Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager's Guide

For Unified Contact Center Enterprise

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Preface

Welcome to Cisco® Unified EIM and WIM™, multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A unified suite of the industry's best applications for web and email interaction management, it is the backbone of many innovative contact center and customer service helpdesk organizations.

Cisco Unified EIM and WIM includes a common platform and one or both of the following applications:

- Cisco Unified E-Mail Interaction Manager (Unified EIM)
- Cisco Unified Web Interaction Manager (Unified WIM)

About This Guide

Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager's Guide introduces you to the Knowledge Base Console and helps you understand how to use it to accomplish your authoring and publishing tasks.

This guide is for installations that are integrated with Cisco Unified Contact Center Enterprise (Unified CCE).

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, using the Cisco Bug Search Tool (BST), submitting a service request, and gathering additional information, see *What's New in Cisco Product Documentation*, at: http://www.cisco.com/c/en/us/td/docs/general/whatsnew/whatsnew.html.

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We appreciate your comments.

Field Alerts and Field Notices

Cisco products may be modified or key processes may be determined to be important. These are announced through use of the Cisco Field Alerts and Cisco Field Notices. You can register to receive Field Alerts and Field

Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into www.cisco.com and then access the tool at http://www.cisco.com/cisco/support/notifications.html

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
Italic	Emphasis. Or the title of a published document.
Bold	Labels of items on the user interface, such as buttons, boxes, and lists. Or text that must be typed by the user.
`Monospace`	The name of a file or folder, a database table column or value, or a command.
Variable	User-specific text; varies from one user or installation to another.

Document conventions

Other Learning Resources

Online Help

The product includes topic-based as well as context-sensitive help.

Use	To view
Help button	Topics in *Cisco Unified Web and E-Mail Interaction Manager Help*; the Help button appears in the console toolbar on every screen.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Online help options

Document Set

Unified WIM and Unified EIM documentation is available in the `Documents` folder on the product CD. The latest versions of all Cisco documentation can be found online at http://www.cisco.com

- All Unified EIM documentation can be found online at http://www.cisco.com/en/US/products/ps7236/tsd_products_support_series_home.html

- All Unified WIM documentation can be found online at http://www.cisco.com/en/US/products/ps7233/tsd_products_support_series_home.html
- In particular, Release Notes for these products can be found at http://www.cisco.com/en/US/products/ps7236/prod_release_notes_list.html
- For general access to Cisco Voice and Unified Communications documentation, go to http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html

The document set contains the following guides:

- *Cisco Unified Web and E-Mail Interaction Manager System Requirements*
- *Cisco Unified Web and E-Mail Interaction Manager Installation Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*

User Guides for agents and supervisors

- *Cisco Unified Web and E-Mail Interaction Manager Agent's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Supervisor's Guide*

User guides for Knowledge Base managers and authors

- *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager's Guide*

User guides for administrators

- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Chat and Collaboration Resources*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Email Resources*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Data Adapters*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Reports Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to System Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Tools Console*

1 Console Basics

An authoring console, the Knowledge Base Console is used to create, share, and publish the Knowledge Base (KB). The KB is a department's common repository of predefined content for use during interactions with customers. Once created, content in the KB can be shared with other users and published at many locations, enabling consistent and effective “knowledge-powered” customer experiences through all interaction channels—chat, email, phone, and in-person. This console is used by:

- The knowledge manager to design, build, test, and maintain the KB.
- Authors and reviewers to create and manage content by adding, editing, and approving KB articles.
- Contact center managers to set up agent access to the KB.

This chapter introduces important terms and concepts in the KB Console, followed by details of relevant user actions, roles, and permissions. The last section is a tour of the interface.

Key Terms and Concepts

Knowledge Base tree and folders

The Knowledge Base tree reflects the organization of the KB as a hierarchy of folders, subfolders, and articles. It has two nodes at the topmost level:

1. **Lists:** Contains lists to provide shortcuts to various types of useful articles.
2. **Departments:** Includes all KB folders, organized by department. If you have required permissions, you can create, modify, rename, delete, copy, and paste folders other than special folders such as the default lists folders and standard folders. Folders can be moved around using the drag-and-drop feature. You can print all articles in a folder at once by printing the folder.

Content node

The node in the KB tree that holds content in the form of articles that are organized into folders.

Article

An article is the main container of information or knowledge in the KB. These articles are used during customer interactions. Authors create and maintain articles in the KB Console. Attributes of an article are name, description, language, expiry date, macro, content, keywords, attachments, and classifications.

Bookmark

Authors can bookmark certain articles which they feel are apt for resolving customer queries. Agents can view these bookmarked articles in their Reply pane and simply add them in their response to customer query. This saves the time an agent spends in searching for an apt article.

There are three types of bookmarks:

1. Global
2. Queue
3. Personal

Attachment

Authors can add additional content to articles in the form of attachments.

Versions

Authors can view earlier versions of articles.

Approval process

Agents can suggest new articles in the Agent Console. Authors view these suggestions in the KB Console and approve, edit, or reject them.

Knowledge workflows

The content created by authors from the Knowledge Base Console can be processed by knowledge workflows before it is published and becomes part of the knowledge workflow. In a workflow, you define the KB folders and the types of articles in the KB Folders that will be processed by the knowledge workflows. An article processed by a workflow can go through different stages before it is published and becomes part of the Knowledge Base.

Assigning languages

Authors, administrators, and agents are assigned a language when they are created. This language determines the language of any interaction of that user with the knowledge base. By default this language is the primary language of the knowledge base, selected during the installation. Any data created within the knowledge base is automatically assigned the default language.

Related Actions, Roles, and Permissions

All users, including authors, are created in the Administration Console. Users can perform only a defined set of actions for each type of resource. For example, actions for KB articles (a type of resource) include **Create article, Edit article, Print article.**

Pre-defined roles are provided to make it easy to create various types of users by granting them permission to perform a set of actions. Permissions to perform allowed actions on specific objects are individually administered for each user or user group. To learn more about managing users, see the *Cisco Unified Web and E-Mail Interaction Manager Administration Console User's Guide.*

Knowledge Base Manager Role

A knowledge base manager can do all the tasks that a user with the author role can do. In addition to that, he can manage article types and templates and configure knowledge workflows from the Knowledge Base Console. The various actions assigned to the Knowledge Base Manager role are listed in the following table.

Resource Name	Actions Permitted
System Resource	View Agent
System Resource	View Reports
System Resource	View Knowledge Console
User	View
Categories	View
Notes	View, Add, Delete
Resolution	View
KB Folder	Create Folder, Own Folder, View Folder, Edit Folder, Delete Folder, Add Notes, Delete Notes
KB Folder	Create Article, Edit Article, Print Article, Delete Article, Suggest Article, Import Article
KB Folder	Manage Suggestions
KB Folder	Manage Personal Folders, View Personal Folder
KB Folder	Manage Bookmarks
KB Folder	Create Lists, Delete Lists, Edit Lists
Article Template	View, Create, Edit, Delete
Article Type Folder	View, Create, Edit, Delete
Knowledge Workflow	View, Create, Edit, Delete
Manage Stage	View, Create, Edit, Delete
Macro	View, Create, Delete, Edit
Manage Approval process	Manage Approval Process
Report	View, Run, Edit, Delete, Create, Schedule
Text Editor	Edit HTML source for articles
Saved Search	Create, Delete, Edit
Messaging	Create Message, Delete Message

Actions assigned to the Knowledge Base Manager role

The following actions have to be explicitly assigned to authors, if you want them to be able to do the associated tasks.

Resource Name	Actions Permitted
Knowledge Base	Import Translations, Export Translation
KB Folders	Reset Lock

Explicit actions for he Knowledge Base Manager role

User Permissions

Permissions to perform allowed actions on specific objects are individually administered for each user or user group. Permissions are granted on folders, not articles. They are set through the Administration or KB Console.

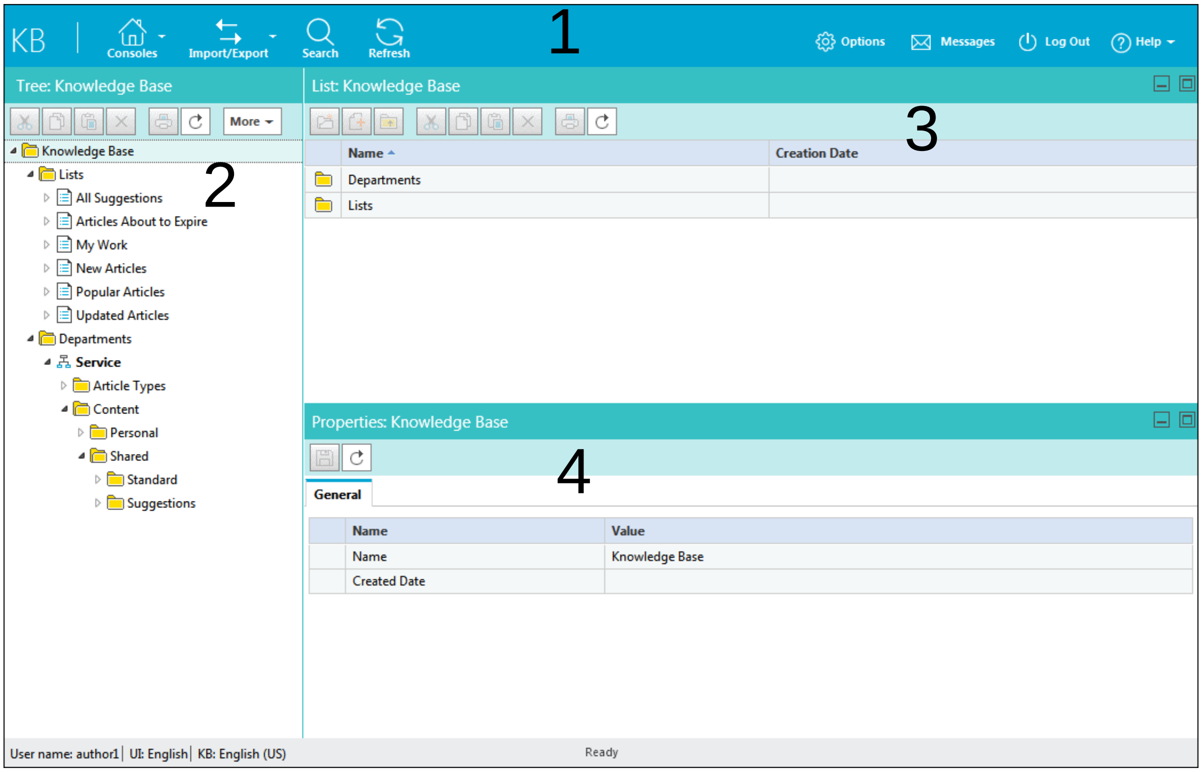
Permissions are used only for folders under the **Shared** node in the KB. Other folders in the KB tree are visible to all authors. Permissions for folders are inherited by sub folders.

- In the KB Console, authors can view all content—approved and suggested—in folders they have permissions to view.
- In the Agent Console, agents can view only approved articles and their own suggestions in the folders they are allowed to view.

Personal folders are meant to be viewed only by individual owners of those folders. However, they can be configured to be available for public viewing.

Elements of the Console Interface

To get to know the console user interface better, let us begin by dividing it into five functional areas:



Elements of the console user interface

1. **Console toolbar:** The console toolbar appears at the top of the screen. It has several buttons which enable you to perform some specific functions. For instance, send and receive internal messages, log out of the system, and access online help for Knowledge Base.

2. **Tree pane:** The Tree pane presents the knowledge base folders as a tree list, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents —sub folders — are displayed in the **List** pane. In this pane, you can cut, copy, or paste folders, delete folders which you have created, manage bookmarks, manage approval process, and print folder contents.

   To expand all first and second level nodes with a single click, shift + click the button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.

3. **List pane:** The List pane displays first-level contents of the folder selected in the Tree pane. You can view the name, description, date of creation, etc., of the displayed contents. Please note that you can view only those columns that the administrator has permitted for display. From the List pane you can create new folders, create new articles, delete folders and articles, print content, copy content, delete and create new folders and articles, cut paste folders and articles, etc.

4. **Properties pane:** The Properties pane displays the attributes of the folder or article selected in the List pane. In this pane, you can define the folder name and description, define the articles name, content, macro, etc.

5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:
   - The user name with which the user has logged in the system.

- The language currently in use
- The status of the system (**Loading, Ready,** etc.)

Personalizing the System

About Options and Settings

Most settings are configured by administrators for the business partition or for each department. The administrator may allow users to configure certain settings as individual options. In the Options window, you can change your password, modify defaults, modify your personal dictionary, and change the KB language.

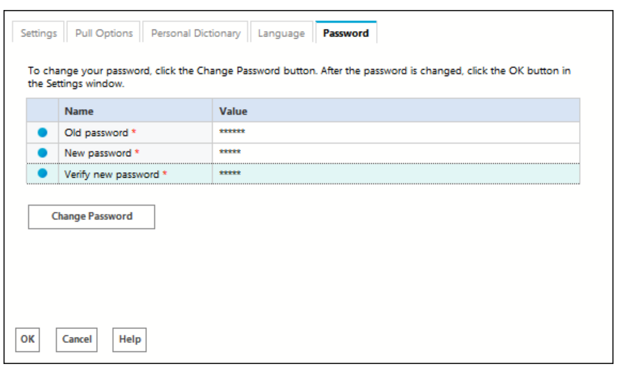
> Important: **Changes made to options take effect on the next login. If you want the changed options to take effect immediately, you must log out of the system and log in again.**

Changing Your Password

To change your password:

1. In the Console toolbar, click the **Options** button.
2. In the Options window, go to the Password tab.
3. On the Password tab, first provide the old password. Then, provide the new password and verify the new password.

   Click the **Change Password** button.



Change your password

4. Click **OK** to close the window.

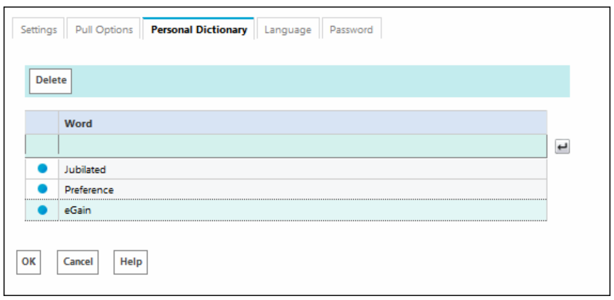
Modifying the Personal Dictionary

To prevent the spelling checker from highlighting words that are specific to your organization, but not part of a standard dictionary, you can update the personal dictionary.

Adding Words to Personal Dictionary

To add words to your personal dictionary:

1. In the Console toolbar, click the **Options** button.
2. In the Options window, go to the Personal Dictionary tab.
3. On the Personal Dictionary tab, click in the field below the Word column heading, type the word you want to add to your personal dictionary and press ENTER.



Add words to the personal dictionary

4. Click the **OK** button.

Deleting Words From Personal Dictionary

To delete words from your personal dictionary:

1. In the Console toolbar, click the **Options** button.
2. In the Options window, on the Personal Dictionary tab, select the word you want to delete and click the **Delete** button.

Changing the KB Language

In deployments configured for more than one language, you can change the KB language for a session.

To set the language:

1. In the Console toolbar, click the **Options** button.
2. In the Options window, go to the Language tab.
3. Select the language.
4. Click **OK**. The language is set for the user session, that is, until you log out of the system.

Managing KB Defaults

Default settings for article types and article templates can be adjusted and reassigned through the Options menu. More information about these features can be found here:

- "About Article Types and Templates" on page 34

Changing Default Article Types and Templates

To change article type and template defaults:

1. In the Console toolbar, click the **Options** button.
2. In the Options window that appears, under the Settings tab, click **Default article type and article template for creating articles.**
3. In the Value column, click the **Assistance** button.
4. Select your default article type and article template from the dropdown menus.
5. Click **OK**.

2
Search for Information

Search is useful for locating articles in the KB folders. Note that you cannot search the contents of another user's personal folder; only the owner of the folder can search through its contents.

Creating Searches

By default, two global searches are created in the system, and they cannot be deleted. In addition to them, you can create more searches.

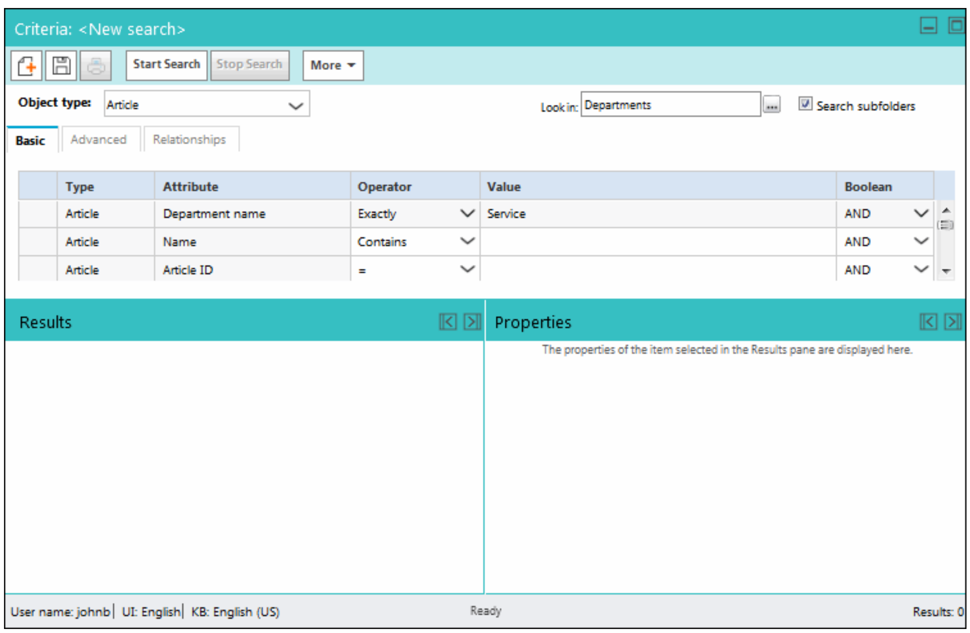
To create a search:

1. In the Knowledge Base Console toolbar, click the **Search** button.

   The Search window appears.

2. In the Search window, go to the Criteria pane toolbar and click the **New** button.
3. Select the object type as **Article.**

   The Criteria pane refreshes to display a list of attributes available for search.



Create a new search

4. Next, select the KB folder where you want to search for articles. In the **Look in** field, click the **Assistance** button and from the Select Folder window select the folder where you want to search.

   Use this option when you are fairly sure that the article you are looking for belongs to a particular folder. You thus limit the scope of search and make it faster.

5. In the Basic tab, specify the search criteria. You can search on attributes such as: department name, article name, article id, article type, case type, case id, question type, text of question, description, keywords, summary, content, macro name, additional information, and related questions.

6. In the Advanced tab, specify additional search criteria options. Advanced search includes attributes such as: last modified date, creation date, availability date, expiration date, commit state, author, owner, profile, previous editor, published, checked out, and checked out by whom. An advanced search narrows down the scope of search and you get only the most relevant results.
7. In the Relationships tab, search for articles by defining the criteria that are related to the classifications, attachments, and workflows. This further narrows down the scope of search. The search supports filtering on the content in .doc .docx, .xls, .xlsx, .ppt, .pptx, .pub, .vsd, .pdf, .html and .txt type files.
8. Click the **Start Search** button to run the search.

   You can view the results of the search in the Results pane. From the Results pane you can export search results, delete articles, and locate articles in the KB Console. And, from the Properties pane you can edit articles.

Deleting Searches

If you want you can delete the searches.

To delete a search:

1. Select the search in the Open Search, Save Search, or Save Search As window.
2. Press the **Delete** key on the keyboard.
3. A message appears asking to confirm the deletion. Click **Yes** to delete the search.

Saving Searches

You can save the search criteria that you use most commonly. This helps you save time, as you can open the saved searches and run them quickly.

To save a search:

1. First, create a search.
2. To save the search, click the **Save** button in the Search window toolbar.
3. In the Save Search window, provide the following details.
   - **Search name:** Type a name for the search. Use a name that adequately represents the search attributes.
   - **Search type:** Select the type of search from the dropdown list. There are two options available.
     - Global Searches: A global search is available to all users.
     - Personal Searches: A personal search is available only to the user who creates it.
   - Click the **Save** button to save the search criteria.

Running Saved Searches

You can access saved searches anytime, by locating and opening them.

To open a saved search:

1. In the Knowledge Base Console toolbar, click the **Search** button.

   The Search window appears.

2. In the Search window toolbar, point to **More** and select **Open**.
3. In the Open Search window, select the search that you want to open and click the **Open** button.

   The search criteria is displayed in the Search window. Now you can run the search.

4. Click the **Start Search** button to run the search.

Stopping Searches

You may want to stop a running search for multiple reasons such as to edit search parameters, limit search results, and so on.

To stop a search:

- In the Search window toolbar, click the **Stop Search** button.

Creating a Search From Saved Searches

You can also create new searches from already saved searches. For example, you have a saved search and you make changes to it. Now, you want to keep the old search and also want to save the new one. Or, if there is a search saved as a global search and you want to save it as a personal search or vice versa.

To create a search from a saved search:

1. First, open a saved search.
2. In the Search window toolbar point to **More** and select **Save As**.

   The Save Search As window appears.

3. In the window provide the following details.
   - **Search name:** Type a name for the search. Use a name that adequately represents the search attributes.
   - **Search type:** From the dropdown list, select a type of search. There are two options available:
     - **Global Searches:** A global search is available to all users.
     - **Personal Searches:** A personal search is available only to the user who creates it.

   Click the **Save** button.

Locating Articles in the Console

After you have run the search and get some search results, you can easily locate the articles returned by the search in the KB Console with a click of a button. You are automatically taken to the exact KB folder in which the article is located.

To locate an article in the console:

1. After you run the search, from the Results pane select the article you want to locate in the console.
2. In the Results pane toolbar, point to **More** and select **Locate in Console**. You are taken to the exact location of the article in the console.

Exporting Search Results

You can save a local copy of the search results on your computer. Once you save the results on your local machine or network, you do not have to be logged in to the console to access the search results. The results are saved in Excel format.

To export the search results:

1. After you run the search, in the Results pane toolbar, click the **Export** button.
2. A message appears asking, if you want to open or save the search results. Click the **Save** button.
3. A message appears asking where you want to save the results. Select the location where you want to save the results. The results are saved in the Excel format.

Printing Search Results

You may want to print search results to either review further or share with others.

To print search results:

1. After you have run the search, click the **Print** button in the Criteria pane toolbar.
2. In the Print Options window, do the following.
   a. From the available options select what you want to print. The options available are **Criteria, Results,** and **Details.**
   b. Specify if you want to print all the results or selected results only. Click **OK**.

   The Print Preview for Search window appears. It shows the details of all the articles selected for printing.
3. In the Print Preview for Search window, click the **Save As** button. In the Save As window that appears, select the format in which you want to save the contents of the articles.

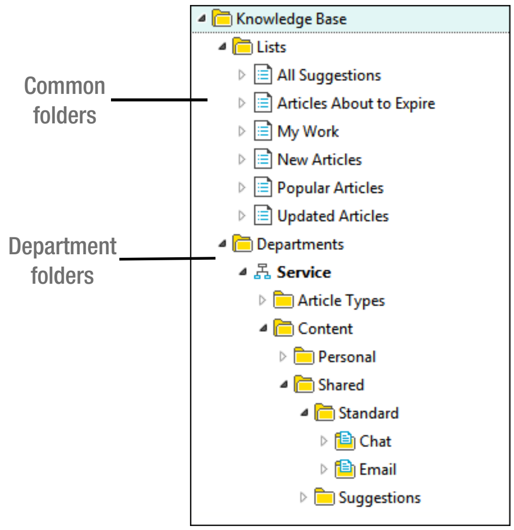
   The options available are Adobe Acrobat PDF and Microsoft Excel. Click the **OK** button.

3

KB Tree and Folders

The folder structure in the KB Console makes it easy to create and manage the KB. The KB includes certain predefined folders. If you have the required permissions, you can create, modify, rename, delete, copy, and paste folders. You can print all articles in a folder at once by printing the folder.

Various objects under these folders have unique ID's to help with search functionality, which can be found under the General tab of the Properties pane. The ID's for these objects can also be added to the List pane by adjusting the display options in the Tools Console.



Folders in the KB Console Tree pane

Department Folders

The **Departments** node in the KB tree includes all KB folders, organized by department. There are three root folders under each department folder.

Article Types

This node holds the article types and templates, which are used for creating articles.

Content

This node holds content in the form of articles, which are organized into folders and sub folders.

Shared

The shared folder is a pre-defined folder, and it cannot be renamed. You cannot create articles directly under this folder. However, you can create sub folders under it and articles inside sub folders.

The Shared folder contains the Standard folders.

Standard

The Standard folder cannot be renamed. This folder contains sub folders called **Chat** and **Email**. You cannot create additional sub folders under the Standard folder. You can create additional sub folders under the sub folders of chat and email folders.

The chat and email folders contain additional sub folders:

- Chat
  - Quick Links
  - Quick Responses
- Email
  - Headers
  - Greetings
  - Footers
  - Signatures

Suggestions

The Suggestions folder is a pre-defined folder. Through the Agent Console, users can suggest articles or responses to be included in the KB. This folder contains a list of such articles suggested by users.

Personal

When a new user is created in the system, a folder for that user is created in the personal folder. Folders in the personal folder can be created by agents through the Agent Console. The agent who creates a personal folder is the owner of that folder. As an owner, he can create and manage articles and sub folders within his personal folder.

If a personal folder is made available for public viewing, then other KB users can view it. Knowledge Base (KB) users with the Manage Personal Folder action can see all personal folders. Such users can also modify or delete the folder contents for all users.

This folder is pre-defined and it cannot be renamed. Sub folders and articles can be created directly under this folder. All articles created under a personal folder are directly approved and saved. They do not go through the suggestion and approval process.

Managing Folders

Creating KB folders is a two-fold process. First, you create KB folders, and then assign permissions to other users to work in the folders.

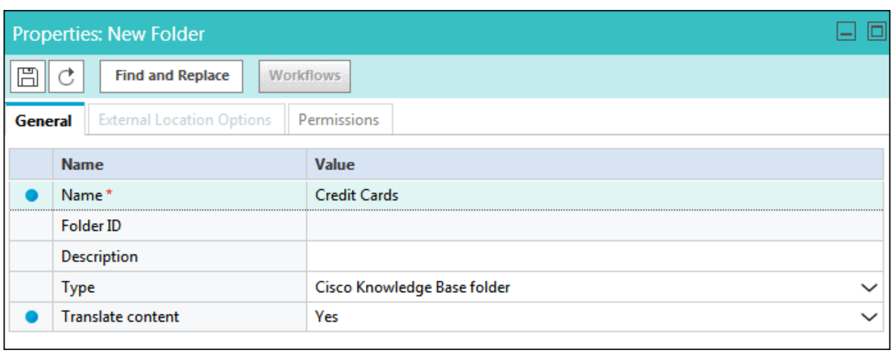
Creating Folders

You can create folders and sub folders to organize articles. Remember that you require the necessary permissions to create and modify folders.

To create a folder:

1. In the Tree pane, browse to **Knowledge Base** > **Departments** > *Your Department* > **Content**.
2. Select the folder in which you want to create a new folder.
3. In the List pane toolbar, click the **New folder** button.

   The Properties pane refreshes to show the attributes of the new folder.
4. In the Properties pane, go to the General tab and provide the following details.
   - **Name**: Type a name of the folder.
   - **Folder ID:** The unique ID of the folder. This is automatically provided.
   - **Description**: Type a brief description.
   - **Type**: Select the type as **Cisco Knowledge Base folder**.
   - **Translate:** Select **Yes** if you want the articles in this folder to be considered for translation when the content is exported for translation.

   Type general properties of the folder

5. Click the **Save** button. The new KB folder is created. Now you can create articles and sub folders in this folder. You can also give other users permissions to work in these folders. For more information, see "Assigning Permissions for Folders" on page 30.
6. Click the **Workflows** button to apply a knowledge workflow to the folder. You need the Knowledge Base Manager role to do this task. If this role is not assigned to you, you will see a read-only view of the workflows that are applied to the KB folder. For details see "Applying Knowledge Workflows" on page 50.

Assigning Permissions for Folders

After you have created KB folders, you can give the following permissions to users and user groups who need to work within these folders.

- Own folder
- View folder: This permission is given automatically when you give the following permissions: Delete folder, Create folder, Create article, Edit article, Delete article, or Suggest article. And, when the View folder permission is removed, all permissions are removed automatically.
- Edit folder
- Delete folder
- Create folder: When you give the Create folder permission, the Create article permission is assigned automatically.
- Create article: The create article permission is given automatically when you give the Create folder permission.
- Edit article
- Delete article
- Suggest article

Important: **Permissions can be given only to those users and user groups who have the appropriate actions assigned to them. When permissions are given to a user group, all users in that user group get those permissions automatically.**

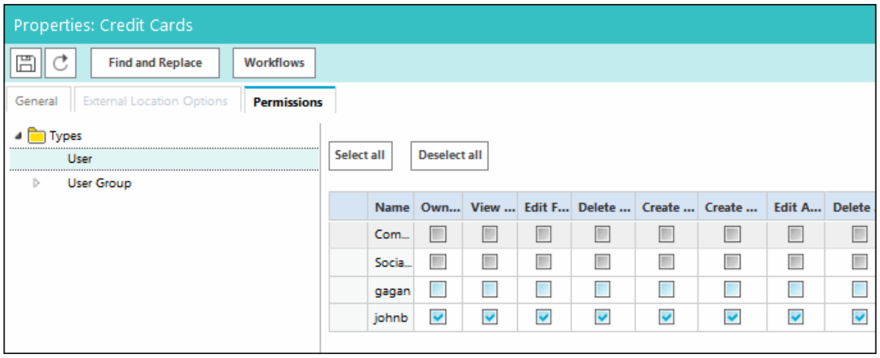
To assign permissions:

1. In the Tree pane, browse to **Knowledge Base** > **Departments** > *Your Department* > **Content**.
2. Select the folder on which you want to assign permissions.
3. In the Properties pane, go to the Permissions tab and assign permissions to users and user groups on the folder.

   You can assign permissions in two ways:

   - Assign a permission to each user individually.
   - Use the **Select all** button to give a permission to all the users in one go. For example, if you have to give the view permission to all users, instead of giving the view permission to each user individually, you can select the permission by clicking in the column and use the **Select all** button to give the view permission to all the users.

Permissions can be given only to the users and user groups who have the appropriate actions assigned to them. If the actions are not assigned to users, then the permissions options against their name appear disabled.



Set up access to a folder

4. Click the **Save** button.

Deleting Folders

You can delete a folder only if you have the permission to do so. When you delete a folder, all its contents and sub folders get deleted automatically.

To delete a folder:

1. In the Tree pane, browse to **Knowledge Base** > **Departments** > *Your Department* > **Content**.
2. Select the folder which you want to delete. You can select multiple folders for deletion.
3. Click the **Delete** button.

> Important: **The Delete button is enabled only if you have been assigned permissions to delete the folder. If you are deleting multiple folders and you do not have permission to delete all of them, only folders that you are permitted to delete get deleted. You are notified about folders that are not deleted.**

Copying Folders

You can easily move around the KB folders after you have created them. You can either create a copy of the folder in another folder, or you can remove it from one folder and move it to another one.

When you copy a folder to another folder, the users inherit the permissions of the folder to which it is being moved. And, when you move a folder from one folder to another, the users inherit the permissions of the folder to which it is being moved and also of the folder from which it is being moved.

Some things to note about workflows when folders are moved or copied from one location to another:

- When a folder is moved to another folder, or when a folder is copied from one folder and pasted to another, it retains the workflows that are associated with it and does not inherit any workflows from the new parent folder.

To create copies of a folder:

1. In the Tree pane, browse to **Knowledge Base** > **Departments** > *Your Department* > **Content**.
2. Select the folder you wish to copy or move.
3. If you want to move a folder from one folder to another, use the **Cut** button to remove the folder from the folder in which it exists. Go to the folder in which you want to add it and click the **Paste** button.
4. If you simply want to create a copy of an existing folder, use the **Copy** button to copy the folder and go to the folder in which you want to add it and click the **Paste** button in the List pane toolbar.
5. After the folder is copied, check the permissions assigned to users. If required, edit the properties of the newly created folder.

4

Article Types and Templates

About Article Types and Templates

Article Types

The system comes with one out-of-the-box article type - **General**. You can create new article types as you deem necessary. When authors create new articles they select the type of article they are creating. Article types are used in knowledge workflows to define the type of articles which the workflow can process.

Users with the following actions can work on article types: Article type folder - View, Create, Edit, Delete. These actions are part of the out-of-the-box Knowledge Base Manager role.

Article Templates

For each article type in the system, you can create a different set of article templates. Article templates are standard articles containing layout and styles to be used by authors to create new articles. They act as a starting point for new articles. If you delete or edit an article template, it does not affect the articles that are using the template.

Users with the following actions can work on article templates: Article templates - View, Create, Edit, Delete. These actions are part of the out-of-the-box Knowledge Base Manager role.

To prompt users to select the article type and template when they create a new article, make sure that the department level setting **Select article type and article template on create** is enabled.

Managing Article Types

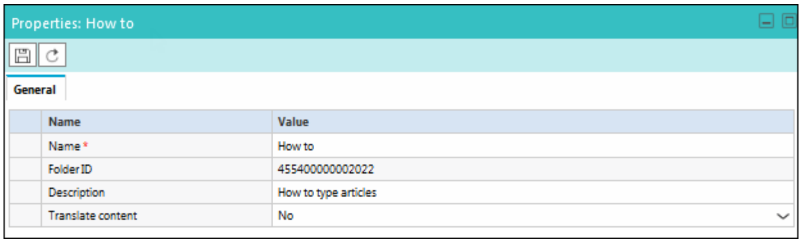
Creating Article Types

To create an article type:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Article Types.**
2. In the List pane toolbar, click the **New Article Type** button.

   The Properties pane refreshes to show the attributes of the new article type.
3. In the Properties pane, go to the General tab and provide the following details.
   - **Name:** Type a name of the folder.
   - **Description:** Type a brief description.

- **Translate:** Select **Yes** if you want the article templates for this article type to be considered for translation when the content is exported for translation.



Create new article types

4. Click the **Save** button.

Deleting Article Types

You can delete Article types only if the "Delete Article Type" action is assigned to you. Once an article type is used to create an article, it cannot be deleted. You can always rename the types.

Note that when an article type is deleted, all article templates created for that type are automatically deleted.

To delete an article type:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Article Types.**
2. Select the article type in the Tree pane or List pane.
3. Click the **Delete** button and confirm the deletion.

Managing Article Templates

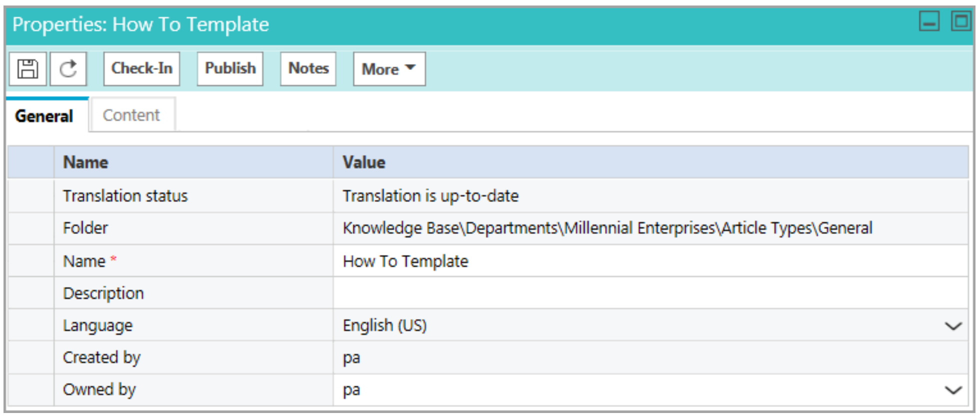
Creating Article Templates

To create an article template:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Article Types >** *Article Type Name*.
2. In the List pane toolbar, click the **New Article Template** button.

   The Properties pane refreshes to show the attributes of the new article template. This article template is a draft and is unavailable for use for authors until it is published or checked in. However, once the article template is checked-in, other KB Managers can view it and work on it.
3. In the Properties pane, go to the General tab and provide the following details:
   - **Translation status:** This field tells you whether the translation is up to date or whether the content needs to be translated. This field is updated by the system.
   - **Folder:** It displays the path of the article type for which you are creating the template. The value of the field is generated automatically and it cannot be changed.

- **Name:** Type a name of the article template. This is required information.
- **Description:** Type a brief description.
- **Language:** Displays the language of the article template. The value in the field gets automatically selected and cannot be changed. It can have one of the following values: English (US), English (UK), Arabic, Chinese (Simplified), Chinese (Traditional), Czech, Danish, Dutch, Finnish, French, German, Greek, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmal), Norwegian (Nynorsk), Portuguese, Portuguese (Brazilian), Romanian, Russian, Spanish, Swedish, Turkish
- **Created by:** Shows the name of the user who creates the article template.
- **Owned by:** Shows the name of the user who owns the article template.



Set the general properties

4. Now, go to the Content tab and create the template. This template becomes the starting point for authors when they create a new article using the template. In the template you can define the styles and layout of the articles. The process of creating a template is very similar to writing content for an article:

   a. By default, all article templates are HTML. To create a plain text article, do not use any HTML elements while creating your article.

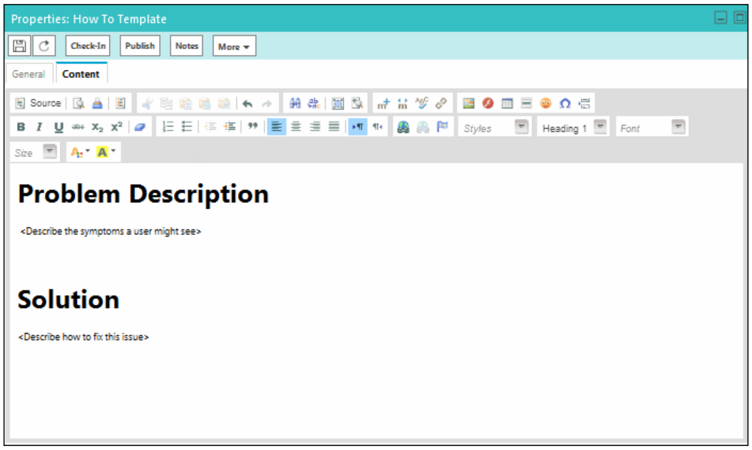
   b. Type the content of the article template in the text box. Here you can use the various formatting tools available to format the article content. You can also add hyperlinks to articles.

   c. To add hyperlinks to the content, click the **Link** button in the Text box toolbar and in the Link window, enter the details of the hyperlink you want to add. You can also specify a target for how the content should open (same window, new window, etc.), and configure advanced options like language direction (for example, right to left, for Arabic). Click **OK** to add the link.

   d. To insert an image from an external location, click the **Image** button and provide the URL in the Image Properties window. The images should be stored at a location that is accessible to external user. If the image is removed from this external resource or the address is changed, the inserted image will no longer be visible. Instead, a red X or a placeholder may appear in its place. You can also define the URL that should be launched when a user clicks the image. Use the Advanced tab to specify additional details such as long URL, language, etc.

   e. You can also use the Styles and Templates that are available with the editor. To modify or add styles and templates, please contact Customer Support.

   Now, go to the Source sub tab of the Content tab. In the Source sub tab, you can view the HTML code of the content created in the Layout sub tab. You can make changes to this code if you are familiar with HTML coding. The changes made to the code are reflected in the content of the article template. If you are using the Plain text editor, then the Source sub tab is not available. If you make any changes to the Layout or Source sub tab and switch between the sub tabs, you cannot undo the changes using the **Undo** button or the Windows shortcut (Ctrl+Z).



Create the content of the article template

5. Click the **Save** button.

Deleting Article Templates

You can delete article templates only if the “Delete Article Template” action is assigned to you. When you delete an article template, it does not affect the articles that are using the template.

To delete an article template:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Article Types >** *Article Type Name.*
2. In the List pane, select the article template you want to delete.
3. Click the **Delete** button and confirm the deletion.

Managing Article Templates Versions

A new version of an article template is created every time the article template is checked out. The KB Console stores and displays all such versions of each article template. The version details of an article can be accessed only from the KB Console.

When an article template is published, you have the option to enter a summary of the changes that have been made. In addition, you can edit the summary for other article states in the Manage Article Templates Versions window.

If you decide you like an older version of an article template better, you can revert back to that version.

The versions for article templates are managed the same way as the versions for articles. There is only one difference. Since article templates do not have attachments and metadata, the Attachments and Metadata tabs are not available for them. For details about managing versions, see the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager’s Guide*.

5

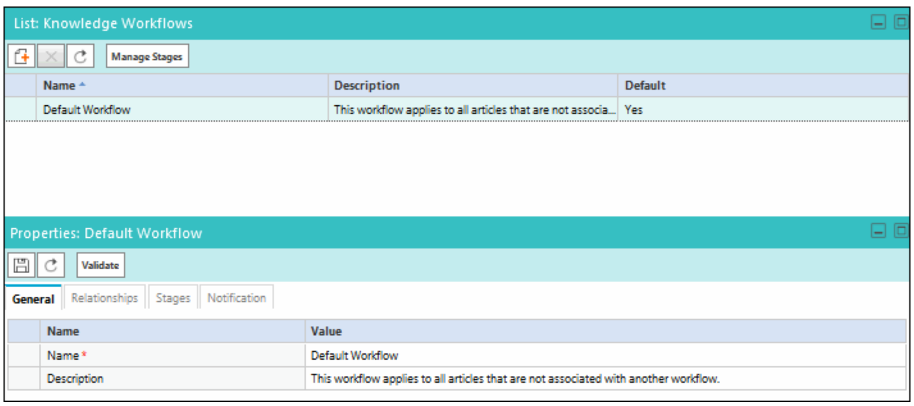
Knowledge Workflows

About Knowledge Workflows

Create knowledge workflows to review the content created by authors from the Knowledge Base Console. In a workflow, you define the KB folders and the types of articles in the KB Folders that will be processed by the knowledge workflows. An article processed by a workflow can go through different stages before it is published and becomes part of the Knowledge Base. Each stage in the workflow can have different contributors who can act on the article and move it forward, or send it back for edits. At each step in the workflow, notifications can be sent to submitters and owners as articles go through workflows or are sent back to draft stage, and to contributors as articles are available to work on.

Users with the following actions can manage Knowledge Workflows: Knowledge Workflows - View, Create, Edit, Delete. These actions are part of the out-of-the-box Knowledge Base Manager role.

Knowledge workflows do not act on articles submitted from the Agent Console. Use the KB Approval Process (page 61) for such suggestions.



Manage Knowledge Workflows

Key Elements of a Knowledge Workflow

Default Knowledge Workflow

The system comes with a default workflow, which is a master workflow, and applies to all folders that do not have specific workflows applied to them. The out-of-the-box workflow has only the Draft and Published Stages - which means that an article can be created and published directly without any review. Knowledge Base Managers can enhance this workflow by adding custom stages and reviewers.

Knowledge Base Managers

Knowledge Base Managers are authors with the Knowledge Base Manager role who have the authority to create article types and article templates (page 33), create knowledge workflows (page 42), and apply workflows to KB Folders (page 50).

Owners of Articles

An owner is the user who owns the article. When an article is created the first time, the owner is the same as the submitter of the article. The owner of the article can be changed at any point later.

Submitters of Articles

A submitter is any user who works on an article in draft stage and sends the article to the Knowledge Workflow. The user who starts the process of sending the article through the knowledge workflow, automatically becomes the submitter of the article. At a later point, if another user edits the same article and sends the article through the workflow again, he becomes the new submitter of the article.

Contributors

Contributors are users who are part of the different stages of the workflows. They can move the articles forward, or send back the article to previous stages in the workflow. Contributors in the final stage get to publish the articles.

Stages

Stages allow you to create a multi-step knowledge workflow. Each stage in the workflow can represent the type of review that needs to happen for the KB articles before they are published. For each stage, you define the users and user groups that can work on the article. When a user group is selected as a contributor, any user in the group can work on the article to move it to the next stage. Likewise, when a user group is given skip permissions for a stage, any user in the group can skip this stage when sending articles through the workflow. For details, see "Managing Stages" on page 41.

Notifications

Workflows can be configured to send internal and external notifications to submitters and owners of articles and to contributors in each stage of the workflow. Submitters and owners get notifications when articles are moved from one stage to another, when articles are sent back to draft stage for edits, and when the submitted article are published. Contributors get a notification when new articles are available to work on. Users can be notified in two ways - Internal notifications and External emails. For details, see "Managing Notifications for Knowledge Workflows" on page 46.

My Work List

The My Work list is available from **Knowledge Base > Lists**. This list displays all the articles that are assigned to contributors by the knowledge workflows. Contributors work on these articles to move them to the next stage in the workflow. If the content of the article is not satisfactory, they can send the article back to a previous stage for edits. The My Work folder does not display the articles that are sent back to Draft stage.

Planning a Knowledge Workflow

1. Decide and create the types of articles (page 33) the workflow will process.

2. Decide and create the KB Folders (page 29) that the workflow will process.
3. Decide and create the stages (page 41) you want to use in the workflow.
4. Decide and create the users and user groups who will be contributors in the various stages of the workflow. Make sure these users have at least the View folder and Edit Article permissions on the folders that will be processed by the workflow.
5. Plan the notifications (page 46) you want to send out for the workflows and create the articles to be used in these notifications.
6. Create the Knowledge Workflow (page 42).
7. Apply the workflow (page 50) to specific KB folders and article types.

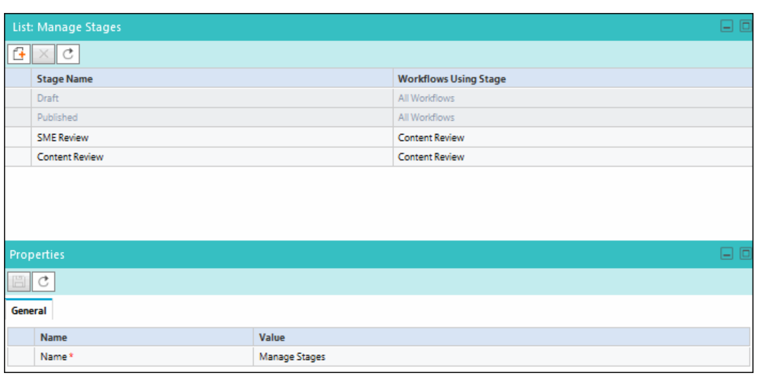
Managing Stages

About Stages

Stages allow you to create a multi-step knowledge workflow. Each stage in the workflow can represent the type of review that needs to happen for the KB articles before they are published. For each stage, you define the users and user groups that can work on the article. When a user group is selected as a contributor, any user in the group can work on the article to move it to the next stage. Likewise, when a user group is given skip permissions for a stage, any user in the group can skip this stage when sending articles through the workflow.

By default the system comes with the Draft and Published stages. Draft is the starting stage of every workflow. An article gets created in the draft stage and then it is moved through the stages created by the Knowledge Base Manager, till it is ready for publishing. Users in the last stage of the workflow publish the article and the article automatically goes to the Published stage.

Users with the following actions can manage stages: Manage Stage - View, Create, Edit, Delete. These actions are part of the out-of-the-box Knowledge Base Manager role.

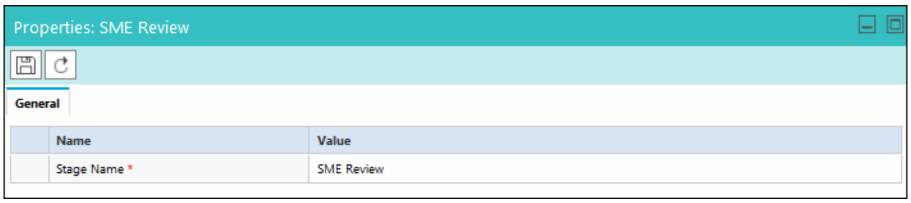


Manage Stages window

Creating Stages

To create a stage:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Department Name*.
2. In the Tree pane toolbar, point to the **More** menu and select **Knowledge Workflow.**
3. In the Knowledge Workflows window, click the **Manage Stages** button.
4. In the Manage Stages window, click the **New** button.
5. In the Properties pane, in the **Stage Name** field provide the name of the stage and click the **Save** button.



Create a new stage

Deleting Stages

Out-of-the-box stages - **Draft** and **Published**, and stages that are in use in workflows cannot be deleted.

To delete a stage:

1.In the Tree pane, browse to **Knowledge Base > Departments >** *Department Name*.

2.In the Tree pane toolbar, point to the **More** menu and select **Knowledge Workflow.**

3.In the Knowledge Workflows window, click the **Manage Stages** button.

4.In the Manage Stages window, select the stage you want to delete and click the **Delete** button.

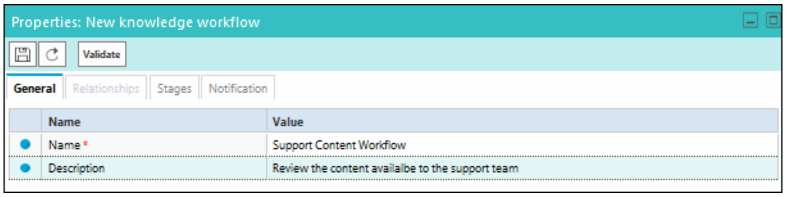
Creating Knowledge Workflows

Before creating workflows, create the stages for the workflows and decide the users and user groups who will work on articles as they go through the different stages of the workflow. Also, create the articles you want to use in the notifications for workflows.

To create a workflow:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Department Name*.
2. In the Tree pane toolbar, point to the **More** menu and select **Knowledge Workflows.**
3. In the Knowledge Workflows window, click the **New** button.
4. In the Properties pane, go to the General tab and provide the following details:
   - **Name:** Type a name of the Knowledge Workflow.

- **Description:** Type a brief description.

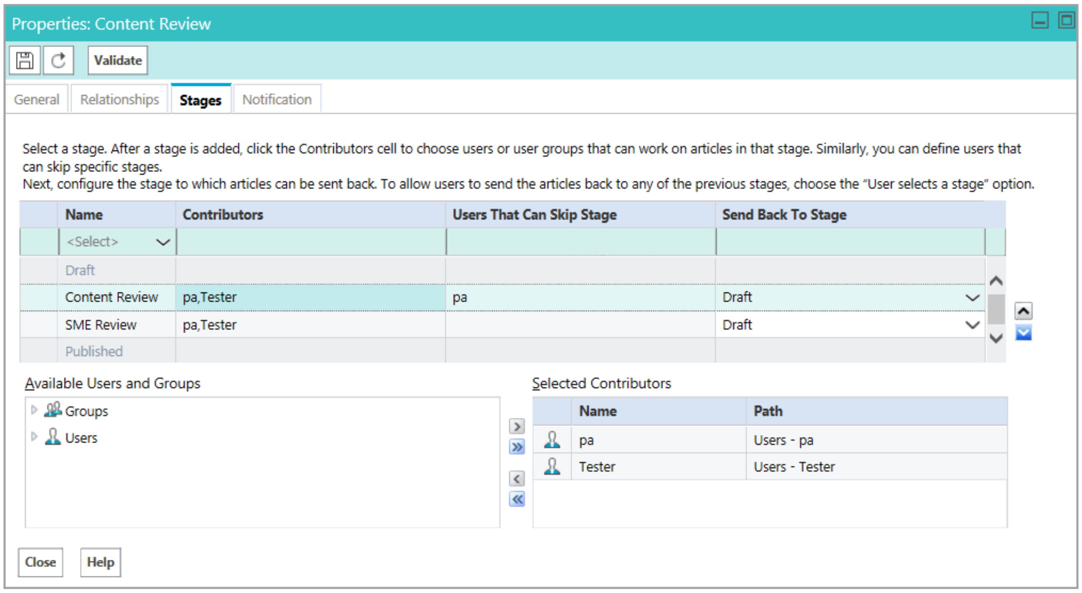


Provide a name and description for the workflow

5. Next, go the Stages tab, and do the following.
   - In the **Name** field select the name of the stage.

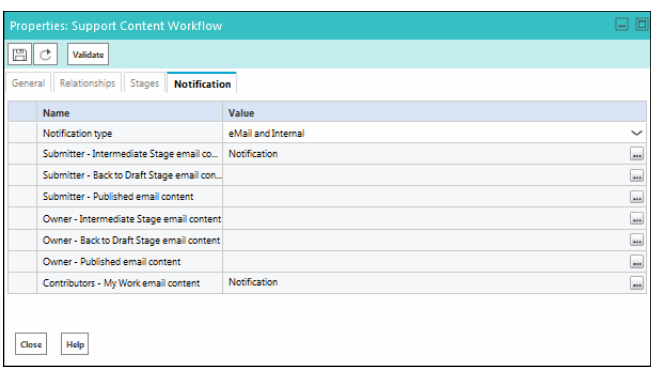
     A new row is created between the **Draft** and **Published** stages and the option to select users for the stage is made available. Click the cell in the **Contributors** column or the cell in the **Users** column that can Skip Stage column and the option to select users for the stage is made available.
   - After clicking the Contributors field for that stage, select the users and user groups from the **Available Users and Groups** list who can work on articles in this stage and add them to the **Selected Users and User Groups** list. Make sure that the selected read-write contributors have View Folder and Edit Articles permissions and the selected read-only contributors have the View Folder permissions on the folders which will be processed by this workflow. The Selected Users and User Groups field gives a read-only view of the selected users and user groups.
   - After clicking the Skip Stage field for that stage, select the users and user groups from the Available Users and Groups list who can skip this stage and add them to the Selected Users and User Groups list. Make sure that the selected users have the necessary View Folder and Edit Articles permissions on the folders which will be processed by this workflow. The **Selected Users and User Groups** field gives a read-only view of the selected users and user groups.
   - In the **Send Back to Stage** field, select the stage to which articles will be sent back to in case edits need to be made by users in previous stages. You can either pick a specific stage, or you can allow the users to pick a stage. The **User selects a stage** option appears only when there are more than one stages available before the stage being configured.

Repeat these steps to add more stages to the workflow. The order of stages defines the flow of the workflow. You can change the order of these stages, or remove the stages you do not want to be part of the workflow. For details, see “Managing Stages for Workflows” on page 45.



Set the stages for the workflow

6. Click the **Validate** button to validate the workflow. A workflow is validated only if at least one reviewer in each stage of the workflow has permissions to the folders in which the selected workflow is being used.
7. Click the **Save** button.
8. Lastly, in the Notification tab set up notifications for the knowledge workflow process. For details, see “Managing Notifications for Knowledge Workflows” on page 46.



Enable notifications for the workflow

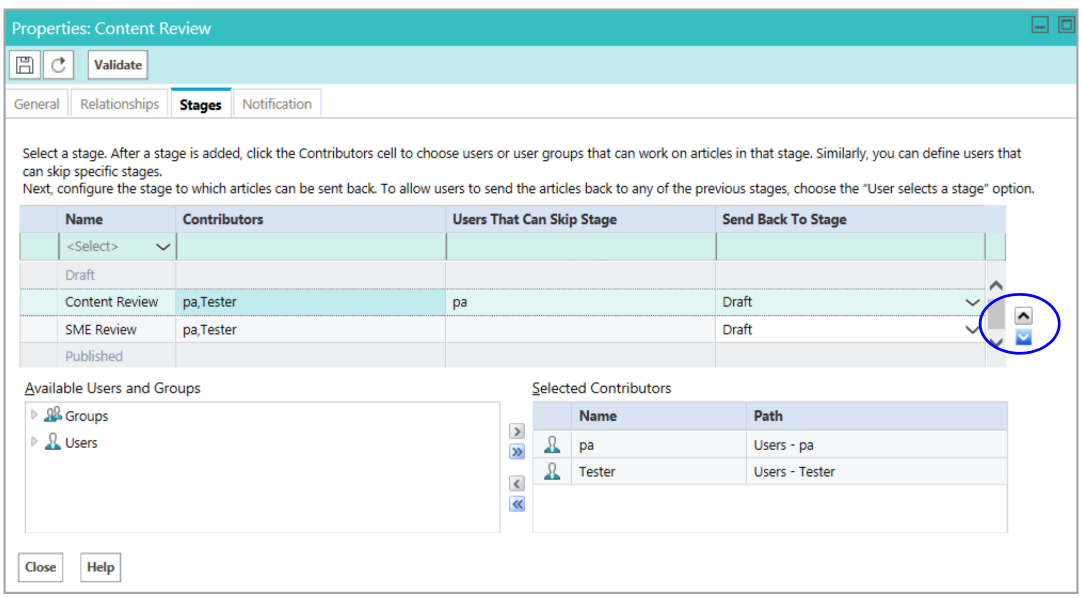
9. After creating the workflow, associate the KB Folders (page 50) with the knowledge workflow. A read-only view of these associations is displayed in the Relationships tab of the workflows.

List of folders and article types associated with the workflow

Managing Stages for Workflows

To change the order of stages in a workflow:

1. Select the workflow you want to edit.
2. Click the Stages tab.
3. Change the order of the stages by using the **Move Up** or **Move Down** buttons. When you move stages, the value in the **Send Back to Stage** field is reset to **Draft**. After you have moved a stage, make sure you check and change the value in this field.

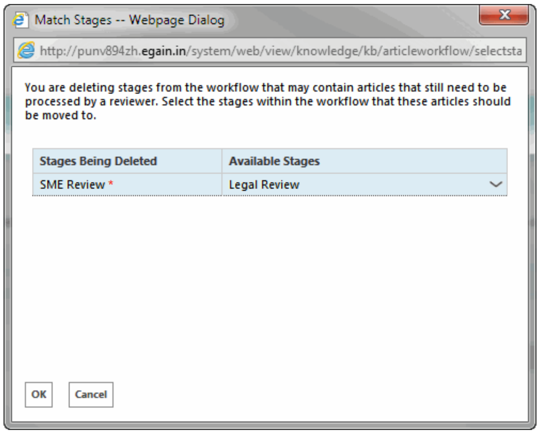


Rearrange stages

To remove a stage from the workflow:

1. Select the workflow you want to edit.
2. Click the Stages tab.
3. Select the row of the stage you want to delete from the list and press the delete key.

4. Click the **Save** button. At this point you are prompted to match the stages being deleted to the available stages. This ensures that articles from the stages being removed are automatically sent to the available stages in the workflow. If you are just left with the **Draft** and **Published** stages in a workflow, then you can only send back the articles to the **Draft** stage.



Match the stages

Deleting Knowledge Workflows

A knowledge workflow cannot be deleted if a KB folder is using the workflow. Before deleting the Knowledge Workflow, remove the association between the KB folder and the workflow. The names of the folders that use a workflow are available in the Relationships tab of the workflow.

Important: **Out-of-the-box default workflow cannot be deleted.**

To delete a knowledge workflow:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Department Name*.
2. In the Tree pane toolbar, point to the **More** menu and select **Knowledge Workflow.**
3. In the Knowledge Workflows window, select the workflow you want to delete.
4. In the List pane toolbar, click the **Delete** button. Confirm the deletion.

Managing Notifications for Knowledge Workflows

Internal and external notifications can be sent to submitters and owners of articles and to contributors in each stage of the workflow. Internal notifications use the Internal Messaging feature, and these notifications are available from all Consoles (from the Messages button in the Console Toolbar) of the product. External notification emails are sent to the email address specified as the business email address of the user from the Administration Console (from the user properties, General tab > Business section).

Submitters and owners get notifications when articles are moved from one stage to another, when articles are sent back to draft stage for edits, and when the submitted article are published. Contributors get a notification when new articles are available to work on. There are no skip stage notifications. The type of notification that is sent will be based on which stage the article is sent to, regardless of what stages may or may not have been skipped.

If at any time, an article lands in a stage where no contributor can work on an article, a system notification is sent to the KB Manager.

Types of Notifications

- **Submitter - Intermediate stage change notification:** This notification is sent to the submitter when an article moves from one stage to another.
- **Submitter - Back to draft notification:** This notification is sent to the submitter when an article is sent back to draft stage.
- **Submitter - Published notification:** This notification is sent to the submitter when an article is published.
- **Owner - Intermediate stage change notification:** This notification is sent to the owner when an article moves from one stage to another.
- **Owner - Back to draft notification:** This notification is sent to the owner when an article is sent back to draft stage.
- **Owner - Published notification:** This notification is sent to the owner when an article is published.
- **Contributors - My work:** This notification is sent to contributors when articles become available to work on in a stage.

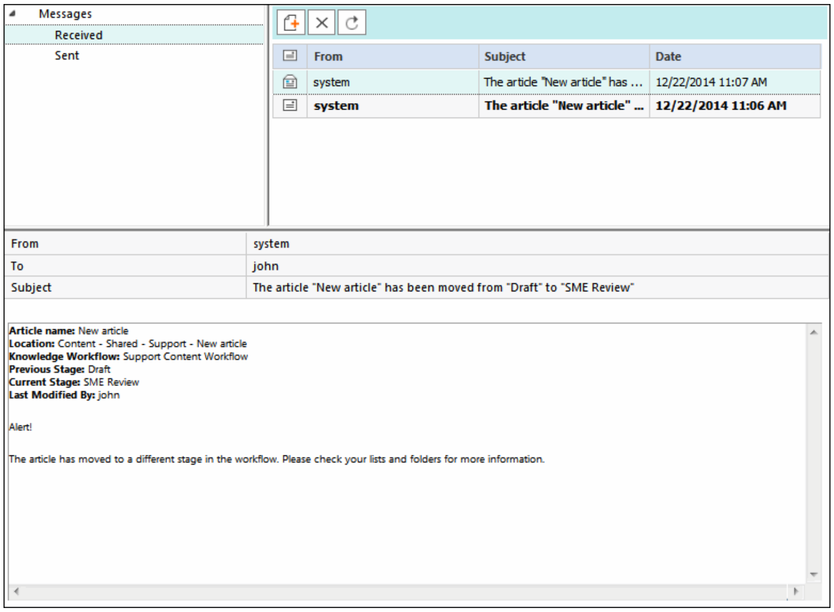
Out-of-the-box Content of Notifications

Notifications come with out-of-the-box content which cannot be changed. In addition to this content, you can add your own content using KB Articles. Before you begin, create the articles you want to use in each notification. If you do not want to add any content in addition to the out-of-the-box content, you can create a single blank article and use that for all notifications. However, you have to select an article to enable these notifications.

Typically, notifications have the following out-of-the-box content:

- Article name
- Location
- Knowledge Workflow
- Previous Stage
- Current Stage

- Last Modified By



Sample notification

Example of how users are notified

For example, let us say you have a workflow with three stages in the specified order:

1. Initial Review
2. Legal Review
3. Final Review

Three authors in the system who can submit articles:

- Jane
- Mike
- John

Three authors who can work on articles in the three stages are:

- Tracy - contributor in Initial Review stage
- Laura - contributor in Legal Review stage
- Kristen - contributor in Final Review stage

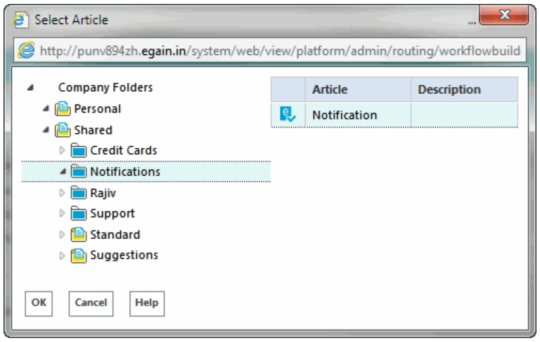
The following table describes the notifications which will be sent as articles are processed by the workflow.

Action	Submitter Notifications	Owner Notifications	Contributor Notifications
Jane creates an article “How to create an account” and sends it to the Initial Review stage.	_	_	Tracy gets a notification
Tracy picks the article sends it back to the draft stage.	Jane gets the Back to draft email notification.	This notification is not sent as Owner and Submitter are the same.	_
Mike works on the article and sends it to the Initial Review stage. Note: Submitter is changed to Mike.	_	_	Tracy gets a notification.
Tracy sends the article to the Legal Review stage.	Mike gets the Intermediate stage email notification.	Jane gets the Intermediate stage email notification.	Laura gets a notification.
Laura approves the article and sends it to the Final Review stage.	Mike gets the Intermediate stage email notification.	Jane gets the Intermediate stage email notification.	Kristen gets a notification.
Kristen approves the article and publishes it.	Mike gets the Published email notification.	Jane gets the Published email notification.	_
Now, John picks the “How to create an account” article, makes edits to the article, makes himself the owner of the article, and sends it to the Initial Review stage. Note: Owner and Submitter are changed to John.	_	_	Tracy gets a notification
Tracy picks the article and sends it back to the draft stage.	John gets the Back to draft email notification.	This notification is not sent as Owner and Submitter are the same.	_

To set up notifications:

1. Create a knowledge workflow.
2. In the Notification tab, specify the following:
    - **Notification type:** Select the type of notifications to be sent during various stages of the process. You can send emails, internal messages, or both emails and internal messages.
    - **Submitter or Owner - Intermediate stage email content:** Click the **Assistance** button and from the Select Article window, select the article. This will be the content of the notification sent when an article

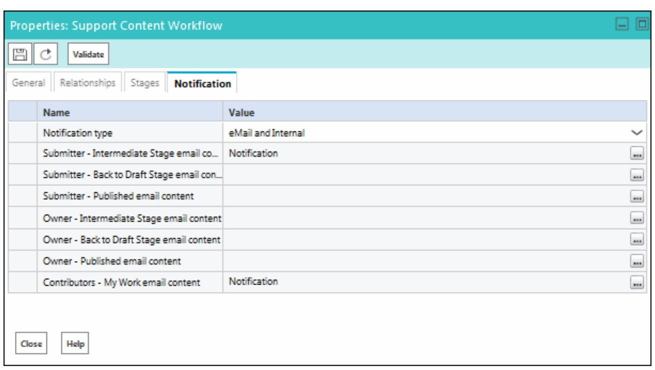
moves from one stage to another. If you do not want to add any content in addition to the out-of-the-box content, append a blank article to the notification.



Select an article for the notification message

- **Submitter or Owner - Back to draft email content:** Specify the content of the notification to be sent when an article is sent back to the draft stage. If you do not want to add any content in addition to the out-of-the-box content, append a blank article to the notification.
- **Submitter or Owner - Published email content:** Specify the content of the notification to be sent when an article is published. If you do not want to add any content in addition to the out-of-the-box content, append a blank article to the notification.
- **Contributors - My work email content:** Specify the content of the notification to be sent to contributors when articles become available to work on in a stage. If you do not want to add any content in addition to the out-of-the-box content, append a blank article to the notification.

If at any time, an article lands in a stage where no contributor can work on an article, a system notification is sent to the KB Manager.

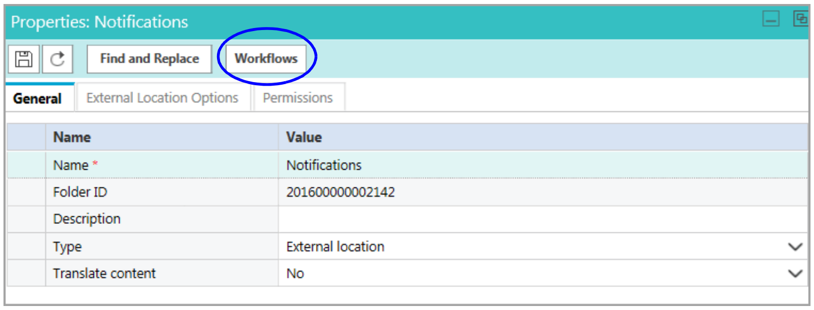


Enable notifications for the workflow

3. Click the **Save** button.

Applying Knowledge Workflows

After you have created workflows (page 42), you need to apply these workflows to the KB Folders. For each KB Folder, you can either apply the same workflow to all article types, or you can select different workflows for different article types. The association between Knowledge Base folders and Article Types and workflows is set from the Knowledge Base folder properties. Once the association is made, that information is presented in the Relationships tab of the workflow in read-only view.



Configure workflows for KB folders

Important Things to Note About Configuring Associations

- The Default Workflow is a master workflow and applies to all KB folders that do not have a specific workflow association. This association is implied and is not visible in the Workflows for folder: *Folder Name* window. There is one exception. If you explicitly assign the default workflow to the KB folder, at that time the association is no longer implicit and is listed along with other associations.
- If all article types need to processed by the same workflow, select the "All types' option while setting up the association. This ensures that when new article types get added, they are automatically processed by the selected workflow. However, in future, if you need to apply different workflows to different article types, the workflow has to be reset for all article types.
- If a workflow is applied to a top level folder, all sub-folders in that folder automatically inherit the same workflow. Inheritance is always established from the immediate parent folder of the sub-folder. However, this inheritance can be overwritten at the sub folder level. At any point you want to reset the overwritten inheritance, you can select the "Inherit from parent" option while setting up the association.

Some things to note about workflows when folders or articles are moved or copied from one location to another:

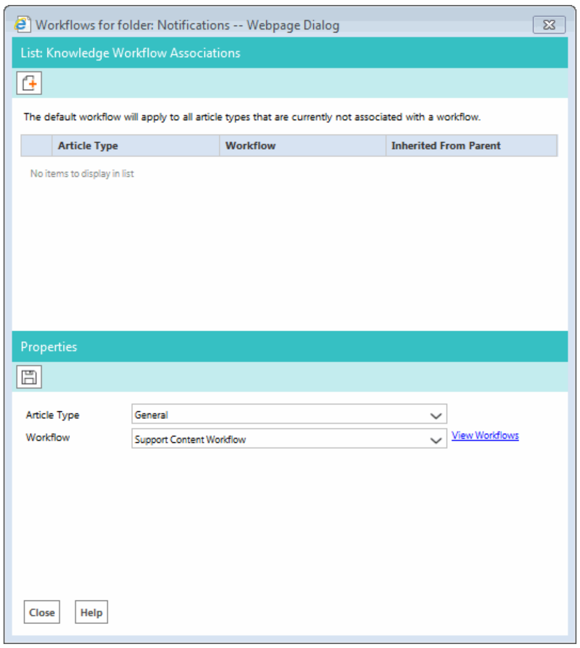
- When a folder is moved from one folder to another, or copied from one folder and pasted to another, it retains the workflows that are associated with it and does not inherit any workflows from the new parent folder.
- When an article is moved from one folder to another, the workflow of the new folder applies to the article. If both folders have the same workflows, the article retains its stage. If the workflow changes, the article is sent back to Draft stage and is processed by the new workflow.
- Copied articles are always in draft stage.
- Only users with the Knowledge Base Manager role can apply workflows to KB Folders.

To apply workflows to KB folders:

1. In the Tree pane, browse to **Knowledge Base** > **Departments** > *Your Department* > **Content** > **Shared** > *Folder Name*.
2. In the Properties pane, click the **Workflows** button.

3. In the Workflows for folder: *Folder Name* window, do the following.
4. Click the **New** button.
5. In the Properties pane, set the following:
   - From the **Article Type** dropdown, select the article types to be processed by the workflow. Select the **All types** option to apply the same workflow to all types of articles.
   - From the **Workflow** dropdown, select the workflow which will apply to the KB folder and the selected Article Type. Click the View Workflows link next to the dropdown to view the properties of the available workflows.

   Make sure that the contributors selected in the workflow being applied have the View Folder and Edit Articles permissions on the KB folder.



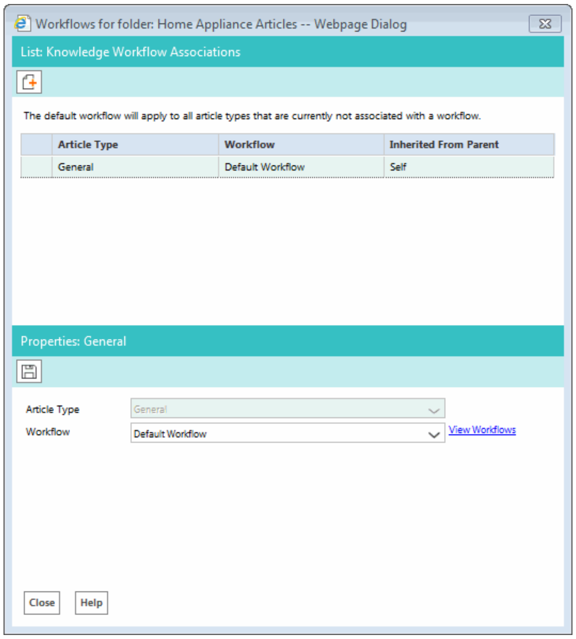
Apply a workflow to the KB folder

6. Click the **Save** button.

To change association of article types with workflows:

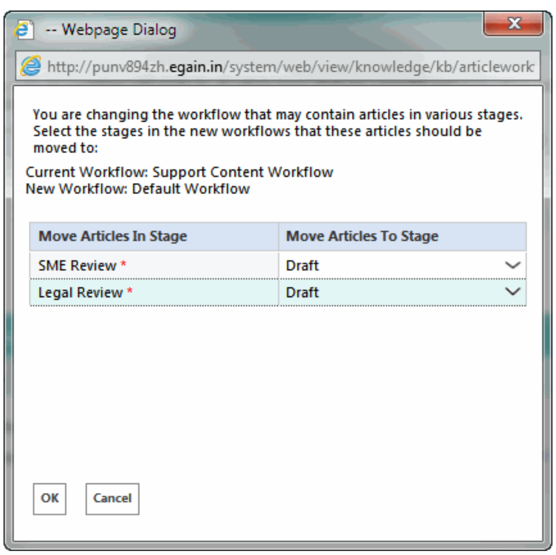
1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Content > Shared >** *Folder Name.*
2. In the Properties pane, click the **Workflows** button.
3. In the Workflows for folder: *Folder Name* window, do the following.
   a. In the List pane select the configured association.
   b. In the Properties pane, set the following:
      - The **Article Type** dropdown is read-only and displays the name of the article type for which you are changing the association.
      - From the **Workflow** dropdown, select the workflow which will apply to the selected Article Type. if you want the selected article type to inherit the workflow from the parent folder, select the

Inherit from parent option. Click the **View Workflows** link next the dropdown, to view the properties of the available workflows.



Change the workflow

4. If the KB folder has articles (of the selected type) that are being processed by the current workflow, you will be asked to move them. In the window, select the stages in the new workflows that these articles should be moved to and click **OK.**



Match stages

Working on Articles in Knowledge Workflows

Two types of users work on articles in knowledge workflows:

- **Submitters** are users who author new articles, or edit existing ones, and start the process of sending articles through workflows. Some submitters can be configured to skip stages in the workflow to speed up the publication process.
- **Contributors** are users who are part of the different stages of the workflows, and can move the articles forward, or send back the article to previous stages in the workflow. How contributors function within the workflow depends on how each one is configured and where they are in the workflow:
  - Contributors with edit permissions can change the content within the article before moving it.
  - Contributors with read-only permissions can only review the article before moving it forward or back in the workflow.
  - Select contributors may be able to skip selected stages in the workflow to speed up the publication process.
  - Contributors in the final stage, or with the ability to skip to the final stage, can publish the articles.

Articles can be worked on from two places. These are:

- **My Work List:** Contributors see all their work items in the **Knowledge Base > Lists > My Work** folder and can work on articles from there. The List pane displays the articles that are assigned to you (or a group of users) by the knowledge workflows. Here, you can view the current stage of the workflow in which the article resides, as well as its progression within the workflow. You need to work on these articles to move them to the next stage in the workflow. If the content of the article is not satisfactory, you can send the article back to a previous stage for edits. This is a workspace only for the Contributors. Submitters cannot create or edit articles from here and the **My Work** folder does not display the articles that are sent back to Draft stage.
- **Folders containing the articles:** All the submitted articles are also available in the folders to which they belong, i.e. from **Knowledge Base > Departments >** *Department Name* **> Content >** *Folder Name*. As a contributor, you can act on articles from here or from the My Work list. As a submitter, this is the only place from which you work, i.e. this is the place from where you edit and create articles, and work on articles that are sent back to Draft stage.

Notifications:

- As articles go through workflows, users can get notifications when articles are available for review, are sent back to draft stage, or when articles are published. The types of notifications you get depends on how workflows are configured.

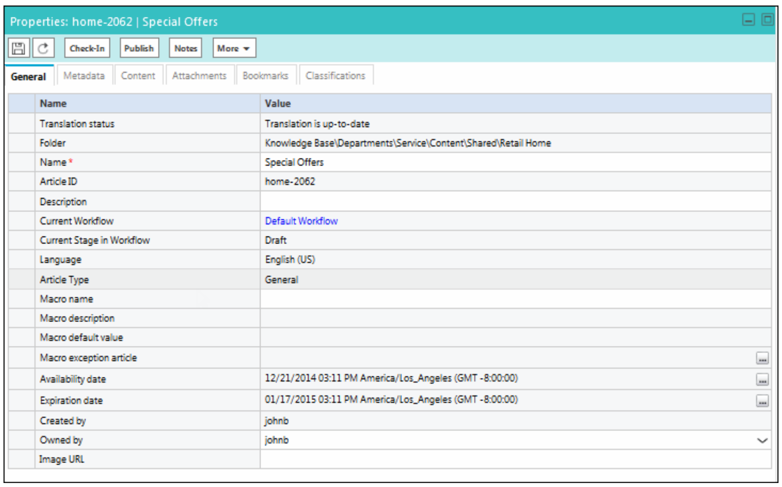
To work on articles in knowledge workflows:

1. In the Tree pane, browse to K**nowledge Base > Lists > My Work.** You can also view and work on articles from the folders to which they belong (**Knowledge Base > Departments >** *Department Name* **> Content >** *Folder Name*).
2. In the List pane, select the article you want to work on. Checkout the article and after you are done working on the article, use one of the following buttons to move the article in the workflow: **Send To** button, **Send Back to** button, and **Publish** button.

   When an article is going through a Knowledge Workflow, submitters and contributors in the different stages of the workflow will get different options (buttons in the Properties pane) for the articles:

- **Send To** button: Lists all the stages, in the order they are configured in a workflow, to which an author can send an article.
- **Send Back To** button: Lists all the stages, in the order they are configured in a workflow, to which a contributor can send the article back to. When you are sending back an article, you are prompted to add a note to the article. The note is a way of conveying the changes that need to be made to improve the article. If you do not want to add a note, click Cancel and close the notes windows.
- **Publish** button: Publish the article so that it becomes part of the Knowledge Base.

If a folder does not have a workflow, the **Send to** and **Send Back To** buttons are not available and only the **Publish** button is available.



Sample article

The buttons that authors see and the options that each button presents, varies based on how the Knowledge Workflow is configured. The following table describes the various actions the submitters and contributors can take as they work on the articles.

Actor	Send To button options	Send Back To button options	Publish button
Submitter	▸ The first stage in the workflow. ▸ If the submitter is also a contributor in the first stage, he can skip the first stage and send the article to the second stage of the workflow. Likewise, he can skip all subsequent stages where he is a contributor, and send the article to the stage where he is not a contributor. ▸ If the submitter has permissions to skip certain stages, he can choose to skip all such stages and send the article to the stage where he is not a contributor.	Not available as the article is being submitted.	If the submitter of the article is a contributor in every stage of the workflow, including the final stage, or he has permissions to skip all the stages in the workflow, he can directly publish the article.
Contributors in intermediate stages	▸ The next stage in the workflow. ▸ If the contributor acting on the article is also a contributor in the subsequent stages, he can choose to skip all such stages and send the article to the stage where he is not a contributor. ▸ If the contributor acting on the article has permissions to skip stages, he can choose to skip all such stages and send the article to the stage where he is not a contributor.	▸ Contributors in the first stage can send back the articles only to the Draft stage. ▸ Contributors in all other stages can send back the article to the last stage, or can pick a stage from the list of available stages before the current stage. This depends on how the workflow is configured.	If the contributor acting on the article is a contributor in every subsequent stage, including the final stage, or he has permissions to skip all the stages in the workflow, he can directly publish the article.
Contributor in the final stage	Not available as the article is in the final stage.	Contributors can send back the article to the last stage, or can pick a stage from the list of available stages before the current stage. This depends on how the workflow is configured.	Contributors in the final stage get to publish the article.

6 Bookmarks

In this chapter we will learn about the importance of bookmarks, types of bookmarks, and how articles can be bookmarked.

About Bookmarks

A bookmark is a valuable tool that helps locate articles faster than is otherwise possible. Bookmarks are very important as they can save time and add to the efficiency of agents. As a best practice you should bookmark the most frequently used articles by the agents. These bookmarks become available to the agents in a special list and they can use them while replying to emails.

The three types of bookmarks are global, queue, and personal bookmarks.

- Global bookmarks are available to all the users who have view permissions on the folder in which the bookmarked article is located. For example, let us say there is a KB folder *Laptop* on which *user1* has view permissions and *user2* has no permissions. When you globally bookmark an article from the *Laptop* folder, *user1* will be able to view the bookmark and not *user2.*
- Queue bookmarks are associated with a queue. When a user is working on an activity from a particular queue, they see the bookmarks associated with that queue.

> Important: **You need to at least have view permissions on the queues to be able to bookmark articles for the queues.**

- Personal bookmarks can be created and viewed only from the Agent Console. They are for the personal reference of the agents, and they can create them according to their needs.

As a KB author or user with appropriate permissions, you can create or delete global and queue bookmarks from the KB Console. Agents can create or delete personal bookmarks from the Agent Console.

> Important: **Articles created in the personal and chat folders cannot be bookmarked.**

Bookmarking Articles

Articles can be bookmarked in two ways:

- Bookmark articles individually while creating them.
- Bookmark selected articles using the manage bookmarks option.

Bookmarking Individual Articles

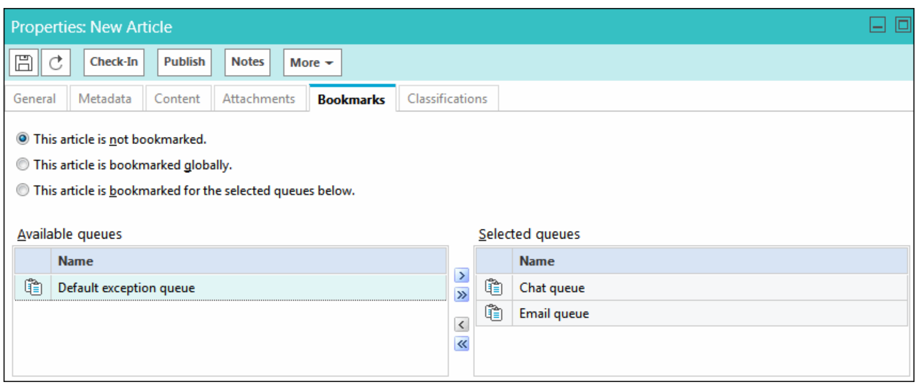
You can bookmark articles individually while creating them.

To bookmark an article:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Content > Shared >** *Your Folder.*

Important: **Articles created in the personal and chat folders cannot be bookmarked.**

2. In the List pane, select the article you want to bookmark.
3. In the Properties pane, go to the Bookmarks tab and select one of the following options:
   - **This article is not bookmarked:** This option is selected by default.
   - **This article is bookmarked globally:** Select this option to bookmark the article for all the users who have view permission on the folder.
   - **This article is bookmarked for the selected queues:** Select this option to bookmark the article for selective queues and select the queues for which you want to bookmark the article.



Bookmark the article

4. Click the **Save** button.

Managing Bookmarks

Using the manage bookmarks option you can first create the articles and then bookmark them. From here, you can also get an overview of all the articles bookmarked for queues and the globally bookmarked articles.

To manage bookmarks:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department.*
2. In the Tree pane toolbar, point to **More** and select **Manage bookmarks**.

   The Manage Bookmarks window appears. Here you can check which articles are bookmarked for each queue and which articles are bookmarked globally. Also, if required, you can add or remove bookmarks.

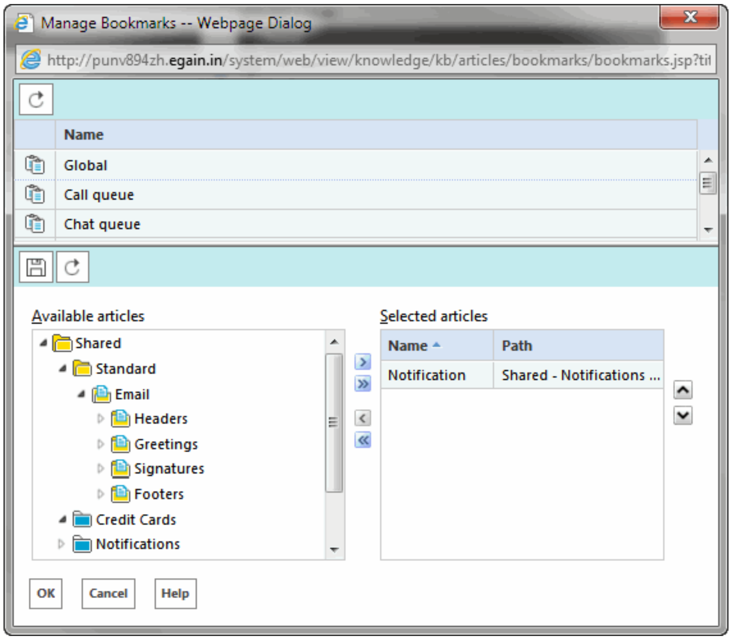
3. In the Manage Bookmarks window, do the following:

   a. Select **Global**, if you want to bookmark articles globally. Or, select a queue for which you want to bookmark the articles.

Important: **Articles can be bookmarked for multiple queues. But, an article that is bookmarked globally cannot be bookmarked for individual queues.**

   b. Now, select the articles you want to bookmark.

   c. Click the **Save** button.



Manage all bookmarks for a department

7 Suggestions

An up-to-date knowledge base is an important asset for any business. A good way to keep your KB updated is to set up an article suggestion process that allows agents to contribute articles.

Managing Approval Processes

An article created from the Agent Console by an agent is initially in the suggested state. It is processed based on defined approval processes. These articles can then be reviewed to approve them or sent back to the agent for modifications. Articles added to personal folders are approved automatically and do not follow the review process.

The system provides one predefined approval process.

The approval process does not act on articles created by authors from the KB Console. Use the Knowledge Workflows (page 38) for reviewing the content created by the authors.

About Approval Levels and Groups

While planning your approval process, decide the number of levels in the process and the number of approvers at each level. The order in which you specify the approvers is the order in which approvers work on the suggestions. When you want only a single user to be a designated approver at an approval level, then select a user from the list. When you are okay with any one user from a group of users to approve the articles at an approval level, then select a user group. It is important to note that when you select individual users, and not user groups, only the selected individual is notified of the suggestion and can approve the article at the defined approval level. Only after the user has approved the article, it becomes available to the next level of approvers.

Creating Approval Processes

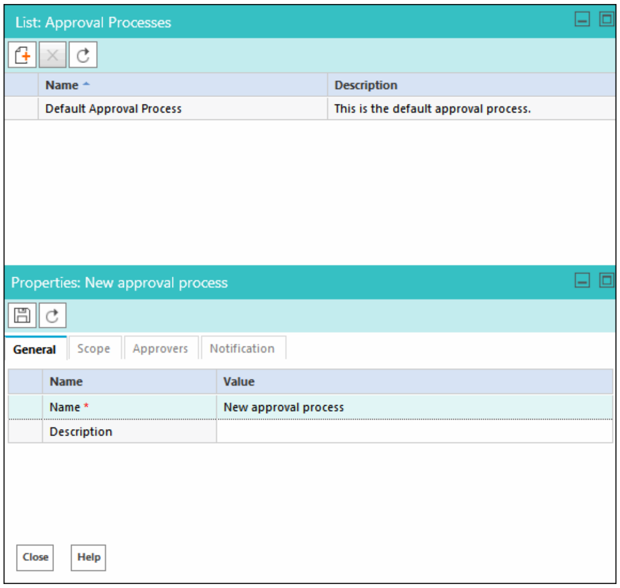
Important: **Before creating an approval process, create the users who will be part of the process and the KB folders for which you want to set the approval process.**

To create an approval process:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department.*
2. In the Tree pane toolbar, point to **More** and select **Manage Approval Processes**.
3. In the Manage Approval Processes window, click the **New** button.

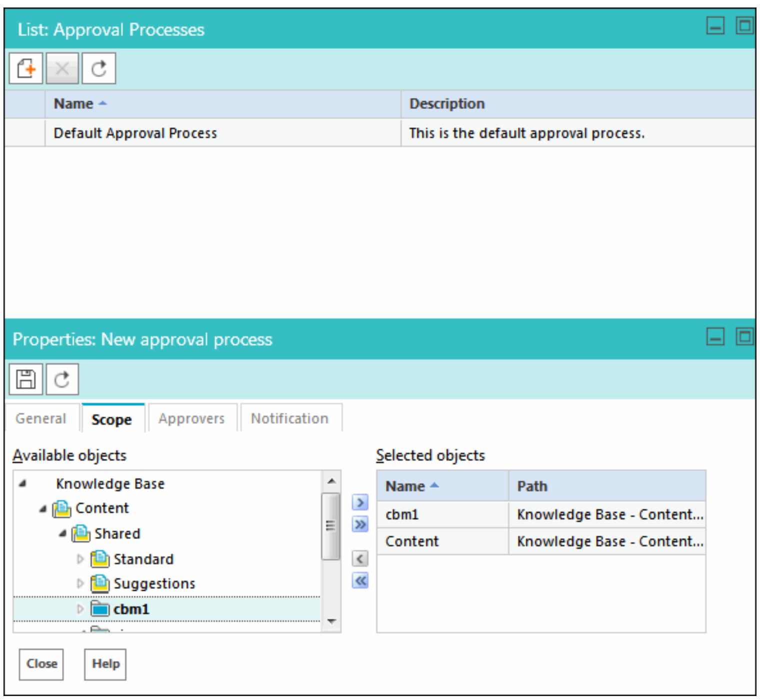
   The Properties pane refreshes to show the attributes of the new approval process.
4. In the Properties pane, go to the General tab and provide the following details:
   - **Name:** Type a name of the approval process.

- **Description:** Type a brief description.



Set the general properties

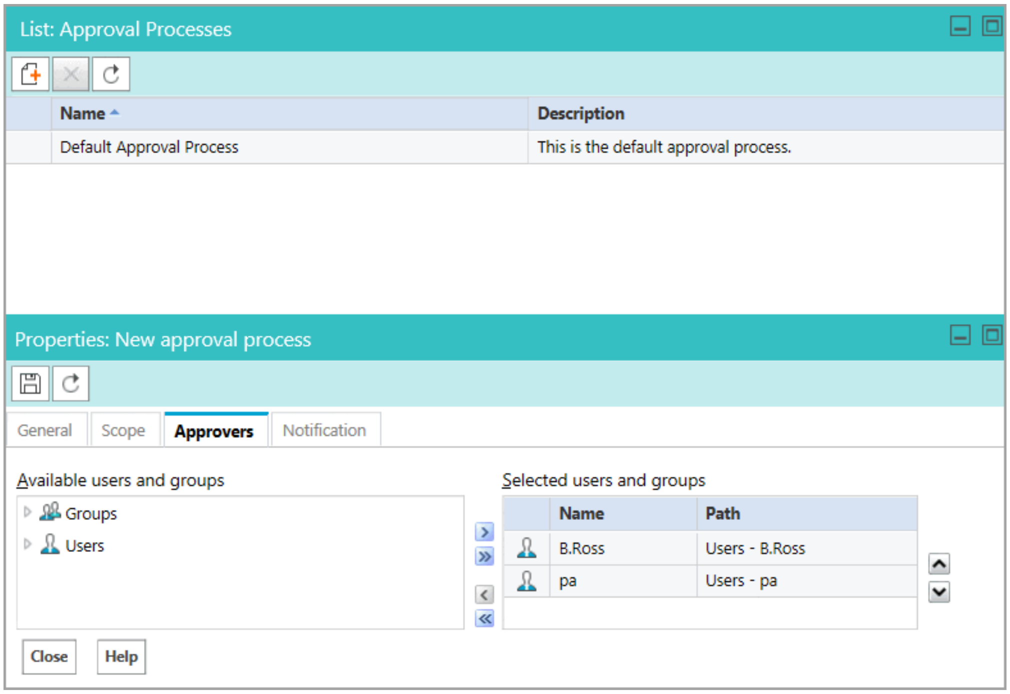
5. Next, go the Scope tab and specify the folders to which the approval process will apply.



Configure scope of the approval process

6. Now, go to the Approvers tab and specify the users who should approve articles in the folders selected in the Scope tab. You can select from standalone users and user groups, IPTA integrated users and IPTA integrated user groups, NIPTA integrated users and NIPTA integrated user groups. Change the order of approvers by using the **Move Up** and **Move Down** button. The order you specify here is the order in which approvers

work on the suggestions. For more details, see “About Approval Levels and Groups” on page 62.



Select approvers

7. Lastly, in the Notification tab set up notifications for the approval process. For more details, see “Setting up Notifications” on page 64.
8. Click the **Save** button.

Important: **You must specify the name, scope, and at least one approver to be able to save the approval process.**

Setting up Notifications

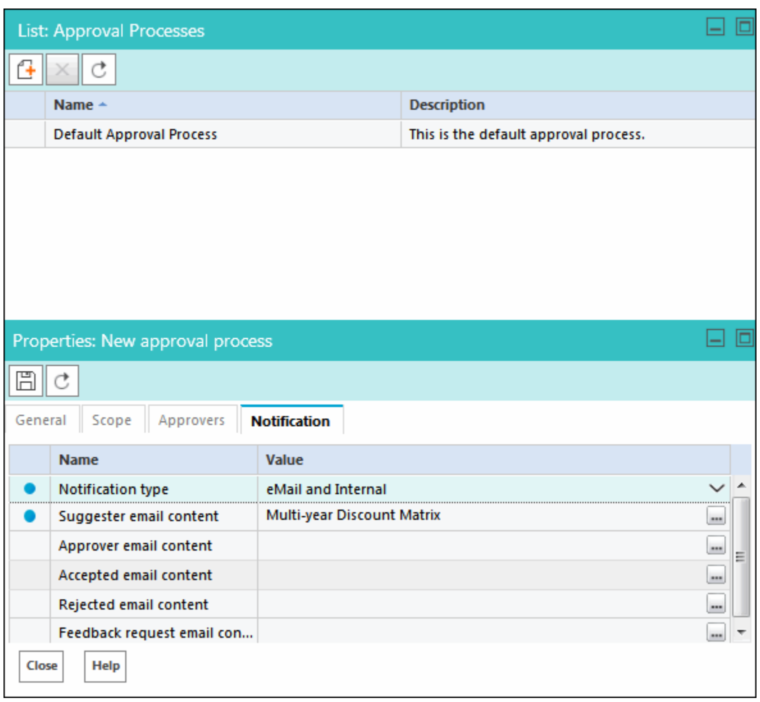
Notifications are messages and emails sent to internal users through the messaging infrastructure. You can send a notification when a suggestion is submitted, approved, rejected, or sent back with feedback.

Before setting up notifications, create the articles to be used in the five types of notifications you can send.

To set up notifications:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department.*
2. In the Tree pane toolbar, point to **More** and select **Manage Approval Processes**.
3. In the Manage Approval Processes window, select an approval process.
4. In the Properties pane, go to the Notification tab and provide the following details:

- **Notification type:** Select the type of notifications to be sent during various stages of the process. You can send emails, internal messages, or both emails and internal messages.
- **Suggester email content:** Specify the content of the notification email to be sent to the suggester when a suggestion is submitted. Click the **Assistance** button in the field and select an article from the Select Article window.
- **Approver email content:** Specify the content of the notification email to be sent to the approver when a suggestion is submitted. Click the **Assistance** button in the field and select an article from the Select Article window.
- **Accepted email content:** Specify the content of the notification email to be sent to the suggester when a suggestion is approved. Click the **Assistance** button in the field and select an article from the Select Article window.
- **Rejected email content:** Specify the content of the notification email to be sent to the suggester when a suggestion is rejected. Click the **Assistance** button in the field and select an article from the Select Article window.
- **Feedback request email content:** Specify the content of the notification email to be sent to the suggester when a suggestion is sent back with feedback. Click the **Assistance** button in the field and select an article from the Select Article window.



Select the notification type and configure the notification messages

5. Click the **Save** button.

Deleting Approval Processes

Important: **If there are any pending articles in an approval process, then it cannot be deleted.**

To delete an approval process:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department*.
2. In the Tree pane toolbar, point to **More** and select **Manage approval processes** button.
3. In the Manage Approval Processes window, select an approval process.
4. Click the **Delete** ☒ button.
5. A message appears asking to confirm the deletion. Click **Yes** to delete the approval process.

Working on Suggestions

Once an article is suggested by an agent, a notification is sent to the approvers if the notification process has been set up. You can view the suggested articles at two places in the KB Console:

- You can view them in the **All Suggestions** folder in the **Lists** folder. In this folder, you can only view the articles on which you have the permission to approve. For example, let us say an agent submits two suggestions in two different folders, and you are a designated approver for only one folder, then you will see only one article submitted for approval.
- You can also view the suggested articles in the folders in which they are suggested. Here you can also view the articles on which you do not have approval permissions, but, you can work only on those articles on which you have approval permissions.

After reviewing the contents of the suggestions, you can take one of the following three actions.

- You can approve the article. If you are the last approver in the approval process, the article becomes a part of the Knowledge Base and can be made available to agents. Before approving the article, you can make changes to the article. If there are other approvers after you, then the article is made available to them for approval.
- You can reject the article. If you find that the suggested article is not appropriate to be added in the Knowledge Base, you can reject the suggestion. Before rejecting a suggestion, it is a good practice to add a note to it to let the suggester know why the suggestion is being rejected. If there are two levels of approvers in the approval process and you are at the first level and you reject the article, the article is not made available for approval to the next level of approvers. Once an article is rejected, it is no longer visible in the KB folders; however you can search for these articles from the Search window.
- You can send back the article with feedback. If you find that the suggested article needs some improvements or is not complete, you can send it back to the suggester to modify the article. Before sending back a suggestion, it is always a good practice to add a note to it to let the suggester know what all changes he needs to make to the suggestion. Once an article is sent back with feedback, it is no longer visible in the KB folders; however you can search for these articles from the Search window.

To review a suggestion:

1. In the Tree pane, browse to **Knowledge Base > Lists > All Suggestions.**

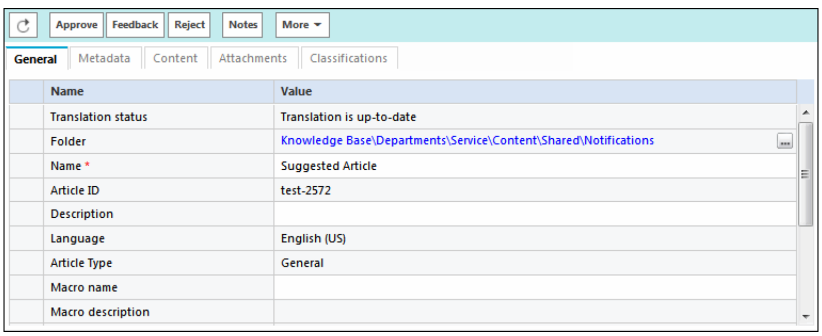
   In the List pane you can view all the articles which are waiting to be approved.

2. In the List pane, select the article you want to work on.

3. In the Properties pane you can view the various properties of the suggestion. If you want, you can make changes to the article. You can also change the priority of the article. After reviewing the article, you can decide if you want to accept the suggestion, reject it, or you want more information on the suggested article.

   Based on your decision, click one of the following buttons in the Properties pane toolbar.

   - Click the **Accept** button to accept the suggestion. After you have accepted the article, it is added to the KB. But if in the approval process, there is another level of approval after you, then the article is made available for approval to approvers at that level.
   - Click the **Reject** button to reject the suggestion.
   - Click the **Feedback** button to send the article back to the suggester. Before sending the article back with feedback, add a note to the article. The note is a way of communicating to the suggester what changes they need to make to the article. To learn more about adding notes, see the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager's Guide*.



Review the suggested article

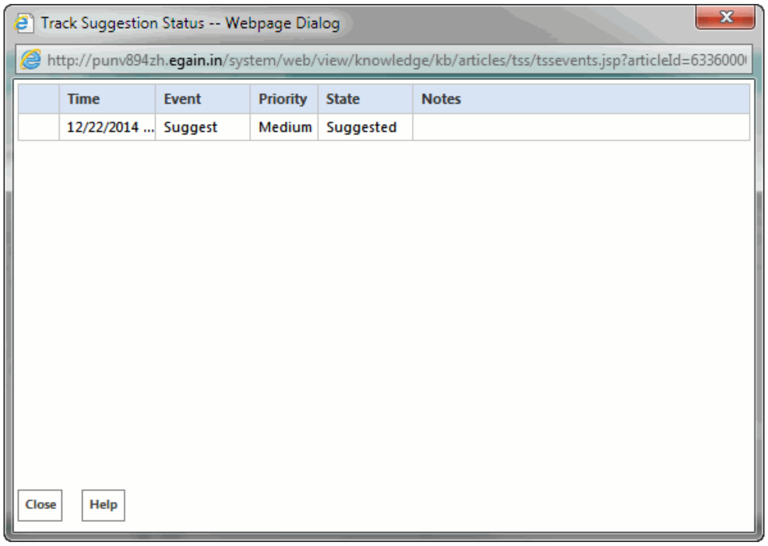
Tracking the Status of Suggestions

You can track the status of the suggestions which have been approved and also the suggestions which are still in the approval process. This helps you keep track of the articles as they go through the approval process.

To track the status of a suggestion:

1. Select the article for which you want to track the status.
2. In the Properties pane toolbar, click the **Track suggestion status** button.
3. In the Track Suggestion Status window, view the audit trail of events associated with the suggestion. The following details are shown.
   - Time
   - Event
   - Priority

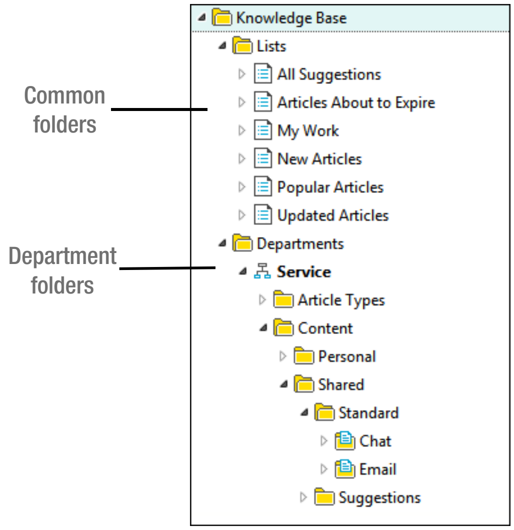
- State
- Notes



Track the status of a suggested article

8 Useful Articles Lists

The folder structure in the KB Console is designed to help you use the console efficiently. Special “List” folders are provided to enable quick access to certain types of articles.



Folders in the KB Console tree

About Useful Articles Lists

The **Lists** folder in the Knowledge Base (KB) Console contains folders to provide shortcuts to various types of useful articles. This folder cannot be renamed. It contains six predefined folders. You can add more folders.

The default **Lists** folders provided in the system are the following.

- All suggestions
- Articles about to expire
- My Work
- New articles
- Popular articles
- Updated articles

Articles About to Expire

This folder contains a list of articles which are about to expire. Through the **Time to expire in days** setting, from the Administration Console, the partition administrator can specify the number of days prior to expiry, when the article should be visible in this folder. When an article meets this set time, it appears in the folder.

Popular Articles

This folder contains a list of articles that are used frequently by the KB article users. This list is updated from time to time. Through the settings from the Administration Console, the partition administrator can define the number of articles to show in the folder, the time interval at which this list should be updated, and the number of days during which the article usage is evaluated to arrive at the most popular article list. The three settings are:

- Popular articles display count
- Popular articles update interval in hours
- Popular articles evaluation period in days

New Articles

This folder displays a list of articles that have been recently added to the KB. It displays the new articles added during a certain time period, for example, the new articles added during the last five days. The evaluation time period is determined by the **Recently added articles evaluation period in hours** setting at the partition level.

Updated Articles

This folder contains a list of articles that have been modified recently. It has articles modified during a certain time period, for example, articles modified during the last five days. The evaluation time period is determined by the **Recently changed articles evaluation period in hours** setting at the partition level.

My Work

This folder lists all the articles that are assigned to you (or a group of users) by the knowledge workflows. You need to work on these articles to move them to the next stage in the workflow. Here, you can view the current stage of the workflow in which the article resides, as well as its progression within the workflow. If the content of the article is not satisfactory, you can send the article back to a previous stage for edits. The My Work list does not display the articles that are sent back to Draft stage.

All Suggestions

Through the Agent Console users can suggest articles or responses to be included in the KB. This folder contains a list of such articles suggested by users. Authors can approve or reject these suggestions.

Creating Useful Articles Lists

You can create useful articles lists, if you have permissions to perform the following actions:

- Create useful items folder
- Edit useful items folder

Useful articles lists can be created in one of the following ways:

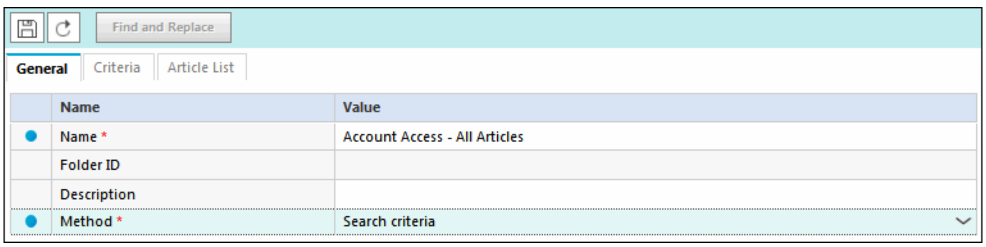
- Dynamically, by searching for articles
- Manually, by selecting articles

Creating Useful Articles Lists Dynamically Through Search

To create a useful articles list dynamically through search:

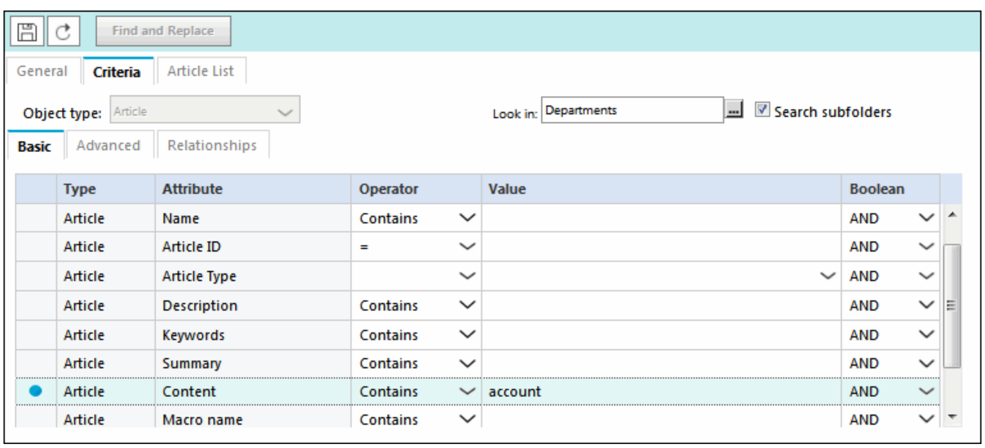
1. In the Tree pane, browse to **Knowledge Base > Lists.**
2. In the List pane toolbar, click the **New folder** button.
3. In the Properties pane, go to the General tab and provide the following details:
   - **Name:** Type the name of the folder.
   - **Description:** Type a brief description.
   - **Method:** Select the method as **Search criteria.**

> Important: **The Criteria and Article List tabs are enabled only after you select a method in the General tab.**



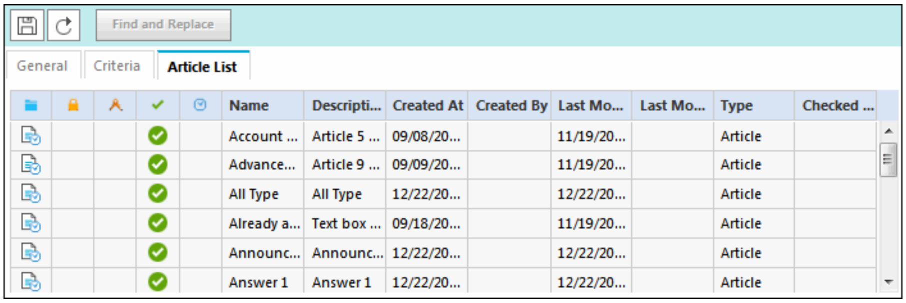
Set the general properties

4. Next, go to the **Criteria** tab, and specify the search criteria. You can search for articles using basic and advanced searches. For details on search, see "Search for Information" on page 21.



Set the criteria for search

5. Lastly, go the Article List tab. Here, you can view the list of articles that meet the search criteria specified in the Criteria tab.



View the list of selected articles

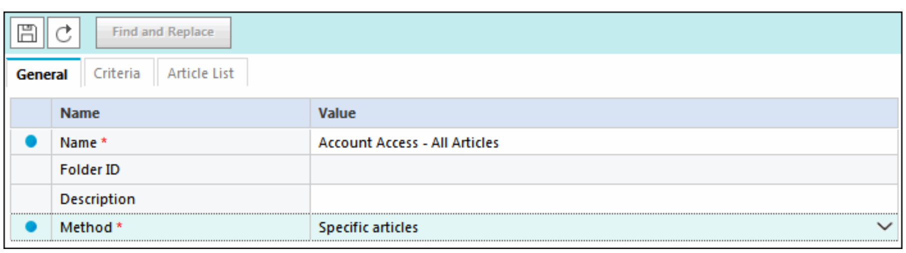
6. Click the **Save** button.

Creating Useful Articles Lists by Selecting Articles

To create a useful articles list by selecting articles:

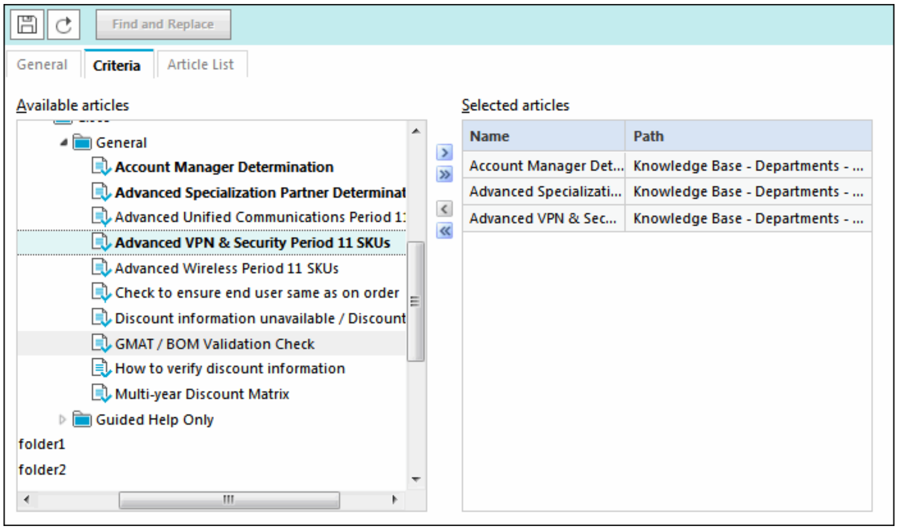
1. In the Tree pane, browse to **Knowledge Base > Lists.**
2. In the List pane toolbar, click the **New folder** button.
3. In the Properties pane, go to the General tab and provide the following details:
   - **Name:** Type the name of the folder.
   - **Description:** Type a brief description.
   - **Method:** Select the method as **Specific articles.**

Important: **The Criteria and Article List tabs is enabled only after you select a method in the General tab.**



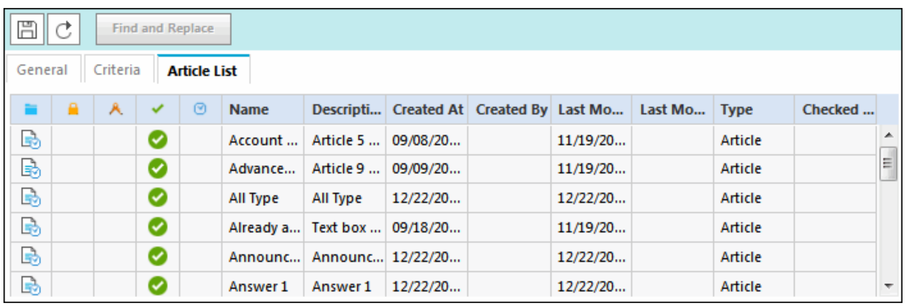
Set the general properties

4. Next, go to the Criteria tab and select the articles you want to add in this list. Use the **Move Up** and **Move Down** button to change the order of the articles.



Select the articles

5. Lastly, go to the Article List tab. Here, you can view the list of articles selected in the Criteria tab.



View the list of selected articles

6. Click the **Save** button.

Deleting Useful Articles Lists

You can delete an article list only if the **Delete useful items folder** action is assigned to you.

To delete a useful article list:

1. In the Tree pane, browse to **Knowledge Base > Lists >** *List Name*
2. Select the list in the Tree or List pane.

3. Click the **Delete** button.

Important: **The Delete button is enabled only if you have the action assigned to delete the list folders.**

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9 Multilingual Content

The KB can hold content in multiple languages. This chapter is for managers and authors who need to use the KB in more than one language. It describes the guidelines for designing and implementing multilingual contents, and procedures for importing and exporting translated content.

Planning a Multilingual KB

Through its design of the knowledge base, Unified EIM and WIM provides support for designing and building the knowledge base in one language, and translating the content into one or more additional languages. The initial content is created and added in a single language. Additional languages are supported through translation, reducing complexity and overhead that would otherwise be incurred by authoring the knowledge base in every required language. This allows sharing of data within the knowledge base amongst all supported languages. It also allows for mechanical (non-textual) changes to be made once within the knowledge base (such as a change in attribute, addition of some condition, etc.), without requiring that each of these changes is made to each and every translated version of the knowledge base item.

However translation is not always required and the knowledge base can be designed to support content that is unique to each language, where data is not shared across languages. This can be supported by separating data specific to each language into separate departments or their own objects within the same department (such as folders) where each component part of the knowledge base is assigned a language identifier as a signature. Each container is maintained and used independently from each other.

The key decision as to which technique is best is whether the data can be shared for all languages. There is support available within the knowledge base where some additional details can be added specific to each supported language.

Primary Language

When Unified EIM and WIM is installed you are prompted for the primary language of the system. This is the language in which content is added into the knowledge base. This becomes the source language if the contents of the knowledge base are to be translated.

During the installation process, some default data in the knowledge base is created and the primary language assignment is used to label the data accordingly.

Ensuring that all authors input content in the primary language is a key element of designing and building a knowledge base for use in multiple languages, especially when it comes to updating information following a translation. This is enforced by creating user accounts for authors, where each user is assigned a default language, thus ensuring that any data input to the knowledge base is automatically labelled with the default language of the author.

Knowledge Bases in Multiple Languages

Knowledge bases can be designed and built in multiple languages, where each knowledge base is a logically independent source of information i.e. there is no sharing of data between these knowledge bases. Each knowledge base needs to be built in a separate department.

When a department is created, you can change the department language. This ensures that any default data and any database services are created appropriately. Within each department, independent teams of authors are created; each author assigned a default language for that department.

Information can be stored in a knowledge base in “mixed” mode, where a single knowledge base contains information in multiple languages. When choosing this approach, it is recommended that articles be stored in separate folders with each folder relevant to a specific language. This makes maintenance easier. Independent authors should be created in order to enforce this, each author specific to a language.

Any author viewing the knowledge base content within the Knowledge Base Console will only see content relevant to their default language.

Any author viewing the knowledge base content within the Knowledge Base Console will only see content relevant to their default language.

Translation

Once information has been created within the knowledge base and it has been tested and proven to work effectively, it can be translated into one or more target languages. This is achieved by extracting the textual information from the knowledge base and presenting it to translators.

This information is exported from the knowledge base in XML format. Most translation companies are familiar with this type of file and can work with the contents to extract the textual parts from within the XML detail, build glossaries on the resulting content, translate the information and then rebuild the XML file, so that its contents can be imported back into the knowledge base. The glossaries are an important part of the process, maintaining context on the information within the knowledge base, so that future translation updates adopt consistent terminology. The XML schema listed in “KB Objects Available for Translation” on page 82 can be passed to the translators. Alternatively, it can be used to provide context for manual translation or for building custom tools to process the file.

Once the translations are imported into the knowledge base, testing can be done to validate the translations and to ensure that the knowledge base is operational in an identical manner to the original primary language version. Any amendments can be passed back to the translators, so that an updated import file can be created, which can then be imported once more to update the translated knowledge base with the required changes.

This process continues until the quality of the knowledge base reaches an agreed standard. All of this requires planning to ensure that sufficient time is allocated to the translation process. Starting this process too early may mean that the knowledge base is still under construction in the primary language. Leaving it too for too late may compromise a project release date if the translation quality is not high enough.

Authoring can still occur on the knowledge base whilst content is being translated or validated. Unified EIM and WIM keeps a log of the major translation activity, saving details such as the timestamp of any request for XML export and the timestamp of any subsequent imports for specific languages. This can then be used to determine the extent of any changes to the knowledge base since the last translation request. The textual changes associated with this delta can then be exported - known as a partial export - and translated without requesting a complete translation of the knowledge base. However any substantial changes to the knowledge base, such as major restructuring or deleting of information, should be reserved until translation activity is complete; to avoid any issues surrounding matching translations to knowledge base objects that no longer exist.

Article Attachments

Attachments to knowledge base articles present an interesting design decision when building the content. Since the content of these attachments will be language specific, by virtue of language or by the content itself, the set of attachments for a translated language will be different to those for the primary language. It is recommended for maintenance purposes that these reside in different folders, so that all attachments in one language are stored in a folder structure independent of another.

For this reason, attachments are outside the scope of translation. It is likely that the information has already been translated and is available in target languages, prior to the knowledge base being translated. If not, plans to translate these attachments and store the results will need to be made.

Support is provided in the translation process to map the correct translated attachment to the translated article, by exposing the attachment name in the XML schema. This way translators or authors can provide the appropriate attachment name for the translation. This may simply be a change of folder location to something specific to the language. When the translated XML file is imported back into knowledge base, the attachment will be loaded into the system.

Important: **This functionality applies to external attachments only. Internal attachments, which have been uploaded into the knowledge base, are out of scope for translation.**

Agent Usage

Translated content is made available to agents in the Agent Console.Here, the contents of the knowledge base are used in agent responses to emails. If the contact center is handling customers from different geographies, it is important that agent responses match the language of incoming messages.

Generally, most agents or users are familiar with one language. Thus, at configuration, agents are assigned a default language that determines the language of the knowledge base displayed to them.

If an agent is bilingual or able to work with content in multiple languages, the agent can be configured with all of their proficient languages. Agents configured with multiple languages can freely switch between each of their assigned knowledge base languages. Their default language determines the language of the knowledge base when the agent first logs into the system.

However, workflows can only be displayed using the default language of the department. Thus, any articles in the scope of a workflow automatically contain the department's primary language, rather than any of the translations.

Modifying Translations

There are two methods of editing translations, dependent on the number and nature of the changes involved.

1. For large numbers of changes, such as a global change or a correction of terminology, it is better to use the latest XML import file by asking the translator to make the changes and return an updated import file. (These changes can be made with a text editor, but care must be exercised not to destroy the XML syntax). These changes can then be imported once again into the knowledge base, which will simply overwrite the existing translations with these updates.

2. A smaller number of changes, such as a correction of specific information or mechanical edits, can be made directly to the application's content. However, be aware that global changes via translation import overrides changes made directly to the content through the application. To perform minor corrections, there are two approaches:

   a. Ask the administrator to create specific authors relevant to each translation language, ensuring that these authors have the relevant permissions to make changes in the areas where content has been translated e.g. KB folder permissions.

   b. Ask the administrator to add additional languages to existing authors who are deemed appropriate to make these corrections (which will ensure that the relevant access permissions are appropriate).

   Authors with the appropriate configuration can then proceed with making their changes to the content in the application.

Reports

The Article Usage by Language report is available in the Reports Console. It shows the usage of KB articles in assisted interactions according to the language of the content in the article.

Reports can be produced for Agent Usage that are language specific. For Agent Usage, a specific report can be generated, which shows the knowledge base usage by language, determining the level of interaction per language.

Getting Started

Making Additional KB Languages Available in Departments

When the application was installed, a primary language is defined for the application. This can be changed at a later date, but is not recommended if knowledge base content has already been defined or if the knowledge base has already been translated.

You can determine the target languages in which the knowledge base needs to be available. These languages can also be added individually at a later date.

To make KB languages available in departments:

1. Log in to the Administration Console as a partition administrator.
2. In the Tree pane, browse to **Administration >** *Partition_Name* **> Settings > Department.**
3. In the List pane, select the Department Settings Group.
4. Next, in the Properties pane, go to the Attributes tab and locate the **KB primary language** setting.
5. In the Value field click the **Assistance** button. From the Select Value window, select the languages from the Add languages section and click **Add**. The languages get added and the selected languages become disabled. The selected languages become available in the **Select primary language** dropdown list. You can change the primary language, if required.
6. Click the **Save** button.

Changing Primary KB Language for Departments

If separate departments are required for each language, these can be created. After creating the department, change the primary KB language of the department.

To change the primary KB language for a department:

1. Log in to Administration console as a department administrator.
2. In the Tree pane, browse to **Administration > Department >** *Department_Name* **> Settings > Department.**
3. In the List pane, select the Department Settings Group.
4. Next, in the Properties pane, go to the Attributes tab and locate the **KB primary language** setting.
5. In the Value field, click the **Assistance** button. In the Select Value window, from the **Select primary language** dropdown list, select the primary KB language for the department.
6. Click the **Save** button.

Changing Default Dictionary for Departments

You also need to change the default dictionary for the department, so that spell-checking functionality is aligned to the primary KB language set for the department. You can change this from the Administration Console, Dictionaries node.

Important: **The application does not have dictionaries for the following languages: Chinese (Simplified), Chinese (Traditional), Czech, Greek, Japanese, Korean, Norwegian (Nynorsk), Portuguese (Brazilian), and Turkish.**

For details on changing the default dictionary, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Important: **The default department dictionary is always pre-defined to English (US). So, if the KB primary language is changed to a different language, either directly in the application or through the installation program, then the default department dictionary will need to be changed if this is required in the knowledge base for spell-checking article content.**

Assigning KB Languages to Users

From the Administration Console, administrators can create user accounts within a department, and for each user, assign a default language and additional languages, as required. By default, each user is assigned a default language matching the department's primary language.

It is good practice for a specific user to be designated the owner of the knowledge base. This user (author) can then create the parent KB folders. This author must be assigned the KB's primary language as their default language. Additionally, this author should be the person responsible for translation management - determining when the knowledge base is ready for translation and controlling the export and import of translations. They also need to be assigned specific user actions which are not default assignments - Import Translation and Export Translation - to the user's account to enable them to perform these tasks.

For details on assigning KB languages and actions to users, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Setting Translation Option for KB Objects

Not all knowledge base content within a department may need to be translated. Some of it may be test data, material for prototypes, or content that is still under design. For this reason, when content ready for translation must be enabled for translation. Each KB folder has a property in the General tab of the object called "Translate content". This attribute is **No** by default and must be set to **Yes** before the content can be translated. For hierarchical structures such as KB folder trees, switching the attribute of the parent object propagates the change to all of the object's child nodes.

For details, see "KB Tree and Folders" on page 26.

KB Objects Available for Translation

Once content has been created within the knowledge base and tested and proven to work effectively, it can be translated into one or more target languages. This is achieved by extracting the textual information from the knowledge base and presenting this to translators. This information is exported from the knowledge base in XML format. After the translation is done, the translated content can be imported back into the knowledge base.

#	Element name	Attribute name	Description	Available for translation
1.	eGainExportKBTranslation	iTargetLanguageId	Target language for translation.	No
2.	egpl_kb_folder	iId	Object ID of the KB folder.	No
		iUUID	Object UUID of the KB folder.	No
		iName	Name of the KB folder.	Yes
		iDescription	Description of the KB folder.	Yes
3.	egpl_kb_article	iUUID	Object UUID of the article.	No
		iArticleReferenceId	Object ID of the article.	No
		iName	Name of the article.	Yes
		iDescription	Description of the article.	Yes
		iKeywords	Keywords of the article.	Yes
		iSummary	Summary of the article.	Yes
		iContent	Content of the article.	Yes
		iContentText	Article content without HTML formatting.	Yes
		iAddtionalInfo	Additional information available for the article.	Yes
		iComment	Comments available for the article.	No
		iAttachmentList	List of attachments for the article.	No
4.	iAttachmentList	iAttachment	List of attachments for the article.	No
5.	iAttachment	iId	ID of the attachment.	No
		iName	Name of the external attachment.	Yes
		iFilePath	Path of the attachment file.	Yes

Objects available in the XML for KB objects

Exporting Content for Translation

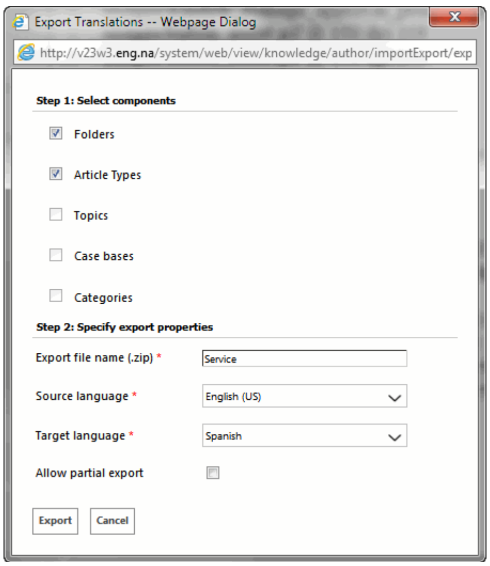
To export content for translation:

1. In the Knowledge Base Console toolbar, from the **Import/Export** multi-button, select the **Export Translations** option.
2. In the Export Translations window, set the following.

a. In the **Step 1: Select components** section, select the KB objects you want translated. Only the objects that are marked for translation are enabled. The objects available are:
   - Folders
   - Article Types

b. In the **Step 2: Specify export properties** section, specify the following:
   - **Export file name (.zip):** Name of the export file.
   - **Source language:** The source language of the content.
   - **Target language:** The target language of the content.
   - **Allow partial export:** Select this option if you want only the updated and new objects to be sent for translation.

c. Click the **Export** button.



Export content for translation

3. In the Export File Download message that appears, click the name of the zip file to save it on your machine. It is good practice to save the translation files in separate folders, with each folder specific to the target translation language and each corresponding sub-folder specific to the date or phase of the project.

   The content can now be sent for translation.

Importing Translated Content

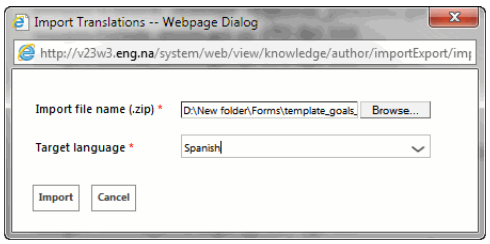
Before starting the import process, check the following:

- The translated files must be saved in UTF-8 character encoding format, and not UNICODE. If the file is saved in UNICODE encoding, the import process will fail. It should also be noted that some of the editors insert additional hidden characters, which can distort the file. In such cases, the import process may fail. Notepad is a safe text editor to open the files as long as the data is subsequently saved in UTF-8 format.
- Save the translated content as a zip file on your local machine.

- Make sure that the name of the zip file matches the name of the XML file; otherwise the import process will fail. For example, if the XML file name is `project_fre.xml`, the zip file should be named `project_fre.zip`.

To import translated content:

1. In the Knowledge Base Console toolbar, from the **Import/Export**  multi-button, select the **Import Translations** option.
2. In the Import Translations window, set the following.
   - **Import file name (.zip):** Click the **Browse** button and browse to the zip file that contains the translated content.
   - **Target language:** From the dropdown list, select the target language for the content.
3. Click the **Import** button. Once the import process is completed, the Import Process Logs message is displayed that tells if the translated content has been imported successfully or not.



Import translated content