her in the same divorce case. Lawyer enters client's wife's name in QueSearch and sees that the firm does not represent her in any other cases. Lawyer makes a decision to represent the existing client and sends an email to the wife telling her of a conflict. Lawyer also gets updates from other cases that the firm is working on to let the client know the status of them during the appointment.

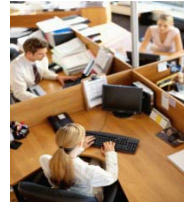
RESULT: By utilizing QueSearch, lawyer is able to drastically improve her efficiency and increase the number of potential billable hours. Law firms are very information-centric organizations, and by making information available quicker and more organized QueSearch improves their overall competitiveness.

USE CASE 4. ACCOUNTANT/AUDITOR

Auditor



Financial Audit

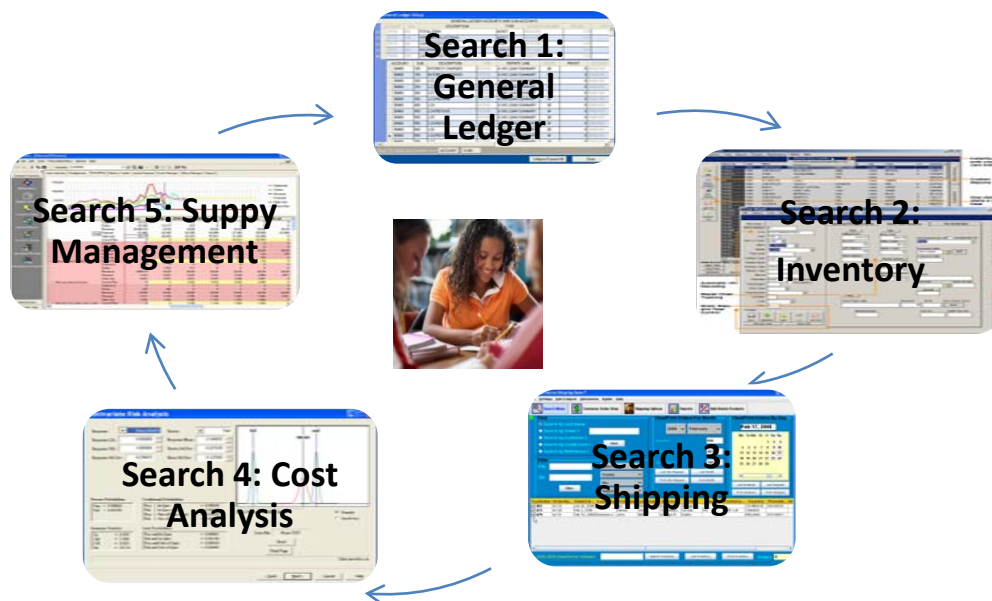


Large Retail Chain

There are many steps involved in auditing a company. An Auditor usually starts with a top level Financial Statement item and then works her way down to granular details. It involves many cross checks as well as physical counting and interviewing personnel, customers and suppliers.

Let's take example of a Large Retail Store Audit.

WITHOUT THE QUESEARCH



In today's world an auditor would get a print out copy of the Financial Statements and then would have to cross check individual items that comprise these Financial Statements. For example, in order to substantiate a Gross Receipts number, an Auditor would need to pick random items that comprise this figure and cross-check them for accuracy and reasonableness.

For instance an Auditor might want to check if a certain item that comprises the gross receipt figure has been accurately recorded. She would have to log in to General Ledger to see the Journal Entries comprising the Gross Receipts figure. She would have to search for "Blue Jeans 500" category entries and keep a manual count of such items. Then she would have to log into Inventory System to review the method of calculating Inventory, review shipping records in the Shipping software to see how the items in transit are being recorded, review the methods for recording Returns, Losses and Damages. Then she would review other related systems like Cost Analysis, Supply Chain Management to make sure that his findings are consistent with other records.

WITH QUESEARCH



Search Results 1 - 9 of about 9

Customer: **John Vella**
John Vella jvella@veltech.com.au
[View as HTML](#) [Open in QueWeb](#)

Ticket: 326: test message
... 03. cool mofo bad application From: **John Vella** Sent: 11/17/2007 8:39 To: testinbox@queplix.com Cc: Subject: test message. testinbox ...
Status: Owned, **Priority:** 3-Moderate, **Ticket Type:** BUG, **Origin:** Email, **Impact:** Group, **Created By:** System Administrator, **Product:** DEFAULT_PRODUCT, **Reported In Build:** DEFAULT_VERSION, **Days Open:** 114, **Modified By:** Demo User
[View as HTML](#) [Open in QueWeb](#)

Interaction: RE: QueWeb Ticket : 326 : test message
RE: QueWeb Ticket : 326 : test message cool mofo bad application From: **John Vella** Sent: 11/17/2007 8:39 To: testinbox@queplix.com Cc: Subject: test message
Communication Type: Outgoing Email, **Agent:** System Administrator, **Customer:** John Vella, **Tickets:** 1.
[View as HTML](#) [Open in QueWeb](#)

Interaction: QueWeb Ticket : 326 : test message
From: jvella@veltech.com.au Subject: test message Description: testinbox@queplix.com, 02 Dec 2007 16:03 cool mofo bad application From: **John Vella** Sent: 11/17 ...
Communication Type: Outgoing Email, **Agent:** System Administrator, **Customer:** John Vella, **Tickets:** 1.
[View as HTML](#) [Open in QueWeb](#)

Interaction: QueWeb Ticket : 326 : test message
QueWeb Ticket : 326 : test message Your Ticket has been Assigned to Demo, Demo User. Please disregard this email as it was sent from the demo QueWeb system. ...
Communication Type: Outgoing Email, **Agent:** System Administrator, **Customer:** John Vella, **Tickets:** 1.
[View as HTML](#) [Open in QueWeb](#)

Interaction: QueWeb Ticket : 326 : test message
QueWeb Ticket : 326 : test message test From: jvella@veltech.com.au Subject: test message Description: jvella@veltech.com.au, 17 Nov 2007 13:45

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General Ledger

Inventory

Shipping

Cost Analysis

Supply Chain

While QueSearch cannot completely eliminate the tediousness of an audit process involved in observation, physical evaluation and interviewing, a QueSearch can substantially simplify the process of finding relevant points of reference for the auditor.

This is a very important issue, especially in light of the burden the Sarbanes-Oxley puts on the auditors.

Armed with a QueSearch, an auditor types in "Blue Jeans 500 January-March". In a matter of seconds she gets 5 results from the following:

General Ledger: Showing Gross Sales of Blue Jeans for the first quarter

Inventory System: Current Levels of Inventory, Inter-store Transactions

Shipping System: Number of Jeans in Transit

Returns and Shrinkage System: % of Blue Jeans returned, as well as lost, destroyed and stolen.

Supply Chain: Current Outstanding Orders on Blue Jeans from Suppliers

Cost analysis: Like to Like Store Sales, Season fluctuations, Geographical trends, profitability analysis

An auditor then can drill into the necessary detail of information, print out reports and ask for supporting documentation.

RESULT: By utilizing QueSearch, an auditor is able to drastically improve her efficiency and ability to discover adverse events. A substantial part of auditor's job is to look for the same information in variety of corroborating sources. QueSearch provides an auditor with a tool to dramatically streamline this process through one centrally-managed, easy-to-use interface – Universal Enterprise Search.

Conclusion:

We presented diversity of use cases across several job functions and industries.

Queplix believes that there are dramatic gains in enterprise productivity by using its QueSearch product in conjunction with a competent search engine. Some (but not all) of the additional Use Cases where QueSearch will help improve productivity are:

- Healthcare Administration
- Professional Services Firms (IT, Engineering, Architecture, Advertising etc.)
- Media companies
- Manufacturing
- Utilities/Energy

There are many use cases beyond the ones described or listed here, where enterprise employees will save significant time and incur positive goodwill by using the product.

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