



## Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Console User's Guide

For Unified Contact Center Enterprise and Hosted and Unified ICM

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# Preface

- ▶ [About this guide](#)
- ▶ [Document conventions](#)
- ▶ [Other learning resources](#)

Welcome to Cisco® Interaction Manager™, 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 Interaction Manager includes a common platform and one or both of the following applications:

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

## About this guide

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*Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Console User'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).

## Document conventions

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This guide uses the following typographical conventions.

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

*Document conventions*


## Other learning resources

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Various learning tools are available within the product, as well as on the product CD and our web site. You can also request formal end-user or technical training.

### Online help

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

Use	To view
 <b>Help</b> button	Topics in <i>Cisco Unified Web and E-Mail Interaction Manager Help</i> ; 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. It includes the following documents:

- ▶ *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*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administration Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Reports Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Supervision Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager System Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Tools Console User's Guide*

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](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](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](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](http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html)

# 1

## Console basics

- ▶ [About the Knowledge Base](#)
- ▶ [Key terms and concepts](#)
- ▶ [Related actions, roles, and permissions](#)
- ▶ [Elements of the console interface](#)

An authoring console, the Knowledge Base Console is used to build and publish the Knowledge Base (KB), a repository of predefined content for use during interactions with customers. This console is used by:

- ▶ Authors and reviewers to create and manage content by adding, editing, and approving of KB articles.
- ▶ Managers and engineers to publish the articles.

This chapter deals with KB basics. It provides an introduction to important concepts and a quick tour of the console.

## About the Knowledge Base

---

The KB is critical for providing quick, consistent, and effective information to customers at every touchpoint.

### Author once, use everywhere

- ▶ Cut down knowledge creation and maintenance effort by using a centralized repository of knowledge.
- ▶ Reduce service costs by reusing knowledge across all channels.

### Enhance customer experience with high-quality responses

- ▶ Offer consistent and accurate information to your customers across all interaction channels: web chat, email, and phone.
- ▶ Significantly decrease response times with ready-made, easily accessible answers.
- ▶ Set up approval workflows to ensure submissions are reviewed and edited before they are published.

### Improve agent productivity with easy access through Agent Console

- ▶ Empower agents with drag-and-drop access to well-crafted responses of all types: information about products and services, greetings, signatures, quick responses for chat, and more.
- ▶ Reduce training time and cost by helping new agents function like experts.
- ▶ Foster knowledge-sharing by making it easy for agents to contribute to the KB.

### Easily find content with indexed smart search

- ▶ Use the smart indexed text search engine to navigate the KB tree to find an article.
- ▶ Search on partial words (i.e., typing **tim\*** would give timeframe, time period, etc.).
- ▶ Find articles based on advanced attributes such as “creation date,” “expiry date,” etc.
- ▶ Sort search results alphabetically and in ascending or descending order.
- ▶ Export search results to an external file.
- ▶ Save frequent search queries to reuse and execute again.

# Key terms and concepts

---

## Knowledge Base tree

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

1. **Useful Items:** Contains folders to provide shortcuts to various types of useful articles.
2. **Departments:** Includes all KB folders, organized by department.

## Content

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

## Folder

The KB is hierarchically organized into folders and subfolders. If you have required permissions, you can create, modify, rename, delete, copy, and paste folders other than special folders such as the default useful item and standard folders. You can move folders using the drag-and-drop feature. You can print all articles in a folder at once by printing the folder.

## Article

Information is stored in the form of articles 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 agents spends in searching for an apt article. There are three types of bookmarks:

1. Global
2. Queue
3. Personal

## Attachment

Authors can add additional information 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 the suggestions in the KB Console and approve, edit, or reject them.

## 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 *Cisco Unified Web and E-Mail Interaction Manager Administration Console User's Guide*.

## Author role

In this section we list the actions that users who are assigned the Author role are allowed to perform.

Resource	Actions permitted
Knowledge Base Console	View
Agent Console	View
Reports Console	View
User	View
Category	View
Notes	View, Add, Delete
Resolution Codes	View
KB folders	Create, Own, View, Edit, Delete
Article	Create, Edit, Print, Delete, Suggest, Import
Useful items folders	Create, Delete, Edit
Personal Folders	Manage, View
Bookmarks	Manage
Macro	View
Suggestions	Manage

Resource	Actions permitted
Configuration	View, Create, Edit, Delete
Template set	View, Create, Edit, Delete
Topic	View, Create, Edit, Delete, Cut, Copy
Reports	Run, View, Create, Schedule, Delete, Edit
Approval process	Manage

## 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 subfolders.

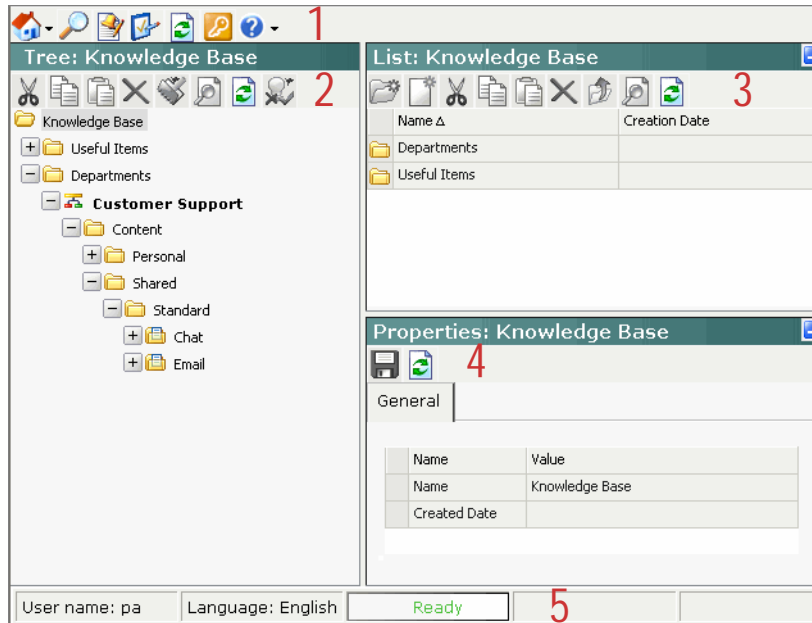
- ▶ In the KB Console, authors can view all content—approved and suggested—in folders they have permissions to view.
- ▶ In the Agent Console, agents can view only approved articles and their own suggestions in the folders they are allowed to view.

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 —subfolders— 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 plus [+] 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, attachments, 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**, etcetera)



# Search for information

- ▶ [Creating searches](#)
- ▶ [Deleting searches](#)
- ▶ [Saving searches](#)
- ▶ [Running saved searches](#)
- ▶ [Stopping searches](#)
- ▶ [Creating a search from saved searches](#)
- ▶ [Locating articles in the console](#)
- ▶ [Exporting search results](#)
- ▶ [Printing search results](#)

Search is a very useful feature in Knowledge Base (KB). Use this feature to locate articles in the KB folders.


You cannot carry out a search on personal folder contents of other users. Only the owner of the folder has the relevant permissions.

## Creating searches


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

### Creating searches

#### To create a search

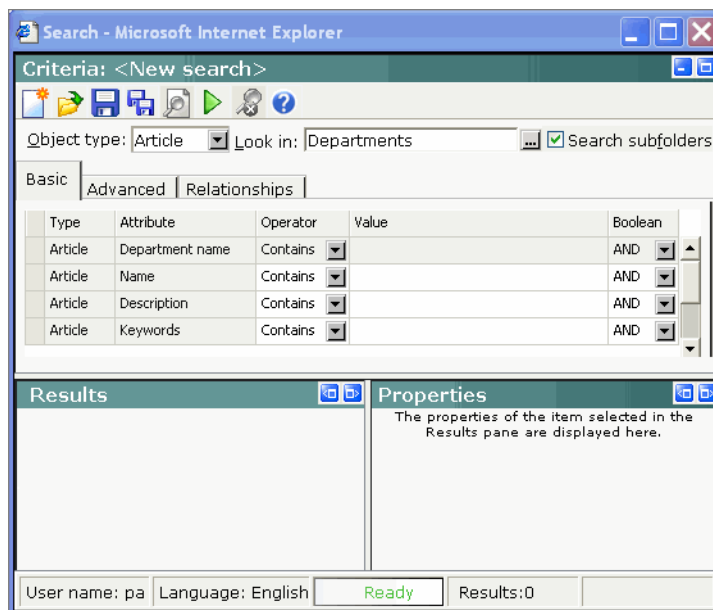
1. In the Knowledge Base Console toolbar, click the **Search**  button.

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 articles.


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 the 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. Now, in the Basic tab specify the search criteria. You can search on attributes such as, name, description, keywords, summary, content, and macro name.
6. Next, go to the Advanced tab and specify additional search criteria options. Advanced search includes attributes such as last modified date, creation date, expiration date, commit state, and author. Advanced search narrows down the scope of search and you get only the most relevant results.
7. Lastly, go to the Relationships tab and defining the criteria that are related to classifications and attachments. This further narrows down the scope of search.
8. Click the **Run**  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 the articles.

## Deleting searches

---

If you want you can delete the searches.

### To delete a search


1. Select the search in the Open Search, or 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 the 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, click the **Open**  button.
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 **Run**  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**  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 personal search or vice versa.

## To create a search from a saved search


1. First, open a saved search.
2. Click the **Save as**  button in the Search window toolbar.  
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:** Select the type of search from the dropdown list. There are two options available.
    - Global Searches: A global search is available to all the 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, click the **Locate in console**  button. 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 search results**  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 Excel format.

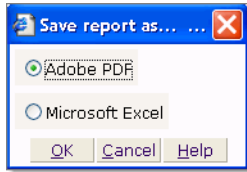
## Printing search results

---

You may want to print search results for using it to circulate important data amongst other members or else in a presentation. With printed search data handy, you do not have to log in to the console to access the same information all the time.

### To print search results

1. After you run the search click the **Print Preview**  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 and click the **OK** button.Search\_Print window appears. It shows the details of all the articles selected for printing.
3. In the Search\_Print 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.



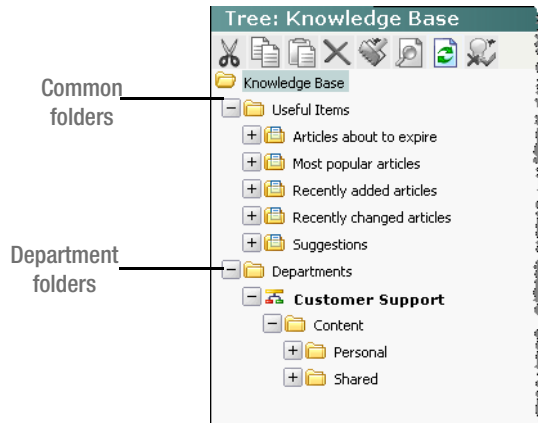
*Select the format for saving search results*

# 3 Content folders

- ▶ [Department folders](#)
- ▶ [Managing folders](#)
- ▶ [Deleting folders](#)
- ▶ [Copying folders](#)

The folder structure in the KB Console is designed to help you use the console efficiently to its fullest strength. To ease out various functions in the console, the system provides you with some default folders. If you have the permissions, you can also create folders and sub-folders in this console.

The default folders in KB Console enable you to categorize KB articles in an appropriate manner. 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.



*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.

### Content

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

### Shared

The shared folder is pre defined, and 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 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

## Personal

When a new user is created in the system, a personal folder for that user is created in the personal folder. Folders in 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 your personal folder.

If a personal folder is made available for public viewing during creation, then other KB users can view it. Knowledge Base (KB) users with 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 cannot be renamed. Sub folders or articles can be created directly under this folder. All articles created under personal folder are directly approved and saved. They do not go through the suggestion and approval process.

## Managing folders

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

### Creating folders

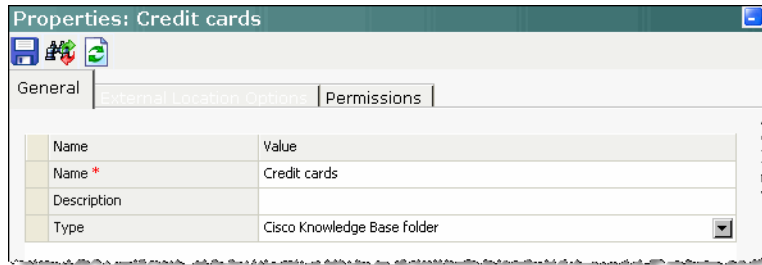
You can create folders and subfolders to organize articles. Remember that you require the necessary permissions to create and modify folders.

#### 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.
  - **Description:** Type a brief description.
  - **Type:** Select the type as **Cisco Knowledge Base folder**.



Type general properties on 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 on permissions see “Assigning permissions on folders” on page 25.

## Assigning permissions on folders

After you have created the KB folders, you can give permissions to users and user groups on them. You can give the following permissions.

- ▶ 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 View folder permission is removed all the permissions get removed automatically.
- ▶ Edit folder
- ▶ Delete folder
- ▶ Create folder: When you give Create folder permission, the Create article permission is assigned automatically.
- ▶ Create article: Create article permission is given automatically when you give Create folder permission.
- ▶ Edit article
- ▶ Delete article
- ▶ Suggest article




**Important:** Permissions can be given only to the users and user groups who have 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

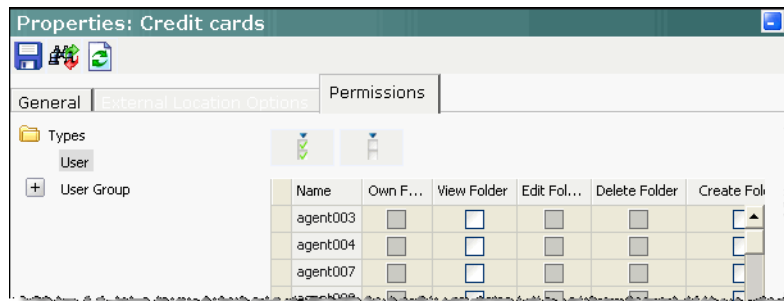
1. In the Tree pane browse to, **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the folder on which you want to assign permissions.

3. In the Properties pane, go to the Permissions tab and assign permissions to the users and user groups on the folder.

You can assign permissions in two ways:

- Assign the 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 all the users view permission on all the folders, instead of giving view permission to each user individually, you can select the permission, and use the **Select all** button to give 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 the users, then the permissions options against their name appear disabled.



*Set up access to the 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 subfolders get deleted automatically.



**Important:** When you delete a folder all its sub folders and content are 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 delete permission on the folder. If you are deleting multiple folders, and you do not have delete permissions on all of them, only those folders on which you have delete permission get deleted. You are notified about the folders that have not been deleted.

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## Copying folders

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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.

### To create copies of a folder

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the folder for which you want to create copies.
3. If you want to move the folder from one folder to another, use the **Cut**  button to remove the folder from the folder in which it exist and go to the folder in which you want to add it, and click the **Paste**  button in the List pane toolbar.
4. If you simply want to create a copy of the 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 gets copied, check the permissions assigned to the users on the folder, and if required, edit the properties of the newly created folder.



# Article content

- ▶ [Creating articles](#)
- ▶ [Deleting articles](#)
- ▶ [Updating articles](#)
- ▶ [Classifications](#)
- ▶ [Working with notes](#)
- ▶ [Viewing versions](#)
- ▶ [Creating copies of articles](#)

Articles are the basic form of content or information. They are organized in a manner that can be used in composing responses in the application.



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**Important:** Except for the articles created in the Personal folders, all other KB articles can be edited only from the KB Console.

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There are various types of articles that can be created. They are:

- ▶ Personal articles: Agents can create articles for their personal reference.
- ▶ Standard articles: For the email channel the headers, footers, signatures, and greetings. For chat channel the quick links and quick responses.
  - Quick Responses: Quick responses are frequently used messages that can be easily used by agents in chat sessions. Agents can use these standard responses in the chat, instead of remembering and typing them each time. For example, *Welcome* can be a quick response that corresponds to the standard welcome message used across all departments and by all agents. The text of this quick response can be *Thank you for contacting the Customer Care center. How may I assist you today?* Instead of typing the whole welcome message repeatedly, the agent can use the quick response. And if you create a macro for it, it can become even more useful. The agent doesn't have to use the **Quick Responses** button again and again, and can just type the macro. This will reduce the number of clicks and retyping of the same message repeatedly.
  - Quick Links: Quick links are frequently used web page URLs that can be easily used by agents in chat sessions. Agents can use these standard web pages in the chat Reply pane, instead of remembering and typing them each time. For example, *Yahoo Finance* can be a quick link that points to the URL <http://finance.yahoo.com/>.

It is important to note that the list of quick responses and quick links have to be mapped to a queue from the Media tab from the Administration Console. Only the quick responses and quick links that are mapped to a queue, appear in the dropdown list in the Reply pane to the agent for quick access. All the quick responses and quick links to which the agent has permission appear in the Knowledge Base section of the Information pane, irrespective of the list of quick responses and quick links mapped to the queue from the Media tab. So, if a specific quick response is not part of the list of quick responses mapped to a queue from the Media tab but if the agent has permission to view it, such a quick response will not appear in the dropdown list. However, the agent can always access it from the Knowledge Base section of the Information pane.

## Creating articles

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You can create articles from the Knowledge Base (KB) Console. Based on the licenses that you have, you can use the same articles in multiple channels. It makes it easy for you to create centralized knowledge, and update and maintain it easily. This also ensures that you provide the same information through all the channels.

Agents can create articles from the Agent Console and can submit them as suggestions. The submitted articles have to be reviewed and approved by the authors from the KB Console. The approved articles can then be made available to the agents for use.

## Creating content

As a KB user, you can create a wide gamut of KB articles that would be used by agents to respond to activities. The articles that you create should be concise and clear.


In this section we will see the various options available for creating the content of the article.

You can create two types of article:

1. **HTML articles:** In the HTML articles you can use the various text formatting, and other options like, numbering, bullets, alignment, adding pictures, and links to web pages etc.
2. **Plain text articles:** In the plain text articles you can add only text. You cannot add any images, hyperlinks, colored text etc.

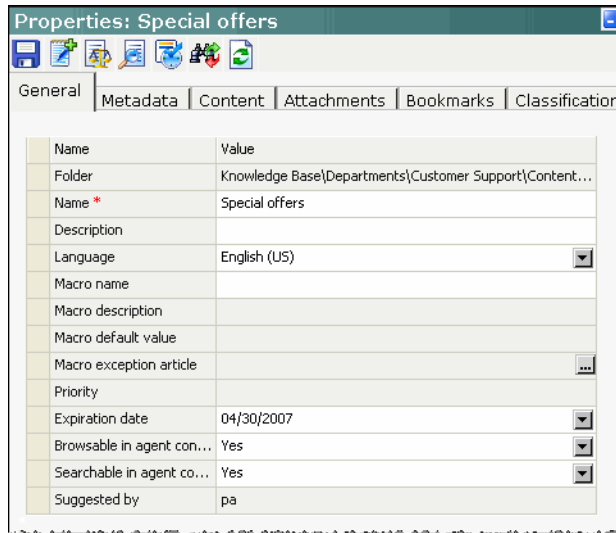
You can change the type of the article, even after creating the content of the article. It is important to note that if you change the type from HTML to plain, all the formatting of the content is lost, and the content appears as plain text.

### To create an article

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 article.
3. In the List pane toolbar, click the **New article**  button.


The Properties pane refreshes to show the attributes of the new article.

4. In the Properties pane, go to the General tab and provide the following details.
  - **Folder:** It displays the path of the folder in which you are creating the article. The value of the field is generated automatically, and it cannot be changed.
  - **Name:** Type a name of the article. This is required information.
  - **Description:** Type a brief description.
  - **Language:** From the dropdown list, select a language.
  - **Expiration Date:** Select an expiration date for the article. If you want that the article you are creating should become unavailable to the users on a particular date, you can give an expiration date for the article. The article is automatically withdrawn on the given date. For example, you are creating an article about a special offer being given to the customers for a period of one month, and you want that the article should be withdrawn on a particular date, you can give an expiration date for the article.
  - **Browsable in agent console:** You can specify if the agent should be allowed to view the article in the Agent Console. By default **Yes** is selected. Select **No** if you don't want to expose the article to the agents. You can use this option when you are still working on an article and don't want the agents to view it, or when you want to make changes in the article and don't want the agents to view it till it is updated.
  - **Searchable in agent console:** You can specify if the agent should be allowed to search the article in the Agent Console. By default **Yes** is selected. If you select **No**, the agents won't be able to search the article. You can use this option when you are still working on an article and don't want the agents to view it, or when you want to make changes in the article and don't want the agents to view it till it is updated.
  - **Suggested By:** Shows the name of the user who is creating the article.



*Set the general properties*

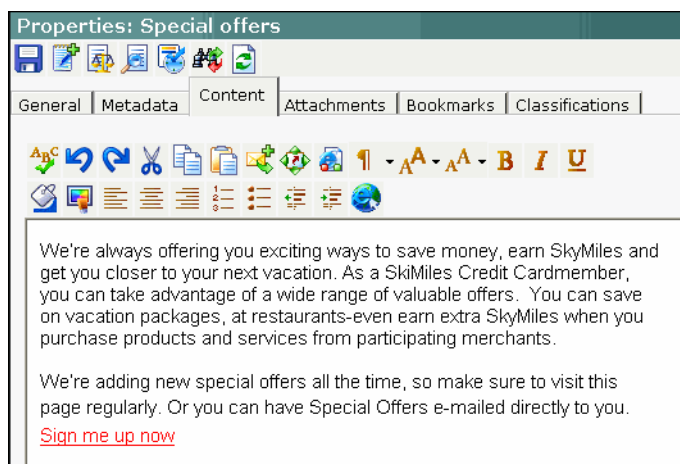
5. Now, go to the Content tab. Here we create the content of the article.

- a. First, select the type of article you want to create. In the Text box toolbar, click the **HTML Plain**  button, to select the article type. By default HTML is selected. When you change the type from HTML to plain, any formatting done in the current content is lost.


In the List pane you can identify the plain text and HTML articles by looking at the article image. (add image).

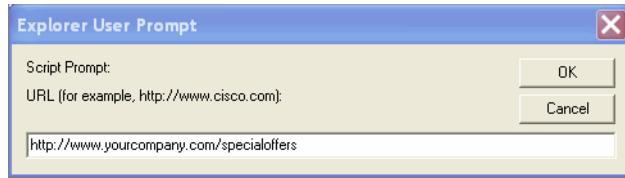
- b. Next, type the content of the article in the text box. Here you can use the various formatting tools available to format your article content. You can also add hyperlinks to the HTML type of articles.

When you are creating the quick responses and quick links it is important to note that when the agent uses the quick response and quick links in the chat, the content is displayed in plain text. In other words, the content of the quick responses and quick links will be displayed in the same font style and attributes as are the other messages that the agent types in. So it is recommended that you don't spend time formatting the text of these articles.




*Create the content of the article*

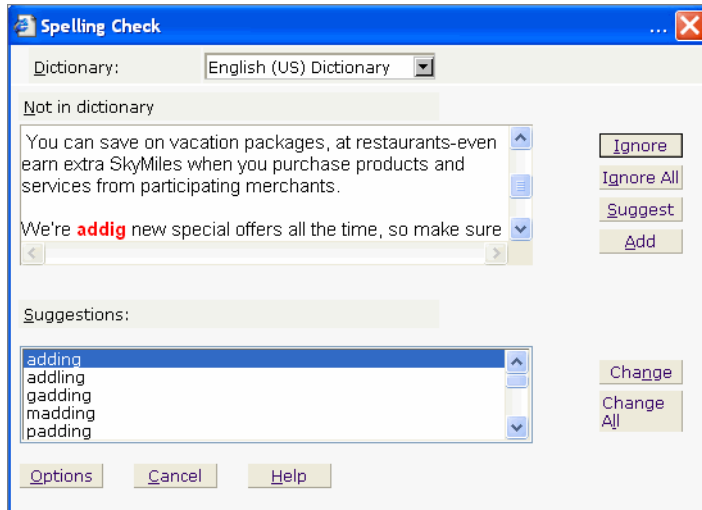
- c. To add hyperlinks to the article content, click the **Insert Hyperlink**  button in the Text box toolbar and in the Explorer User Prompt window, type the hyperlink you want to add.





*Type the web address*

After creating the content, you can run a spell-checker on the content.

- d. To run the spell checker, in the Text box toolbar, click the **Spell Check**  button. Spelling Check window appears. The Not in dictionary section shows the mis-spelled words in red and the Suggestions section shows the suggested words for them. You can either ignore the suggestion or you can change the mis-spelled word to the suggested word. You can also suggest the word to be added to the dictionary by using the **Suggest** button. You can also add a word to your personal dictionary by clicking the **Add** button.




*Run the spell checker*

- e. Lastly, before saving the article you can preview it to see if it appears as you want it to. In the Properties pane toolbar, click the **Preview article**  button. The Preview Article window appears. Here you can preview the content and attachments of the article.
6. In the Metadata tab, specify the metadata for the article. For details, see “Metadata” on page 45.
  7. In the Attachments tab, attach external and internal attachments to the article. For details, see “Attachments” on page 40.
  8. In the Bookmarks tab, bookmark the article for queues or globally. For details, see “Bookmarks” on page 50.
  9. In the Classifications tab, assign categories and resolution codes to the article. For details, see “Classifications” on page 35.
  10. Click the **Save**  button.

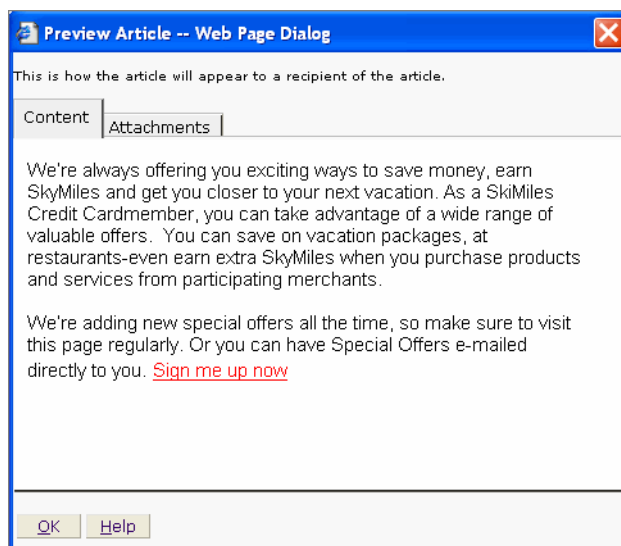
## Previewing content

After creating your article, you can preview it to see how it will appear to the end user. This lets you see if the article appears as you intend it to. You can preview the content and attachments of the article.

### To preview an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Go to a sub folder and select an article in the List pane.
3. In the Properties pane toolbar, click the **Preview article**  button. Preview Article window appears. Here you can preview the content and attachments of the article.

If you have used any macros in the article, and have not expanded them in the article, they appear expanded in the preview window so that you can preview its content as well.



*Preview the article*

## Deleting articles

You can delete articles from a folder only if you have the permission to delete articles. Articles, except the ones in personal folder, can be deleted only from the KB Console. The owner of a personal folder can delete the articles within it, from the Agent Console.


An article cannot be deleted if:

- ▶ It is used as a macro in another article, and the macro has not been expanded.
- ▶ It is used in Media tab in the queue.



**Important:** When you delete an article, all its previously stored versions also get deleted.

## To delete an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Go to a sub folder and select the article you want to delete. You can select multiple articles.
3. In the List pane toolbar, click the **Delete**  button.



**Important:** The Delete button is enabled only if you have delete permission on the article.

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## Updating articles

You can modify or update articles globally. This is especially useful if there are terms such as company name, name of personnel, and other specifications that have to be updated across all or selective articles.




**Important:** You can update the content, summary, and keywords of the article.

---

## To update articles

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Either select a single article or a folder in which you want to update the content.

When you select a folder all the articles in the folder and its sub folder get selected.

3. In the Properties pane toolbar, click the **Find and replace**  button.
4. In the Find and Replace window provide the following details.
  - **Find what:** Type the word or phrase you want to find.
  - **Replace with:** Type the word or phrase with which you want to replace the existing content.
  - Specify the scope of search. Choose from one of the options:
    - Current article: Finds and replaces the term only in the currently selected article.
    - All articles in current folder: Finds and replaces the term in the folder, in which the article is selected.
    - All articles at and below current folder: Finds and replaces the term in the folder in which the article is selected, and all its subfolders.
    - All articles in all folders: Finds and replaces the term in all articles in the KB.
  - **Match case:** Select this option if you want the search to be case sensitive.

For example, if you select the match case option, and the word you give in the Find what field is in upper case, then it will find only words in upper case and ignore the words in lower case.
  - **Find whole word only:** The search will look for the exact word as specified in the **Find what** field.

For example, you want to replace the word *invest* in an article, and the article contains words *invest*, *investment*, *investing* and *invested*. If you select this option, it will replace only the word *invest*. But if

you don't select this option it will replace the word *invest* in all the words like *investing, invested, investment*.

- **Unattended replace:** This option is enabled only when the scope of search is more than one article.

If, in the Find where options you have selected Current article, then this option is disabled. It replaces all instances of the term without asking for replacement of every occurrence. You should select this option only when you are very sure of what you are doing.

After specifying the parameters of your search, select what you want to do. The following options are available.

- **Find Next:** Finds the next occurrence.
- **Replace:** Replaces the selected term.
- **Replace All:** This option is available only when you are editing text in a single article, or you have selected the unattended replace option. It replaces all the occurrences of the searched word and in the end tells you the number of words that have been replaced.



*Find and replace text*

## Classifications

Classifications are used by the system to efficiently organize all the articles according to any specific feature. When such articles are used in activities and responses, they too get classified in the same group. The system provides you with two classification tools, categories and resolution codes.

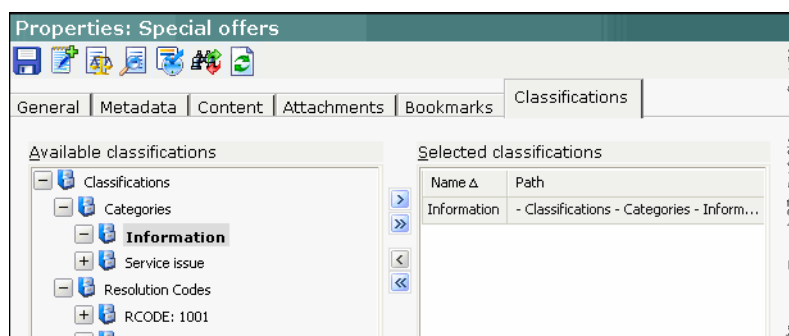
### Classifying articles

Articles are classified based on some common parameters, to enable efficient and organized format. When an article is used in a response, the classifications associated with that article are used to categorize the activity. Classifications are useful especially for reporting. They also help in searching articles.

#### To classify an article

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

2. Go to a sub folder and select an article.
3. In the Properties pane, go to the Classifications tab and select the resolution codes and categories you want to assign to the article. Whenever this article is used in a response for an activity, the activity inherits the classification of the article.



*Assign categories and resolution codes*


4. Click the **Save**  button.

## Working with notes

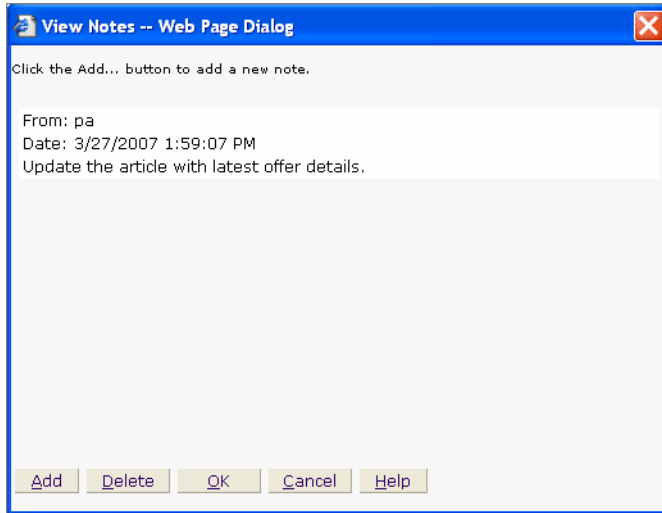
Notes can be added to articles for internal usage. Use notes to convey specific comments, share tips, and information with co-authors. Notes play a very important part in the approval process. You can use them to convey any special comments to approvers of next level and also while sending back the articles to the agent for modifications. More more details on the approval process see (add chapter cross-ref)

### Adding notes

#### To add a note

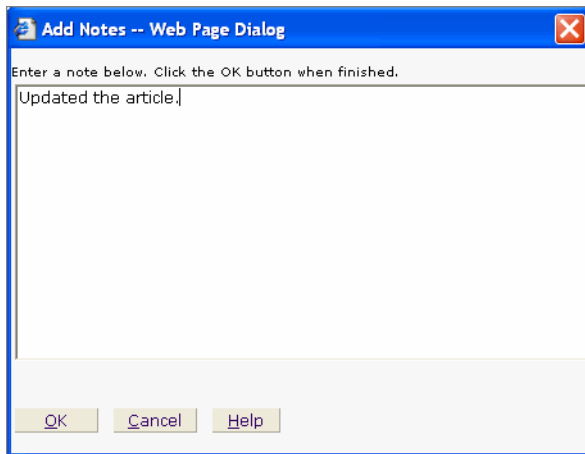
1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the article to which you want to add a note.
3. In the Properties pane toolbar, click the **Notes**  button.

The View Notes window appears. This displays previous notes, if any.



*Existing notes, if any, are displayed in the View Notes window*

4. Click the **Add** button, to add a new note. Add Notes window appears. In the window, type the content of the note and click the OK button.




*Add a note*


5. Click the **OK** button to close the View Notes window.

## Deleting notes

### To delete a note

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the article from which you want to delete a note.
3. In the Properties pane toolbar, click the **Notes**  button.

The View Notes window appears. This displays previous notes, if any.


4. In the View Notes window, select the note you want to delete and click the **Delete**  button.

5. Click the **OK** button to close the View Notes window.

## Viewing versions

Every time you change the content or attachments of the article, a new version of the article is created. Versions help you keep track of the changes you make to an article. The version details of an article can be accessed only from the KB Console. When an article is deleted all its versions get deleted automatically.

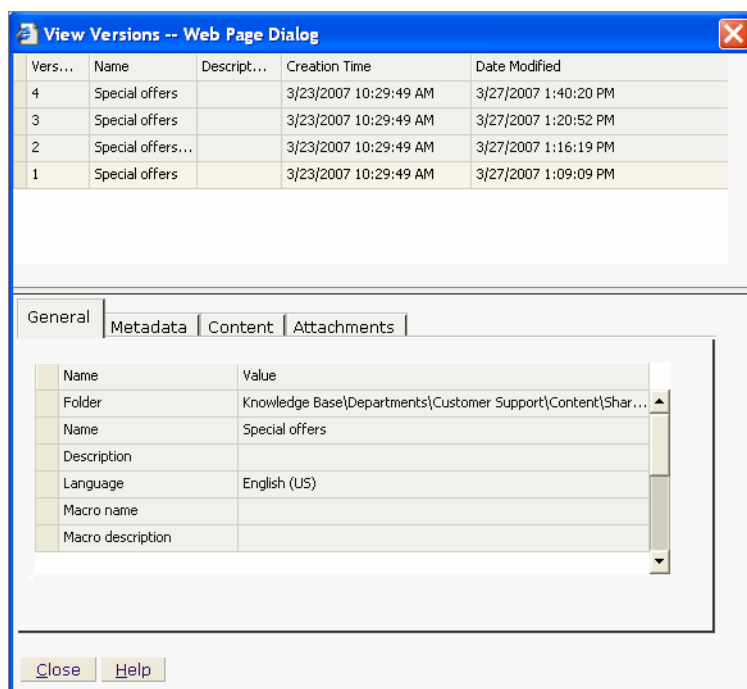
### To view versions of an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the article for which you want to view the versions.
3. In the Properties pane toolbar, click the **View versions**  button.

The View Versions window appears. Here you can see all the previous versions of the article, listed in descending order. You can view the general properties, metadata, content, and attachments of the previous versions.



**Important:** As quick responses and quick links don't have attachments, the attachments tab will not be available for them.



*View older versions of an article*

# Creating copies of articles

---





You can easily create copies of articles or move them among different KB folders. You can either remove an article from one folder and move it to another or you can simply create a copy of the article in another folder. This comes handy when two articles have nearly similar content and you copy it over and edit the copy to make the needed changes. Or, if you create an article in one folder and at a later time decide to move it to another folder.

When you cut paste an article all the properties on the article are copied over. But when you copy paste an article, the four macros fields in the General tab don't get copied over.

You can copy articles from personal to shared folders and vice versa. To move around or copy article among folders you need to have proper permissions on the folders. They are:

- ▶ To copy articles from a folder you need to have View folders permission on that folder.
- ▶ To cut articles from a folder you need to have Delete articles permission on that folder.
- ▶ To paste articles in a folder you need to have Create articles permission on that folder.

## To create copies of an article

1. In the Tree pane, browse to **Knowledge Base> Departments> *Your Department* > Content**.
2. Select the article for which you want to create copies.
3. If you want to move the article from one folder to another, use the **Cut**  button to remove the article from the folder in which it exist and go to the folder in which you want to add it, and click the **Paste**  button in the List pane toolbar.
4. If you simply want to create a copy of the existing article, use the **Copy**  button to copy the article and go to the folder in which you want to add it and click the **Paste**  button in the List pane toolbar.

Edit the properties of the newly created article.



# Attachments

- ▶ [About attachments](#)
- ▶ [Working with internal attachments](#)
- ▶ [Working with external attachments](#)
- ▶ [Deleting attachments](#)
- ▶ [Previewing attachments](#)

# About attachments

Attachments enable you to use existing documents in the KB. You can attach documents in either of the following ways:

- ▶ **As an internal attachment:** When you attach a file as an internal attachment, a local copy of the file is created on the system server and is used in the article. Use this option when the content of the attachment is not going to change at all, and you are not interested in any changes to original content.
- ▶ **As an external attachment:** When you attach files as external attachments you can use the latest versions of the files as attachments to articles. This is useful when the files keep changing periodically and you always want the users to see the latest version of the file.



---

**Important:** While there is no limit on the size of attachments, it is a good practice to avoid very large attachments.

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## Working with internal attachments

You can add a file from your PC or part of the network, as an internal attachment. Such an attachment is stored in the system. It is important to note that:

- ▶ The attachment content cannot be modified. It can only be viewed.
- ▶ More than one file can be added as an internal attachment.

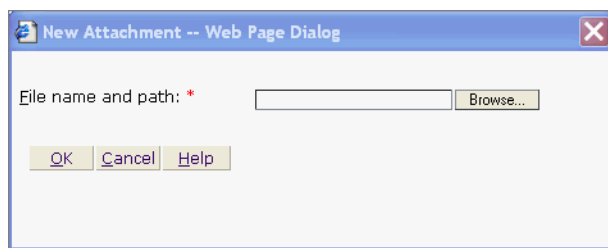
## Attaching internal files

### To attach a file to an article


1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. In the List pane, select an article.
3. In the Properties pane, go the Attachments tab.
4. In the Internal section, click the **New**  button.

New Attachment window appears.

5. In the New Attachment window, click the **Browse** button to browse to the file you want to attach.



*Create an internal attachment*

6. After browsing to the file, click the **OK** button to attach the file.
7. Click the **Save**  button.

*Specify the file to attach*

## Working with external attachments

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You can add a file to the article as an external attachment. When an article is saved, the content of each attachment is obtained and stored locally.

### Setting up access to the source


#### To set up access to the source

1. First, share the folder from which you want to attach external attachments.
2. After you have shared it, test it by accessing it from your machine. To do that, go to, **Start > Run** and in the **Open** field provide the location of the folder with the complete machine name and click **OK**.

It should open the file which you want to attach as external attachment.

### Attaching external files

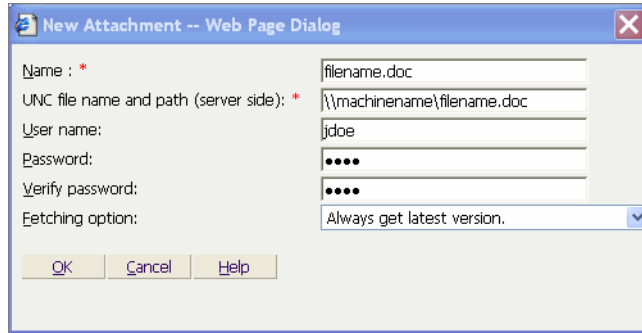
#### To attach an external file to an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select an article in the List pane.
3. In the Properties pane, go the Attachments tab.
4. Go to the External section, click the **New**  button.

New Attachment window appears.

5. In the New Attachment window, provide the following details.
  - **Name:** Provide the complete name of the file with the file extension.
  - **UNC file name and path:** Provide the complete path of the file with the complete file name and extension.
  - **User name:** Provide the user name, with the domain name.
  - **Password:** Provide the password.
  - **Verify password:** Verify the password.
  - **Fetching option:** Select the fetching option. The following options are available.
    - Get latest version, use local copy on failure: The system will try to get the latest version of the file. If it is unable to do so, it will use the local copy of the file. A local copy is made when you first attach a file to an article.

- Always get latest version: The system gets the latest file from the external location every time the article is used.
- Local Copy: The local copy, which is created when you first attach a file to an article, is always used. Changes made in the original file after the attachment was created are not reflected in the attachment.





Create an external attachment

6. Click the **OK** button to attach the file.

## Deleting attachments

---

### To delete an attachment

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select an article in the List pane.
3. In the Properties pane, go the Attachments tab.
4. Go to the Internal or External section and select the attachment you want to delete.
5. Click the **Delete**  button.
6. Click the **Save**  button.

## Previewing attachments


---

### To preview an attachment

1. In the Tree pane, browse to **Knowledge Base> Departments> *Your Department* > Content**.
2. Select an article in the List pane.
3. In the Properties pane, go the Attachments tab.
4. Next go to the Internal or External section. If the article has any attachments, they are listed here.



*Select an attachment*

5. To view the content of the attachment, select an attachment and click the **View**  button.

The attachments opens, and you can view its content. You cannot make any changes to the content of the attachment.

# 6 Metadata

- ▶ [Adding metadata](#)

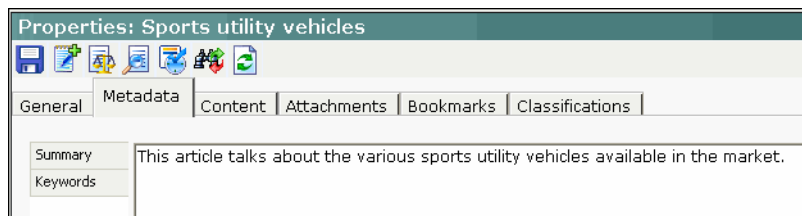
# Adding metadata

Metadata can be added to articles to make the search of the articles more efficient. You can add two types of metadata.

- ▶ **Keywords:** Keywords are unique words of the article content. Words entered during a search are matched against the keywords specified in the metadata for quicker and accurate results. For example, While searching for a sports utility vehicle, different users can enter a different set of words. For example, SVU, Sports utility van, 4WD, Four wheel drive, 4 wheel drive etc. Now if you want that, irrespective of what phrase the user uses for search, a particular article on sports utility vehicles should be shown to him. To make this possible you can add all these words as the keywords for that article. It is important that, you add keywords that are relevant to the article, otherwise the user will get wrong results while searching.
- ▶ **Summary:** In the summary of the article you can add in short, what the article is about. The Agent can use the summary of the article to decide, if the article contains the content he is looking for.

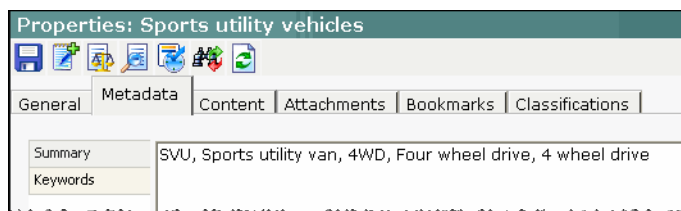
## To add metadata to an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Go to a sub folder and select an article.
3. In the Properties pane, go to the Metadata tab.
4. In the Metadata tab, go to the Summary section and provide the summary of the article.



*Provide summary of the article*

5. Next, go to the Keywords section and specify the keywords for the article. The keywords can be separated using commas.



*Provide keywords of the article*

6. Click the **Save**  button.

# 7 Macros

- ▶ [About macros](#)
- ▶ [Creating macros for articles](#)
- ▶ [Using macros](#)

## About macros

---

Macros are shortcuts that are assigned to an article that allow an agent to quickly add an article to their reply. Using macros is an efficient way for agents to add articles to responses— rather than navigating the KB, finding the article, and then dragging and dropping the article into the reply (or using the 'Add to reply' toolbar button), agents just type the macro in their reply. It is useful to create macros for the top 25% or the most commonly used articles in the knowledge base. Use macros to substitute lengthy or dynamic content with short values. These values, when used, are expanded into complete articles. For example, a lengthy article explaining career opportunities can have a macro, “vacancies.” Suppose a response is being prepared explaining the vacancies (example, “We are pleased to inform you of the following vacancies...”). Instead of typing out the whole list, you can type, “vacancies.” Macros expand when the response is sent out. You can also choose to expand the macros after inserting them.

While creating macros it is very important to consider how you name the macros. The most important thing to note are:

- ▶ The name of the macro should clearly represent what the article is about.
- ▶ If you are working in an environment, in which total handle time on the email is not really that important, then you can have long macro names. But, if you are working in an environment where every keystroke matters, then you should have macro names that are not very long.
- ▶ Have all the macros of same length and all in the same case. It makes it easy for the agents to remember the macro names.

For example: You can use one of the following styles to name the macros.

One naming scheme might be:

- complaintfollowup
- complaintnofollowup
- compliment

Another one might be:

- cfu
- cnf
- com



**Important:** Macro name cannot contain spaces, or any of the following characters: < ` , . ? : ; & " ' !

---

## Creating macros for articles

---

### To create a macro

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Go to a sub folder and select an article.

3. In the Properties pane, go to the General tab and provide the following details about the macro.
  - **Macro name:** Type a macro name.
  - **Macro description:** Type a brief description.
  - **Macro default value:** Type the default value of the macro. When an article macro is expanded, and the article does not have any content, the default value of the macro is used. The default content should be adequate enough to represent the original content.
  - **Macro exception article:** In the field, click the **Assistance** button. Select Article window appears. In the window select the exception article and click the **OK** button. If any error occurs while expanding the macro, the exception article is used. It ensures that if for any reason the macro doesn't expand, the customer is shown some alternate text, and not an error message.





Configure macro properties for an article

4. Click the **Save**  button.

## Using macros

While creating articles, you can use macros to substitute typing of lengthy contents repeatedly. This helps speed up the whole process and eliminates any chances of typographic errors, or copying and pasting errors. To know how to create macros, See “Creating macros for articles” on page 69.

### To use macros in an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. In the List pane, select an article.
3. In the Properties pane, go to the Content tab. Here you can add the macros in the content. You can add the macros in any one of the following ways.
  - Click the **Add macro**  button in the Text box toolbar. Select Macro window appears. From the window select the macro you want to use in the article. If you want to expand the macro, click the **Expand macro**  button.
  - If you know the name of the macro, in the text box, type the macro name preceded by three single opening quotes. Press the space key on the keyboard. The macro expands to its original form displaying the complete content. To prevent the macro from expanding right away, type the macro name with only two single opening quotes. The macro is expanded only when the article is being sent or when you are previewing the article.

# Bookmarks

- ▶ [About bookmarks](#)
- ▶ [Bookmarking articles](#)

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 the 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 bookmarks associated with that queue.



**Important:** You need to have at least 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 folders and chat folders cannot be bookmarked.

---

## Bookmarking articles

---

Articles can be bookmark in two ways:

- ▶ Bookmark articles individually while creating them.
- ▶ First, create all articles and then bookmark them using the manage bookmarks option.

### Bookmarking individual articles

You can bookmark articles individually while creating them.

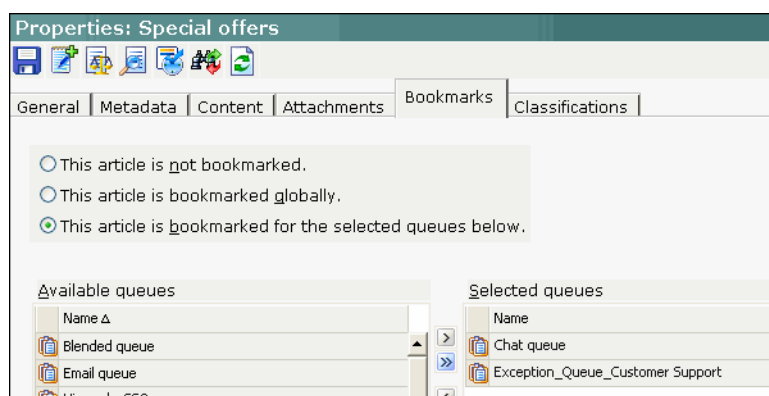
## To bookmark an article

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



**Important:** Articles created in the personal folders and chat folders can't 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 from the available options select one.
  - **This article is not bookmarked:** This option is selected by default.
  - **This article is bookmarked globally:** Global bookmarks are available to all the users who have view permissions on the folder, in which the bookmarked article is located.
  - **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 what articles are bookmarked for which queues, and which all articles are bookmarked globally.

### To manage bookmarks


1. In the Tree pane, browse to **Knowledge Base > Departments > Your Department**.
2. In the Tree pane toolbar, click the **Manage bookmarks**  button.

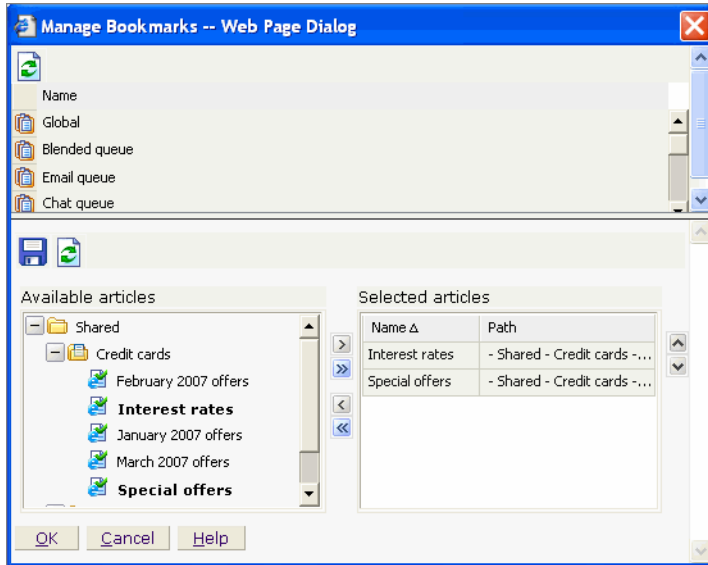
Manage Bookmarks window appears. Here you can check which articles are bookmarked for each queue and which articles are bookmarked globally. Also, if required, you can add or remove bookmarks.

3. In the window, provide the following details.
  - a. Select **Global**, if you want to bookmark articles globally. Or, select a queue for which you want to bookmark the articles.



**Important:** An article can be bookmarked for multiple queues.  
But if the article is bookmarked globally, it can't be bookmarked for any queue.

- b. Now, select the articles you want to bookmark.
- c. Click the **Save**  button.



*Manage all bookmarks for a department*



# Suggestions

- ▶ [Managing approval processes](#)
- ▶ [Deleting approval process](#)
- ▶ [Working on suggestions](#)
- ▶ [Tracking the status of 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, allowing agents to contribute articles.

## Managing approval processes

---

An article created from Agent Console by the KB agent is initially in the suggested state. It is processed based on defined approval processes.

Review these articles to approve them or else send them back to the agent for further modifications. Articles added by users to their personal folder are approved automatically, and do not follow the review process.

The system provides one pre-defined approval process.

### Approval groups

While planning your approval process you need to decide if there will be one or multiple levels in the approval process. You can also have more than one approver at each level.

### Creating approval processes





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

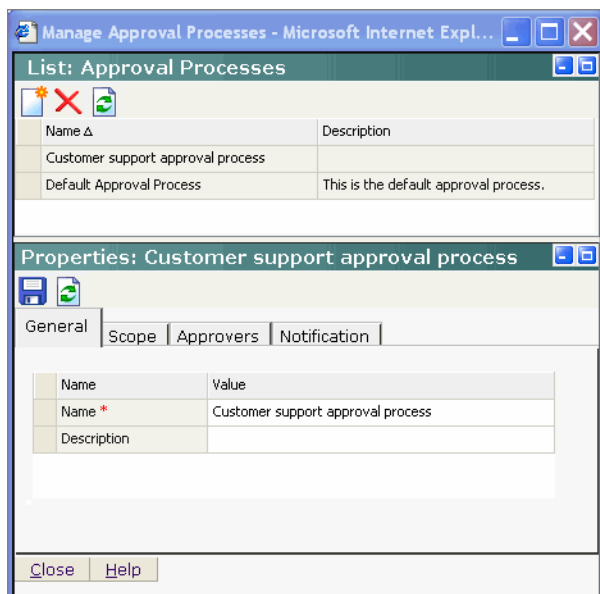
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#### To create an approval process

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

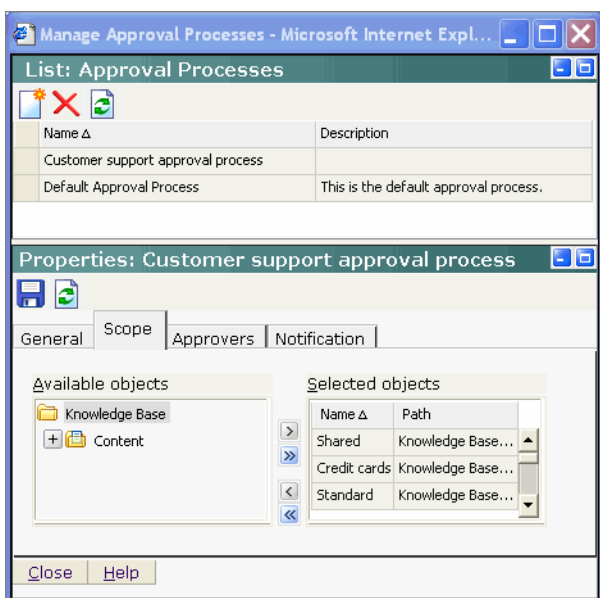
The Properties pane refreshes to show the attributes of the new approval process.

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.



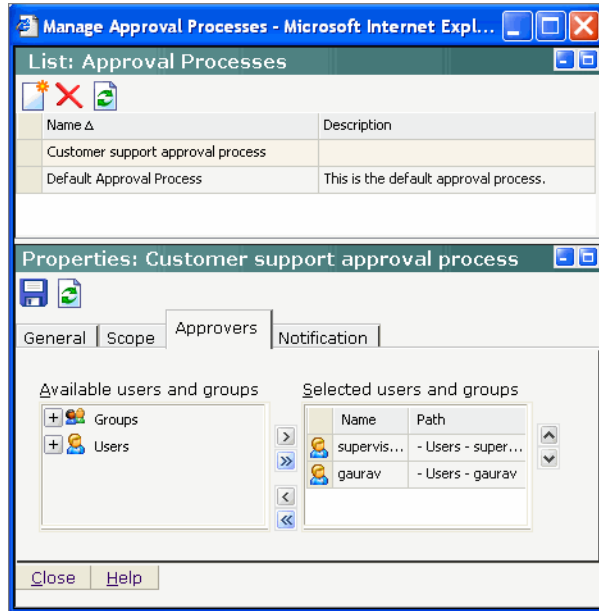
*Set the general properties*

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



*Configure scope of the approval process*

- Now, go to the Approvers tab and specify the users and user groups who can approve articles in the folders selected in the Scope tab. 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.



Select approvers

7. Lastly, in the Notification tab set up notifications for the approval process. For more details, see “Setting up notifications” on page 57.
8. Click the **Save** button.




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






## Setting up notifications

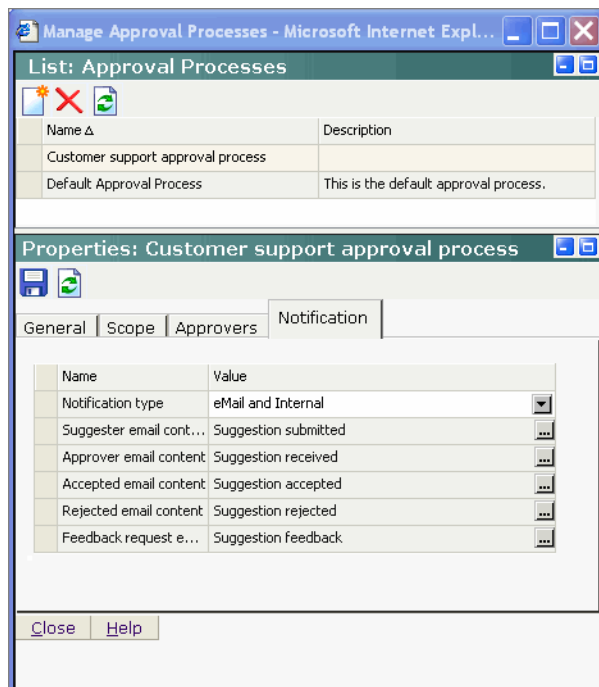
Notifications are messages sent to internal users, using the messaging infrastructure. You can send a notification when a suggestion is submitted, approved, rejected, or sent back with feedback. The notification can be sent to internal users as well as to external email addresses.

Before setting up the notifications you should first create the articles you want to use in the five types of notifications you can send.

### To setup notifications

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department***.
2. In the Tree pane toolbar, click the **Manage approval processes**  button.
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 email content for the notification email to be sent to the suggester when a suggestion is submitted. Click the **Assistance**  button in the field and select the article from the Select Article window.
- **Approver email content:** Specify the email content for the notification email to be sent to the approver when a suggestion is submitted. Click the **Assistance**  button in the field and select the article from the Select Article window.
- **Accepted email content:** Specify the email content for the notification email to be sent to the suggester when a suggestion is approved. Click the **Assistance**  button in the field and select the article from the Select Article window.
- **Rejected email content:** Specify the email content for the notification email to be sent to the suggester when a suggestion is rejected. Click the **Assistance**  button in the field and select the article from the Select Article window.
- **Feedback request email content:** Specify the email content for 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 the article from the Select Article window.



Select notification type and configure notification messages



5. Click the **Save**  button.

## Deleting approval process



**Important:** If there are any pending articles in an approval process, then it can't 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, click the **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 the agent, a notification is sent to the approvers, if the notification process has been set. You can view the suggested articles at two places in the KB Console:

- ▶ You can view them in the suggestions folder in the useful items folder. In this folder, you can view only 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 on only 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 any 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 always a good practice to add a note to it, to let the suggester know why the suggestion is being rejected. If in the approval process there are two levels of approvers 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 Console.
- ▶ You can send back the article with feedback. If, for any reason, you find 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 Console.

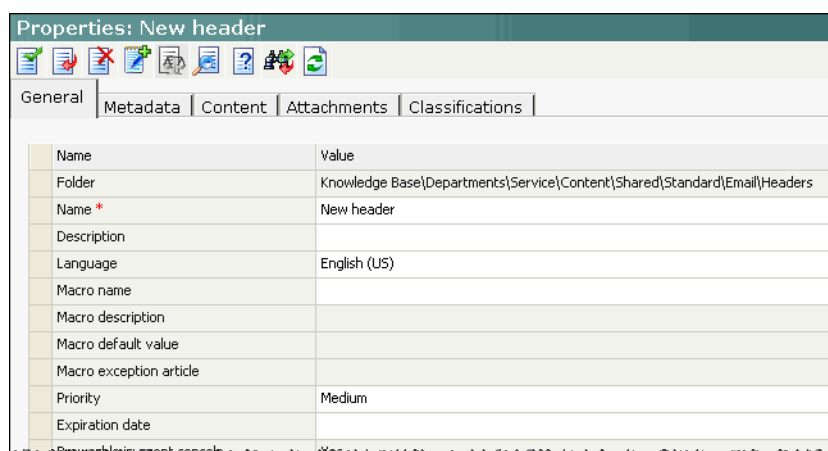
## To review a suggestion

1. In the Tree pane, browse to **Knowledge Base > Useful Items > 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 any changes to 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 in the knowledge base. But if in the approval process, there is another level of approval after you, then the article is made available for approval to approvers in 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 conveying to the suggester, what all changes he needs to make to the article. To know more about adding notes, see “Adding notes” on page 36.




*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

Time	Event	Priority	State	Notes
7/1/200...	Suggest	Medium	Suggest...	
1/20/20...	Approve	Medium	Suggest...	
3/24/20...	Feedback	Medium	Agent to...	Can you clarify the objective of thi...

Close Help

*Track status of suggested article*

# 10

## Article rating

- ▶ [Rating articles](#)

# Rating articles

---


Authors can rate articles to denote their usefulness. These ratings are not displayed anywhere. A combination of these ratings and usage statistics determine which articles that get featured in the **Most Popular Articles** folder in the **Useful Items** folder.

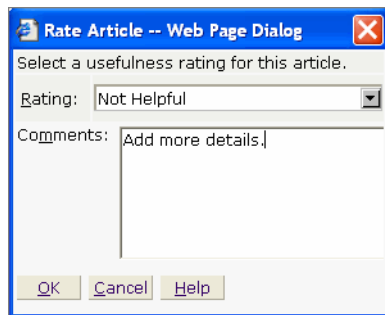


**Important:** Quick responses and quick links cannot be rated.

---

## To rate an article

1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Go to a sub-folder and select the article you want to rate.
3. In the Properties pane toolbar, click the **Rate article**  button.
4. In the Rate Article window, provide the following details.
  - **Rating:** Select the level of usefulness of the article. The options available are, very helpful, helpful, and not helpful.
  - **Comments:** Add your comments.



*Rate an article*

5. Click the **OK** button to submit your rating.

# 11 Printing

- ▶ [Printing articles](#)
- ▶ [Printing folders](#)


You can either print selected articles in a folder or all the articles contained in a folder and its subfolders.

## Printing articles


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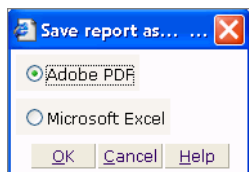
You can print articles directly from KB Console. The print option also allows you to save an article in the PDF or Excel format on your local machine. The functionality allows you the option to print a single article or a complete folder.

### To print a selected article:

1. Select the article in the List pane. You can select more than one articles.
2. Click the **Print preview**  button in the List pane toolbar.

KB Article window appears. It shows the details of the articles you have selected for printing.

3. In the KB Article window, click the **Save As**  button. The Save As window appears.
4. In the Save As window, select the format in which you want to save the contents of the article. The options available are **Adobe Acrobat PDF** and **Microsoft Excel**.



*Select the format for saving an article*


5. Click the **OK** button. A copy of the article is saved on the location you selected.
6. Print as many hard copies as you want.

## Printing folders


---

You can print all the articles contained in a folder in one go. When you select a folder for printing, and it has subfolders in it, then all the articles contained in the sub-folders also get printed.

### To print all articles in a folder:

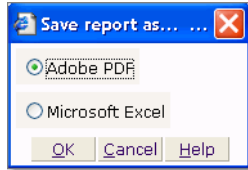
1. Select a folder in the Tree pane.
2. Click the **Print preview**  button in the Tree pane toolbar.

KB Folder window appears. It shows the details of all the articles contained in the folder.

3. In the KB Folder window, click the **Save As**  button.

The Save As window appears.

4. In the Save As window, select the file format in which you want to save the contents of the folder. The options available are **Adobe Acrobat PDF** and **Microsoft Excel**.



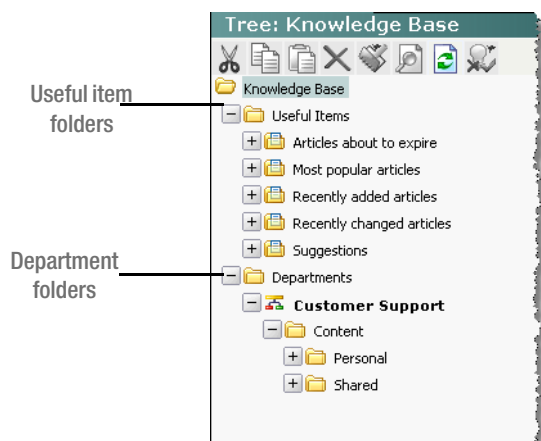
*Select the format for saving contents of a folder*

5. Click the **OK** button. A copy of the articles is saved on the location you selected.
6. Print as many hard copies as you want.

# Useful items folders

- ▶ [About useful item folders](#)
- ▶ [Creating useful item folders](#)
- ▶ [Deleting useful items folders](#)

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



*Folders in the KB Console tree*

## About useful item folders

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

The default **Useful Items** folders provided in the system are the following.

- ▶ Articles about to expire
- ▶ Most popular articles
- ▶ Recently added articles
- ▶ Recently changed articles
- ▶ Suggestions

### Articles about to expire

This folder contains a list of articles which are about to expire. Through the setting, **Time to expire in days**, 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.

### Most 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

## Recently added articles

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

## Recently changed 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.

## Suggestions

Through the Agent Console, agents can suggest some articles or responses to be included in the knowledge base. This folder contains a list of such articles suggested by agents. The suggestions can either be approved or rejected.

# Creating useful item folders

---

You can create useful item folders if you have been granted permission to perform the following actions:

- ▶ Create useful items folder
- ▶ Edit useful items folder

Useful items folders can be created with either of the following two methods:

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

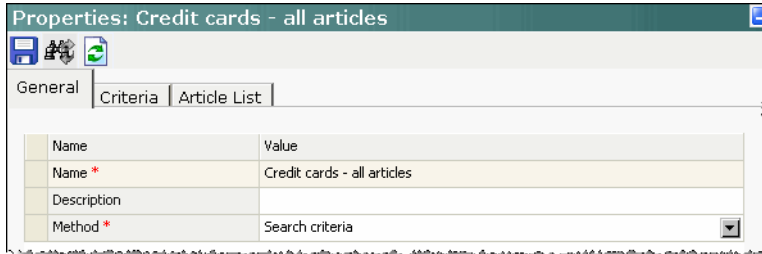
## Creating useful items folders dynamically through search

**To create a useful items folder dynamically through search:**

1. In the Tree pane, browse to **Knowledge Base > Useful Items**.
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**.

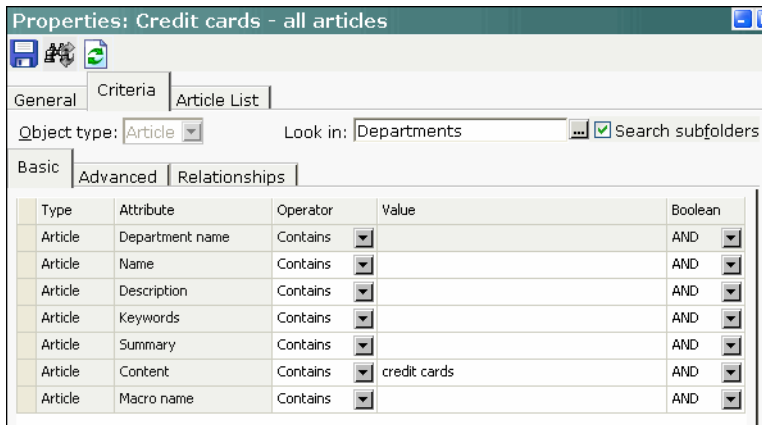


**Important:** The **Criteria** tab and **Article List** tab are enabled only after you select a method in the **General** tab.



*Set the general properties*

- Next, go to the **Criteria** tab, and specify the search criteria. You can search for the articles using both basic and advanced search. For more details on search see chapter on search.



*Set the criteria for search*

- Lastly, go the **Article List** tab. Here, you can view the list of the articles meeting the search criteria specified in the **Criteria** tab.




*View the list of selected articles*

- Click the **Save**  button.

## Creating useful items folders by selecting articles

### To create a useful items folder by selecting articles:

1. In the Tree pane, browse to **Knowledge Base > Useful Items**.
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**.

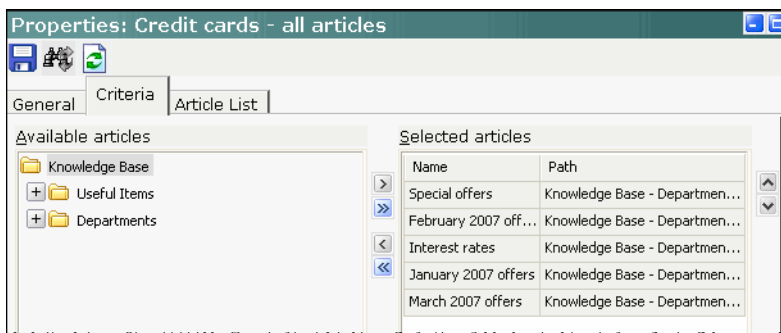


**Important:** The **Criteria** tab and **Article List** tab is enabled only after you select a method in the **General** tab.



*Set the general properties*

4. Next, go to the Criteria tab and select the articles you want to add in this folder. 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 you selected in the Criteria tab.

Name	Description	Creation time	Create...	State	Type	Expiry state
Special o...		3/23/2007 ...	pa	Approved	Article	Current
Februar...		3/23/2007 ...	pa	Approved	Article	Current
Interest ...		3/23/2007 ...	pa	Approved	Article	Current
January ...		3/23/2007 ...	pa	Approved	Article	Current
March 2...		3/23/2007 ...	pa	Approved	Article	Current

*View the list of selected articles*


6. Click the **Save**  button.

## Deleting useful items folders

Action needed: Delete useful items folder

You can delete a folder only if you have the action assigned to delete the useful items folders.

### To delete a useful items folder:

1. In the Tree pane, browse to **Knowledge Base > Useful Items > Your Folder**.
2. Select the folder 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 useful items folders.