



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

For Unified Contact Center Enterprise

Release 4.3(1)
May 2012

Americas Headquarters
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
<http://www.cisco.com>
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883

THE SPECIFICATIONS AND INFORMATION REGARDING THE PRODUCTS IN THIS MANUAL ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL STATEMENTS, INFORMATION, AND RECOMMENDATIONS IN THIS MANUAL ARE BELIEVED TO BE ACCURATE BUT ARE PRESENTED WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. USERS MUST TAKE FULL RESPONSIBILITY FOR THEIR APPLICATION OF ANY PRODUCTS.

THE SOFTWARE LICENSE AND LIMITED WARRANTY FOR THE ACCOMPANYING PRODUCT ARE SET FORTH IN THE INFORMATION PACKET THAT SHIPPED WITH THE PRODUCT AND ARE INCORPORATED HEREIN BY THIS REFERENCE. IF YOU ARE UNABLE TO LOCATE THE SOFTWARE LICENSE OR LIMITED WARRANTY, CONTACT YOUR CISCO REPRESENTATIVE FOR A COPY.

The Cisco implementation of TCP header compression is an adaptation of a program developed by the University of California, Berkeley (UCB) as part of UCB's public domain version of the UNIX operating system. All rights reserved. Copyright 1981, Regents of the University of California.

NOTWITHSTANDING ANY OTHER WARRANTY HEREIN, ALL DOCUMENT FILES AND SOFTWARE OF THESE SUPPLIERS ARE PROVIDED "AS IS" WITH ALL FAULTS. CISCO AND THE ABOVE-NAMED SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THOSE OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OR ARISING FROM A COURSE OF DEALING, USAGE, OR TRADE PRACTICE.

IN NO EVENT SHALL CISCO OR ITS SUPPLIERS BE LIABLE FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, OR INCIDENTAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOST PROFITS OR LOSS OR DAMAGE TO DATA ARISING OUT OF THE USE OR INABILITY TO USE THIS MANUAL, EVEN IF CISCO OR ITS SUPPLIERS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Cisco and the Cisco logo are trademarks or registered trademarks of Cisco and/or its affiliates in the U.S. and other countries. To view a list of Cisco trademarks, go to <http://www.cisco.com/go/trademarks>

CCVP, the Cisco logo, and Welcome to the Human Network are trademarks of Cisco Systems, Inc.; Changing the Way We Work, Live, Play, and Learn is a service mark of Cisco Systems, Inc.; and Access Registrar, Aironet, Catalyst, CCDA, CCDP, CCIE, CCIP, CCNA, CCNP, CCSP, Cisco, the Cisco Certified Internetwork Expert logo, Cisco IOS, Cisco Press, Cisco Systems, Cisco Systems Capital, the Cisco Systems logo, Cisco Unity, Enterprise/Solver, EtherChannel, EtherFast, EtherSwitch, Fast Step, Follow Me Browsing, FormShare, GigaDrive, HomeLink, Internet Quotient, IOS, iPhone, IP/TV, iQ Expertise, the iQ logo, iQ Net Readiness Scorecard, iQuick Study, LightStream, Linksys, MeetingPlace, MGX, Networkers, Networking Academy, Network Registrar, PIX, ProConnect, ScriptShare, SMARTnet, StackWise, The Fastest Way to Increase Your Internet Quotient, and TransPath are registered trademarks of Cisco Systems, Inc. and/or its affiliates in the United States and certain other countries. Any Internet Protocol (IP) addresses used in this document are not intended to be actual addresses. Any examples, command display output, and figures included in the document are shown for illustrative purposes only. Any use of actual IP addresses in illustrative content is unintentional and coincidental.

Third-party trademarks mentioned are the property of their respective owners. The use of the word partner does not imply a partnership relationship between Cisco and any other company. (1110R)

Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide: For Unified Contact Center Enterprise. May 10, 2012.

Copyright © 2012, Cisco Systems, Inc. All rights reserved.

Contents

- Preface7**
 - About This Guide 8
 - Document Conventions..... 8
 - Other Learning Resources..... 9
 - Online Help 9
 - Document Set 9

- Chapter 1: Console Basics11**
 - About the Knowledge Base..... 12
 - Author Once, Use Everywhere 12
 - Enhance Customer Experience With High-Quality Responses 12
 - Improve Agent Productivity With Easy Access Through Agent Console 12
 - Easily Find Content With Indexed Smart Search 12
 - Key Terms and Concepts 13
 - Related Actions, Roles, and Permissions 14
 - Author Role..... 14
 - User Permissions 15
 - Elements of the Console Interface 16

- Chapter 2: Search for Information17**
 - Creating Searches 18
 - Deleting Searches 19
 - Saving Searches 19
 - Running Saved Searches..... 20
 - Stopping Searches..... 20
 - Creating a Search From Saved Searches..... 20
 - Locating Articles in the Console..... 21
 - Exporting Search Results 21
 - Printing Search Results 21

Chapter 3: Content Folders.....23

Department Folders 24

 Content 24

 Shared 24

 Standard 24

 Personal 25

Managing Folders 25

 Creating Folders 25

 Assigning Permissions on Folders 26

Deleting Folders 27

Copying Folders 28

Chapter 4: Article Content.....29

About Articles 30

Creating Articles 30

 Creating Content 31

 Inserting Tables in Articles 35

 Previewing Content 36

Deleting Articles 37

Updating Articles 37

Classifications 39

 Classifying Articles 39

Working With Notes 39

 Adding Notes 39

 Deleting Notes 40

Viewing Versions 41

Creating Copies of Articles 42

Chapter 5: Attachments44

About Attachments 45

Working With Internal Attachments 45

 Attaching Internal Files 45

Working With External Attachments 46

 Setting up Access to the Source 46

Attaching External Files	46
Deleting Attachments	47
Previewing Attachments	47
Chapter 6: Metadata	49
Adding Metadata.	50
Chapter 7: Macros	51
About Macros	52
Creating Macros for Articles.	52
Using Macros	53
Chapter 8: Bookmarks	54
About Bookmarks	55
Bookmarking Articles	55
Bookmarking Individual Articles	56
Managing Bookmarks	56
Chapter 9: Suggestions	58
Managing Approval Processes	59
About Approval Levels and Groups	59
Creating Approval Processes	59
Setting up Notifications.	61
Deleting Approval Processes	62
Working on Suggestions	63
Tracking the Status of Suggestions.	64
Chapter 10: Article Rating	66
Rating Articles	67
Chapter 11: Printing	68
Printing Articles	69
Printing Folders.	69

Chapter 12: Useful Items Folders.....71

About Useful Item Folders 72

- Articles About to Expire 72
- Most Popular Articles 72
- Recently Added Articles 73
- Recently Changed Articles 73
- Suggestions 73

Creating Useful Item Folders 73

- Creating Useful Items Folders Dynamically Through Search 73
- Creating Useful Items Folders by Selecting Articles 75

Deleting Useful Items Folders 76

Chapter 13: Multilingual Content.....77

Planning a Multilingual KB 78

- Primary Language 78
- Knowledge Bases in Multiple Languages. 78
- Translation. 79
- Article Attachments. 79
- Agent Usage 80
- Modifying Translations. 80
- Reports 81

Getting Started 81

- Making Additional KB Languages Available in Departments 81
- Changing Primary KB Language for Departments. 82
- Changing Default Dictionary for Departments 82
- Assigning KB Languages to Users 82
- Setting Translation Option for KB Objects. 83
- KB Objects Available for Translation. 83

Exporting Content for Translation 84

Importing Translated Content 85

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

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

This guide uses the following typographical conventions.

Convention	Indicates
<i>Italic</i>	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.
<i>Variable</i>	User-specific text; varies from one user or installation to another.


Document conventions

Other Learning Resources

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
 Help 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. 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/voicew/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*

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

- ▶ [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 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 touch point.

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 article suggestions 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, sub folders, 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 sub folders.

Folder

The KB is hierarchically organized into folders and sub folders. 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 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, and portal users through the portal. Authors view these suggestions in the KB Console and approve, edit, or reject them.

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 Administrator's Guide to Administration Console*.

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

Resource	Actions permitted
Macro	View
Suggestions	Manage
Reports	Run, View, Create, Schedule, Delete, Edit
Approval process	Manage

Actions assigned to the Author 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.

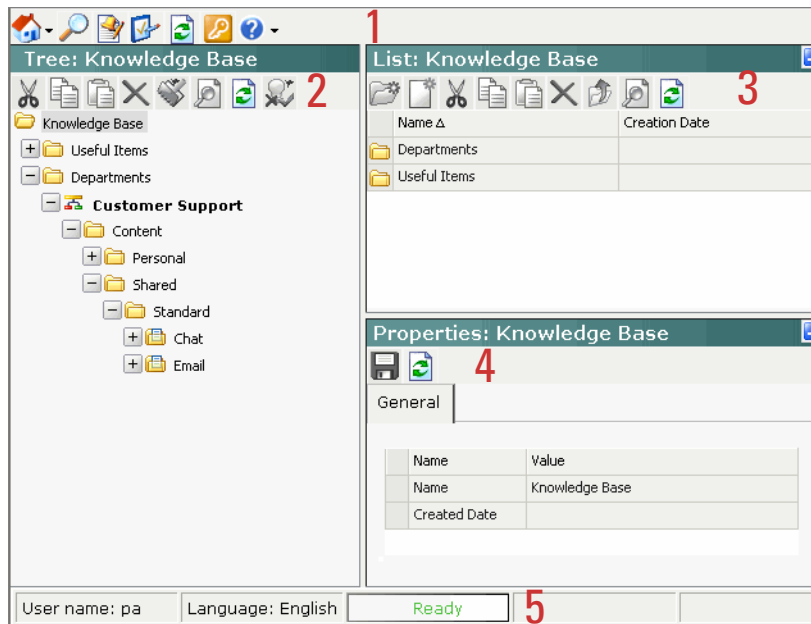
Permissions are used only for folders under the **Shared** node in the KB. Other folders in the KB tree are visible to all authors. Permissions for folders are inherited by sub folders.

- ▶ 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 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 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:

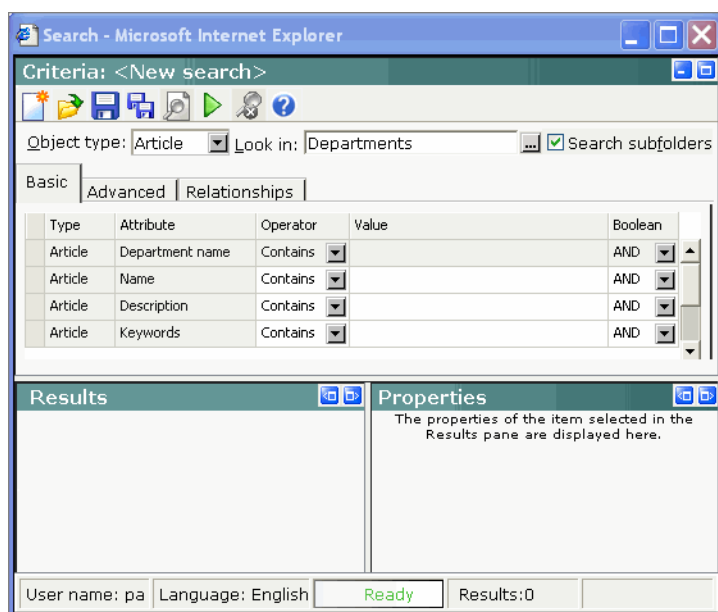
1. In the Knowledge Base Console toolbar, click the **Search**  button.

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. 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. An 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 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, 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 a 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.
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, 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 the Excel format.


Printing Search Results

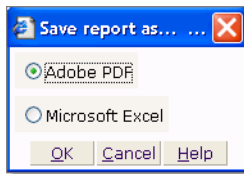
You may want to print search results to either review further or share with others.

To print search results:

1. After you have run the search, click the **Print 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. 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.

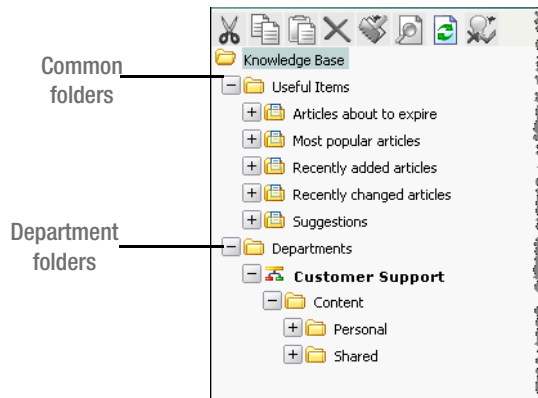


Select a format for saving search results

3 Content Folders

- ▶ [Department Folders](#)
- ▶ [Managing Folders](#)
- ▶ [Deleting Folders](#)
- ▶ [Copying 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.



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

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

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

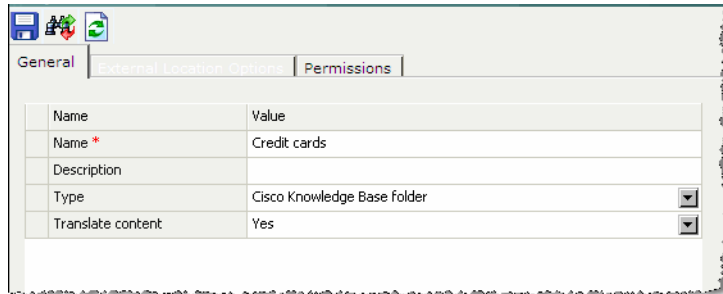
You can create folders and sub folders to organize articles. Remember that you require the necessary permissions to create and modify folders.

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.
 - **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 on permissions, see [“Assigning Permissions on Folders”](#) on page 26.

Assigning Permissions on Folders

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

- ▶ 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:

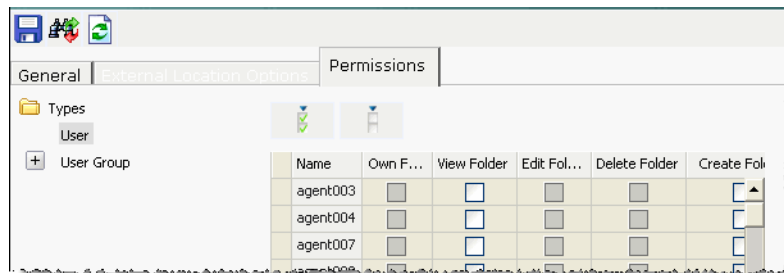
1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the folder on which you want to assign permissions.

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 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 the delete permission on the folder. If you are deleting multiple folders and you do not have the delete permission on all of them, only those folders on which you have delete permission get deleted. You are notified about the 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.

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 a folder from one folder to another, use the **Cut**  button to remove the folder from the folder in which it exists 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 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 are copied, check the permissions assigned to the users on the folder. If required, edit the properties of the newly created folder.



Article Content

- ▶ [About Articles](#)
- ▶ [Creating Articles](#)
- ▶ [Deleting Articles](#)
- ▶ [Updating Articles](#)
- ▶ [Classifications](#)
- ▶ [Working With Notes](#)
- ▶ [Viewing Versions](#)
- ▶ [Creating Copies of Articles](#)

About 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.



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

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. Instead of remembering and typing them each time, agents can use these standard responses. 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 reduces the number of clicks and the agent does not need to type the same message repeatedly.
 - Quick Links: Quick links are frequently used web page URLs that can be easily used by agents in chat sessions. Instead of remembering and typing them each time, agents can use these standard web pages in the Information pane, Cobrowse section. 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 has to be mapped to a queue. This can be done from the Administration Console. Only the mapped quick responses and quick links are made available in the Agent Console. All the quick responses and quick links which the agent is allowed to access, appear in the KB 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 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 KB section of the Information pane.

Creating Articles

You can create articles from the Knowledge Base (KB) Console. Based on the licenses that you have, you can use the same article 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 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 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.

You can create two types of article:

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

You can change the type of an article even after creating 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.

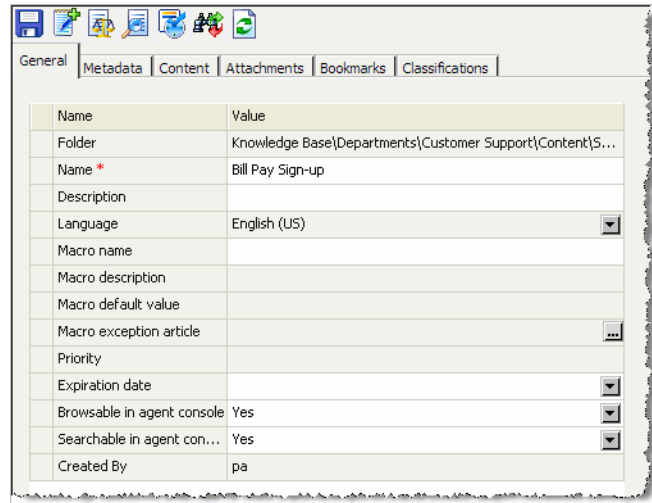
To create an article:

1. In the Tree pane, browse to **Knowledge Base > Departments > Department_Name > 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:** Displays the language of the article. The value in the field gets automatically selected and cannot be changed.
 - **Macro name:** Type the macro name for the article. This can be used as a shortcut for the article. For more details on macros and how to create them, see [“Creating Macros for Articles” on page 52](#). Along with this field, the Macro description, Macro default value, and Macro exception article fields are described in the Macros chapter.
 - **Priority:** This field is enabled only for suggested articles and articles that have already gone through the approval process and are approved. The possible values are - Low, Medium, and High. For all other articles, the field is always disabled and blank.
 - **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 you do not 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. Select **No** if you do not want the agents 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.
- **Created By:** Shows the name of the user who created the article.

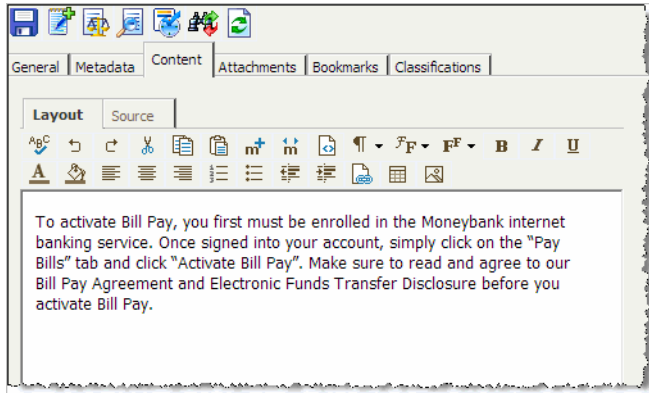


Set the general properties


- Now, go to the Content tab. In the Layout subtab, create the content of the article.
 - First, select the type of article you want to create. HTML is selected by default. In the Text box toolbar, click the **Switch to HTML editor**  button to create a plain text article, if needed. When you change the type from HTML to plain, the Source subtab becomes unavailable and any formatting of the existing content is lost.
 - Next, type the content of the article in the text box. Here you can use the various formatting tools available to format the article content. You can also add hyperlinks to the HTML type articles.

When you are creating quick responses and quick links, it is important to note that when agents use the quick responses and quick links in chat, the content is displayed in plain text. In other words, the content of the quick responses and quick links is displayed in the same font and style as are the other

messages that the agent types. So, it is recommended that you don't spend time formatting the text of these articles.




Create the content of the article

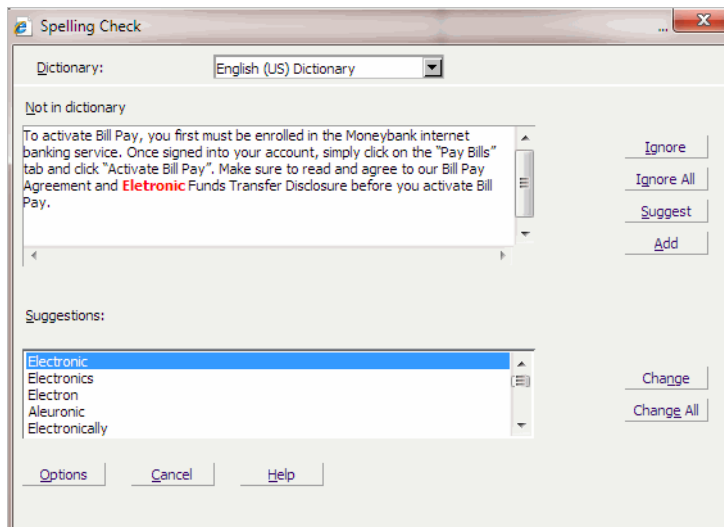
- c. To add hyperlinks to the article content, click the **Insert Hyperlink**  button in the Text box toolbar and in the Explorer User Prompt window, type the hyperlink you want to add.




Type the web address

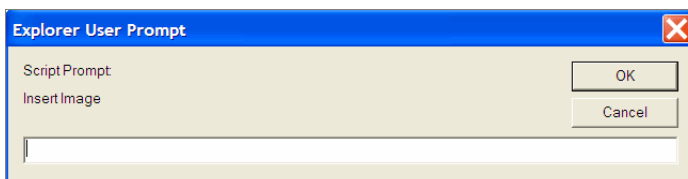
After creating the content, you can run the spell-checker on the content.

- d. To run the spell-checker, in the Text box toolbar, click the **Spell Check**  button. The Spelling Check window appears. This button is disabled if the article content is in a language that does not have spell-checker support. The Not in dictionary section shows the misspelled words in red and the Suggestions section shows the suggested words for them. You can either ignore the suggestions or you can change the misspelled word to the suggested words. 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

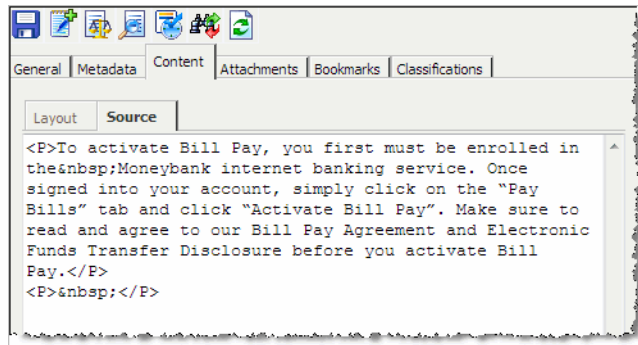
- e. To insert an image from an external location, click the **Insert image**  button and provide the URL in the Explorer User Prompt window. The images should be stored at a location that is accessible to external user. If the image is removed from this external resource or the address is changed, the inserted image will no longer be visible. Instead, a red X or a placeholder may appear in its place.




Type the URL of the image

- f. 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. Now, go to the Source subtab of the Content tab. In the Source subtab, you can view the HTML code of the content created in the Layout subtab. 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. If you are using the Plain

text editor, then the Source subtab is not available. If you make any changes to the Layout or Source subtab and switch between the subtabs, you cannot undo the changes using the **Undo**  button or the Windows shortcut (Ctrl+Z).




Edit the HTML code of the article

7. In the Metadata tab, specify the metadata for the article. For details, see [“Metadata” on page 49](#).
8. In the Attachments tab, attach external and internal attachments to the article. For details, see [“Attachments” on page 44](#).
9. In the Bookmarks tab, bookmark the article for queues or globally. For details, see [“Bookmarks” on page 54](#).
10. In the Classifications tab, assign categories and resolution codes to the article. For details, see [“Classifications” on page 39](#).
11. Click the **Save**  button.

Inserting Tables in Articles

While creating articles, you can add tables to display and organize data in a better way. Once a table is created, its properties cannot be edited from the Layout subtab. For example, you cannot add rows and columns to the table. However, if you are familiar with HTML coding, you can edit the table from the Source subtab.

To insert a table:

1. In the Tree pane, browse to **Knowledge Base > Departments > *Department_Name* > Content**.
2. In the List pane, select an article.
3. In the Properties pane, go to the Content tab and in the Layout subtab, click the **Insert table**  button.
4. In the Insert table window provide the following details about the table:
 - **Rows:** Type the number of rows.
 - **Cols:** Type the number of columns.
 - **Width:** Specify the width of the row in percent or pixels.

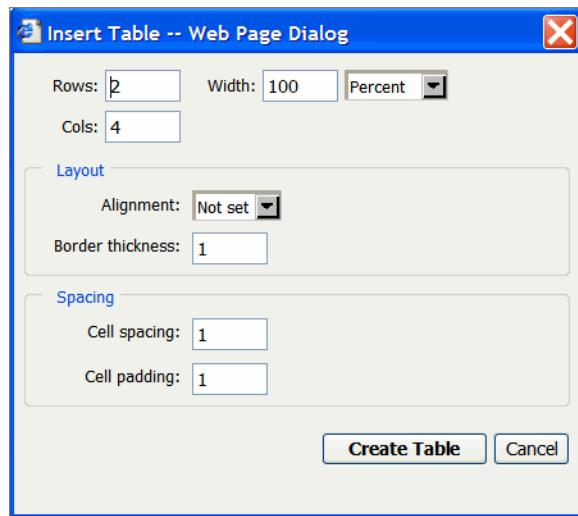
In the Layout section, specify the following:

- **Alignment:** Set the alignment of the table. The options available are - Left, Right, or Middle.
- **Border thickness:** Specify the width, in pixels, of the table’s borders.

In the Spacing section specify the following:

- **Cell spacing:** Specify the space between table cells.

- **Cell padding:** Specify the amount of space between the contents of the cell and the cell wall.




Specify table properties

5. Click the **Create Table** button to insert the table in the article.

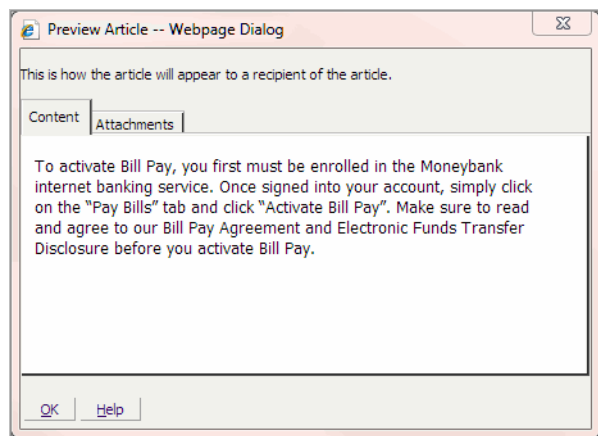
Previewing Content

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 an 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 in the List pane select an article.
3. 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.

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 the personal folder, can be only deleted 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 the Media tab in a 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.


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 an article:

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.
 - In the Find where section, specify the scope of search. Choose from one of the following 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 sub folders.
 - **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 only find the 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*. If you don't select this option, it will replace the word *invest* in all the words - *invest*, *investing*, *invested*, and *investment*.
- **Unattended replace:** This option is enabled only when the scope of search is more than one article. If, in the Find where section 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:** Replaces all the occurrences of the searched word and in the end tells the number of words that were replaced. This option is available only when you are editing text in a single article, or you have selected the **Unattended replace** option.



Find and replace text

Classifications

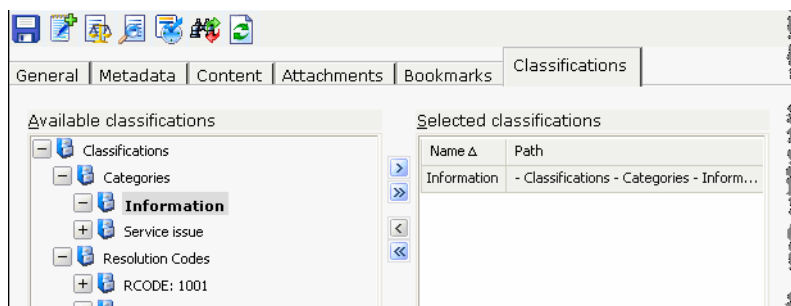
Classifications are used by the system to efficiently organize all the articles according to any specific feature. When such articles are used in activities and responses, they too get classified in the same group. The system provides you with two classification tools, categories and resolution codes.

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 and to 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 articles for modifications to agents. More more details on the approval process, see [“Suggestions” on page 58](#).

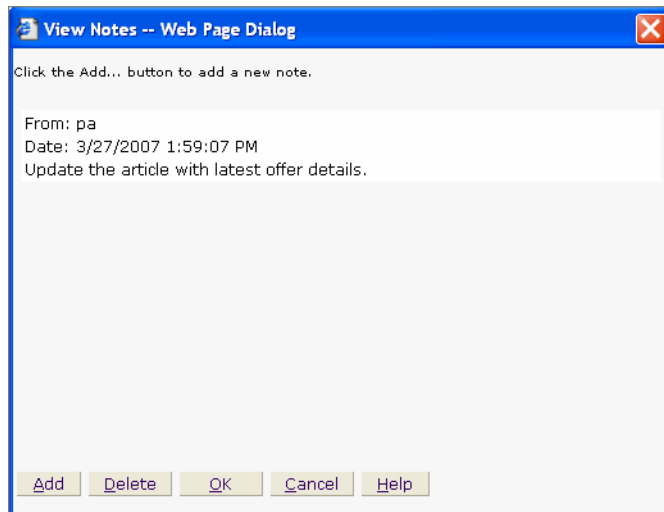
Adding Notes

To add a note:

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

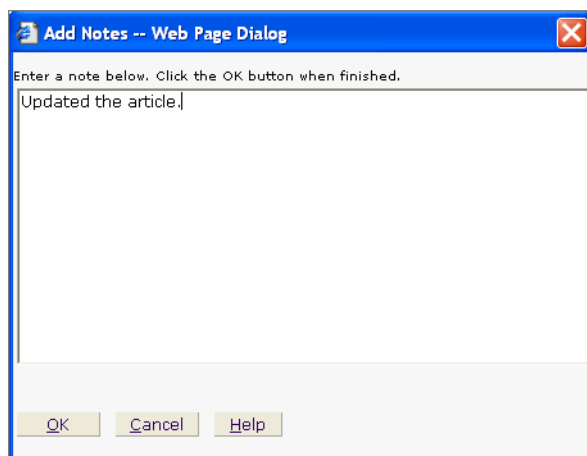
2. Select the article to which you want to add a note.
3. In the Properties pane toolbar, click the **Notes**  button.

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



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

4. Click the **Add** button to add a new note. The 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 existing 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 a track of the changes made 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 are deleted automatically.

To view versions of an article:

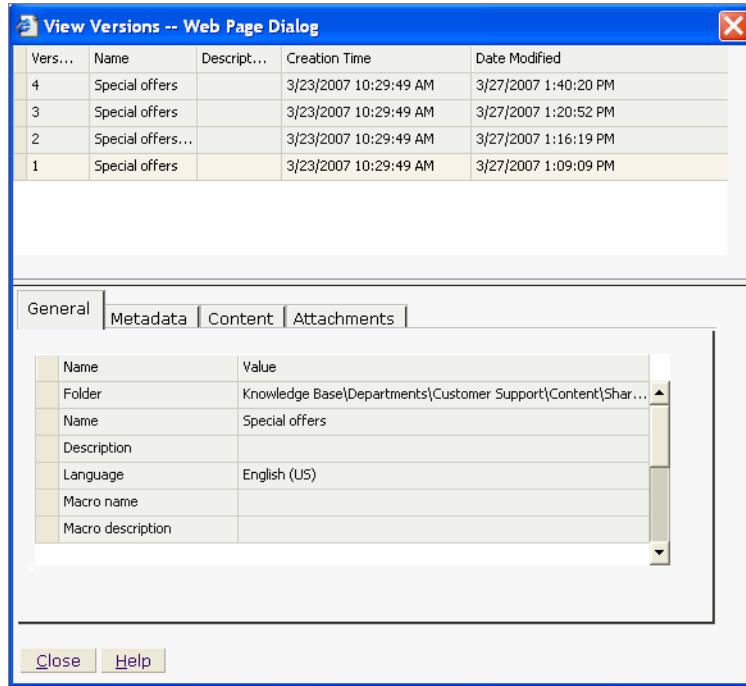
1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select the article for which you want to view the versions.
3. In the Properties pane toolbar, click the **View versions**  button.

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. Versions of custom attributes can not be created hence they are not displayed in General tab of the Properties pane.



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 folder 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 and paste an article, all the properties of the article are copied over. But, when you copy and paste an article, the four macros fields on the General tab do not 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 the **View folders** permission on that folder.
- ▶ To cut articles from a folder, you need to have the **Delete articles** permission on that folder.
- ▶ To paste articles in a folder, you need to have the **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 in the List pane toolbar click the **Paste**  button.

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 in the List pane toolbar click the **Paste**  button.

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 file 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 the 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.


Working With Internal Attachments

You can add internal attachments from your local machine or from a machine on the network. 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.

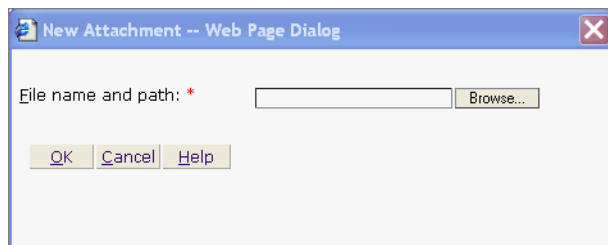
Attaching Internal Files

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.

The 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.

Working With External Attachments

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 an external attachment.

Attaching External Files

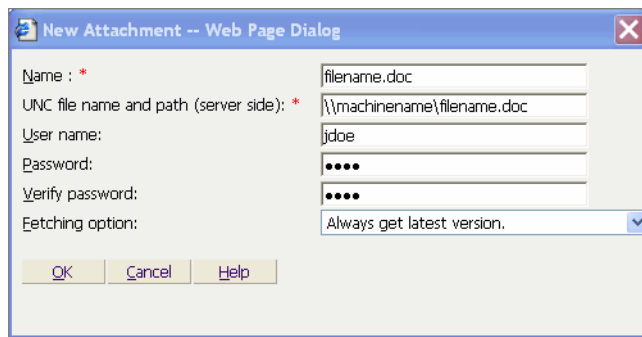
To attach an external file to an article:

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. In the External section, click the **New**  button.

The 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. The 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:

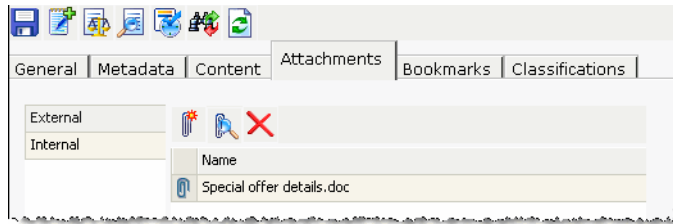
1. In the Tree pane, browse to **Knowledge Base > Departments > *Your Department* > Content**.
2. Select an article in the List pane.
3. In the Properties pane, go to the Attachments tab.
4. Go to the Internal or External section and select the attachment you want to delete.
5. Click the **Delete** 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

- Next go to the Internal or External section. If the article has any attachments, they are listed here.



Select an attachment

- 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](#)

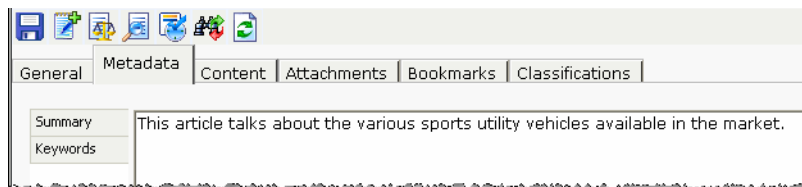
Adding Metadata

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 to help identify 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. As a KB designer, you would want a particular article on sports utility vehicles to be shown to users, irrespective of the choice of words (phrasing) that the user provides. 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:** The summary of the article can be a one-line review of the content of the article.

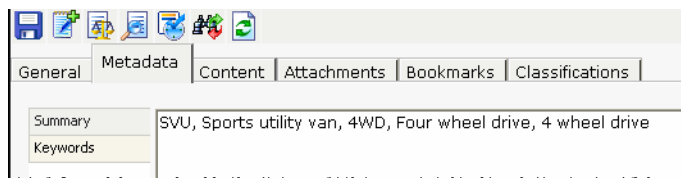
To add metadata to an article:

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 a summary of the article

5. Next, go to the Keywords section and specify the keywords for the article. The keywords should 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. Macros allow authors to single-source frequently used content by inserting an article macro within another article, and agents to quickly add articles to their responses. 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** button), agents just type the macro in their reply. It is useful to create macros for the top 25% of 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 things 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

Another one might be:

- cfu
- cnf




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

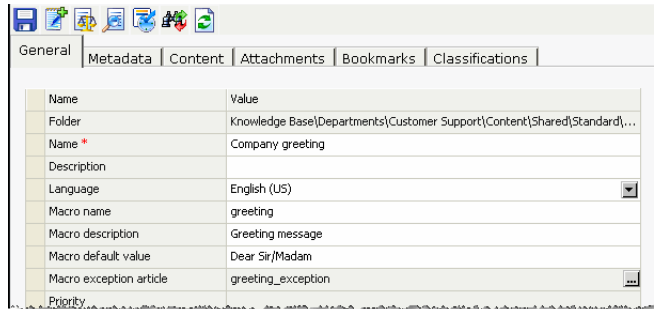
Creating Macros for Articles

To create a macro:

1. In the Tree pane, browse to **Knowledge Base > Departments > *Department_name* > 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 the macro name.

The following fields are enabled only after you provide 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. The 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 the macro does not 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 52](#).

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, from the Layout sub-tab 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. The 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 reversed prime characters ('). 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 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 bookmark 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.

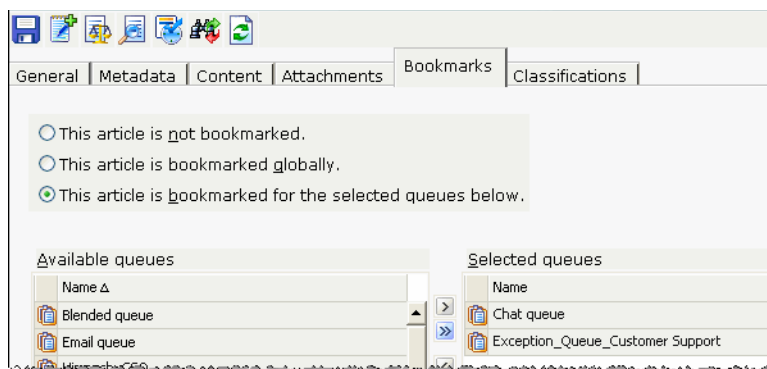
To bookmark an article:

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, click the **Manage bookmarks**  button.


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.

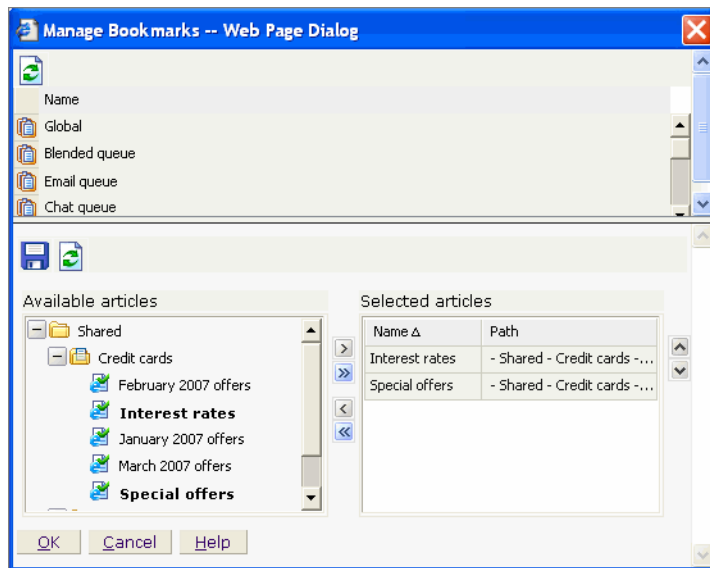
3. In the Manage Bookmarks window, do the following:

- 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



Suggestions

- ▶ [Managing Approval Processes](#)
- ▶ [Deleting Approval Processes](#)
- ▶ [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 that allows agents to contribute articles.

Managing Approval Processes

An article created from the Agent Console by an agent or from a web portal by a portal user 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.

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.



You can select from the list of standalone users and user groups, and IPTA integrated users, NIPTA integrated users, and NIPTA integrated user groups; however you cannot select IPTA integrated user groups. This means that multiple standalone users can be specified at one level by using a standalone group, but it is not possible to specify multiple integrated users at one level of the approval process.

Creating Approval Processes



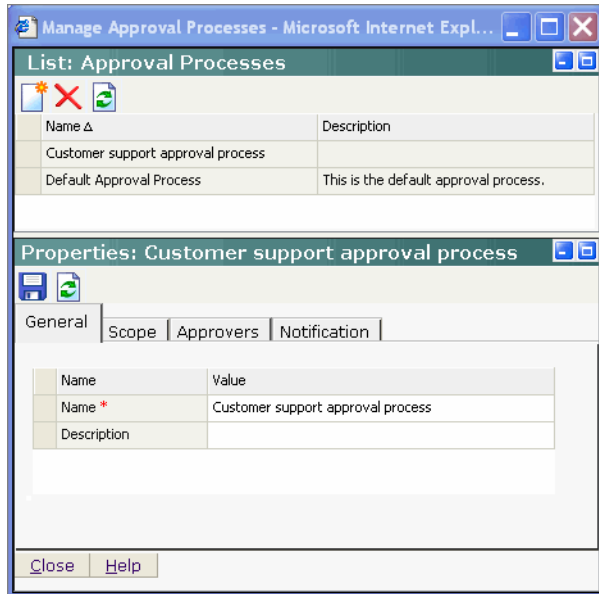
Important: Before creating an approval process, create the users who will be part of the process and the KB folders for which you want to set the approval process.

To create an approval process:

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

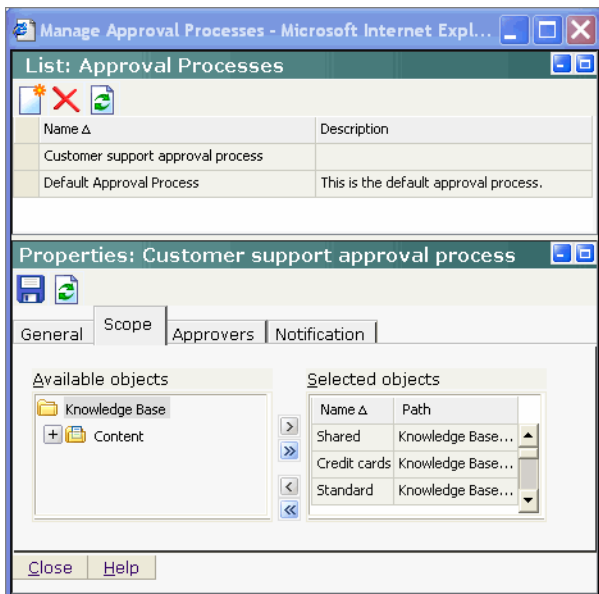
The Properties pane refreshes to show the attributes of the new approval process.

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

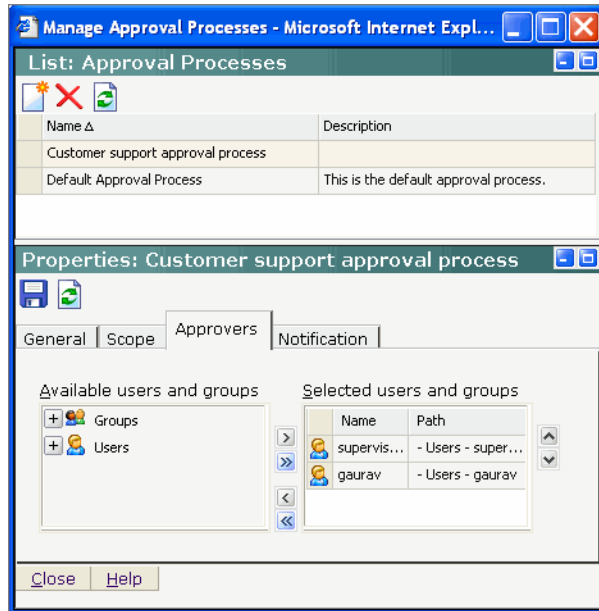
- Next, go the Scope tab and specify the folders to which the approval process will apply.



Configure scope of the approval process

- Now, go to the Approvers tab and specify the users and user groups who should approve articles in the folders selected in the Scope tab. You can select from standalone users and user groups, and IPTA integrated users, NIPTA integrated users, and NIPTA integrated user groups; however you cannot select IPTA 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 59.



Select approvers

7. Lastly, in the Notification tab set up notifications for the approval process. For more details, see “Setting up Notifications” on page 61.
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

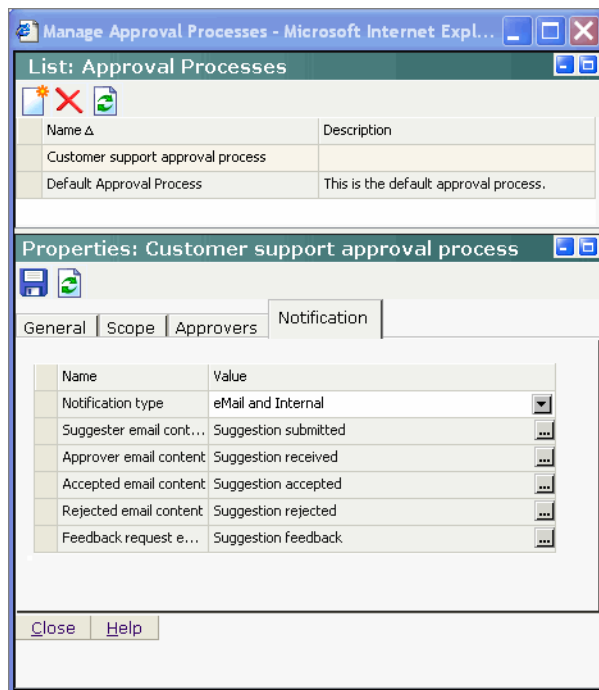
Notifications are messages and emails sent to internal users through the messaging infrastructure. You can send a notification when a suggestion is submitted, approved, rejected, or sent back with feedback.

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, 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 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, 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 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 **Suggestions** folder in the **Useful Items** 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.

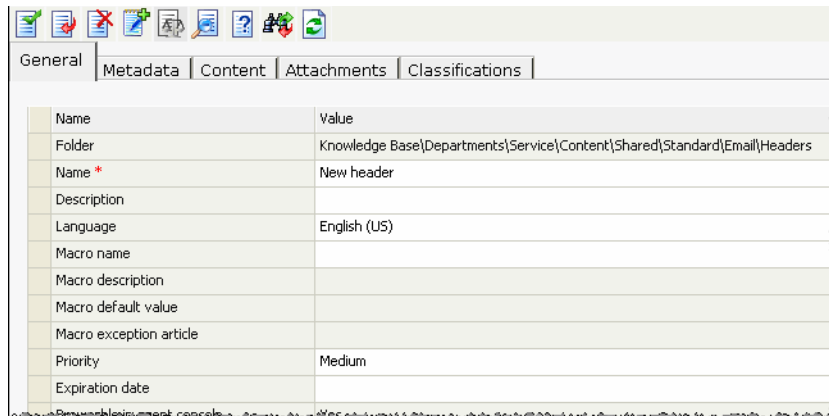
- ▶ You can approve the article. If you are the last approver in the approval process, the article becomes a part of the Knowledge Base and can be made available to agents. Before approving the article, you can make changes to the article. If there are other approvers after you, then the article is made 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 > 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 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 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 39](#).




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 the status of a suggested article

10

Article Rating

- ▶ [Rating Articles](#)


Rating Articles

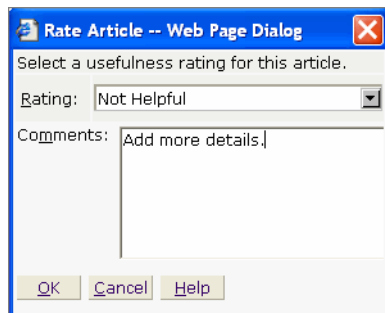
Authors can rate articles to denote their usefulness. A combination of these ratings and usage statistics then determine which articles are displayed in the **Most Popular Articles** sub-folder in the **Useful Items** folder. Currently, article ratings cannot be viewed from the user interface.



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**
 - **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 sub folders.


Printing Articles

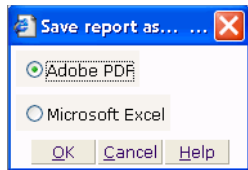
You can print articles directly from the KB Console. The print option also allows you to save an article in PDF or Excel format on your local machine. This feature allows you to print a single article or all articles in a KB folder.

To print a selected article:

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

The KB Article window appears. It shows the details of the articles 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 at the specified location. 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 sub folders in it, then all the articles in the sub folders are also printed.

To print all articles in a folder:

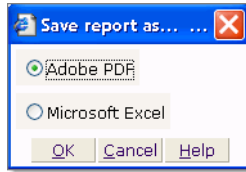
1. Select a folder in the Tree pane.
2. In the Tree pane toolbar, click the **Print preview**  button.

The 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**.



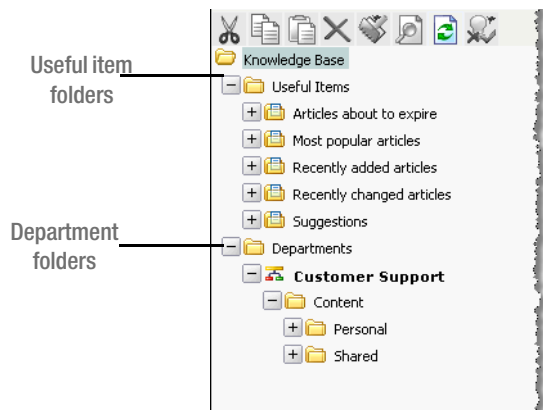
Select the format for saving contents of a folder

5. Click the **OK** button. Copies of the articles are saved at the specified location. 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 the 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 **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.

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 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.

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

Creating Useful Item Folders

You can create useful item folders, if you have permissions to perform the following actions:

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

Useful items folders can be created in one of the following ways:

- ▶ 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** and **Article List** tabs are enabled only after you select a method in the **General** tab.

The screenshot shows the 'General' tab of a configuration window. It has three sub-tabs: 'General', 'Criteria', and 'Article List'. The 'General' sub-tab is active. It contains a table with the following data:

Name	Value
Name *	Credit cards - all articles
Description	
Method *	Search criteria

Set the general properties

- 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 17](#).

The screenshot shows the 'Criteria' tab of the configuration window. It has three sub-tabs: 'General', 'Criteria', and 'Article List'. The 'Criteria' sub-tab is active. It contains the following fields and a table:

Object type: Look in: Search subfolders

Basic | Advanced | Relationships

Type	Attribute	Operator	Value	Boolean
Article	Department name	Contains		AND
Article	Name	Contains		AND
Article	Description	Contains		AND
Article	Keywords	Contains		AND
Article	Summary	Contains		AND
Article	Content	Contains	credit cards	AND
Article	Macro name	Contains		AND

Set the criteria for search

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

The screenshot shows the 'Article List' tab of the configuration window. It has three sub-tabs: 'General', 'Criteria', and 'Article List'. The 'Article List' sub-tab is active. It displays a table of search results:


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

- Click the **Save** button.

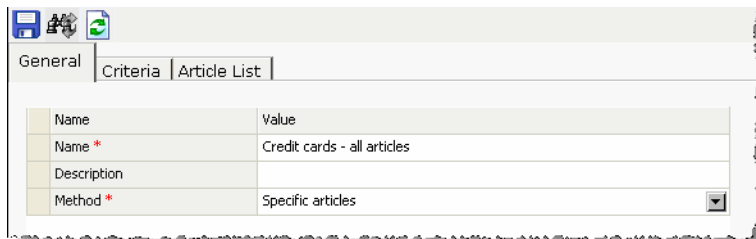
Creating Useful Items Folders by Selecting Articles

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



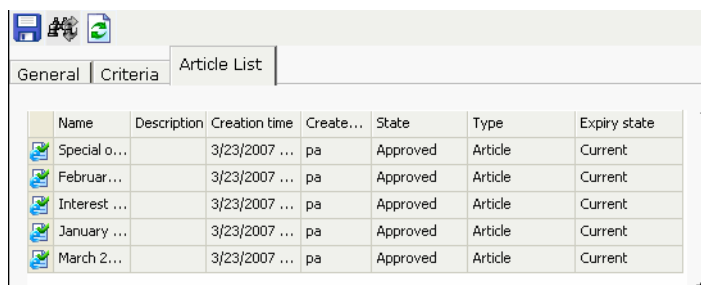
Set the general properties

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




View the list of selected articles

6. Click the **Save**  button.

Deleting Useful Items Folders

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

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.

Multilingual Content

- ▶ [Planning a Multilingual KB](#)
- ▶ [Getting Started](#)
- ▶ [Exporting Content for Translation](#)
- ▶ [Importing Translated 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. However, there are consequences when taking this decision. Maintenance of the knowledge base could become a problem, unless articles are stored in separate folders, each folder relevant to a specific language. 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.

Translation

Once information has been created within the knowledge base and it has been tested and proved to be working 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 83](#) 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 late, may mean that a project release date is compromised 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 responses to emails and if the contact centre is handling emails from different geographies in multiple languages, then equally it is important that any information used in response to an email, matches the language of the incoming email.

In general terms, most agents or users will be familiar with a single language. Thus, when these agents are configured, they will be assigned a default language. This language will be used to present a view of the knowledge base, specific to that language.

If an agent is bilingual or able to work with content in multiple languages, the agent can be defined with all of these languages. When the agent first logs in to the system, the knowledge base will load in his default language, but the agent will then have the ability to switch to another language, should the agent choose.

However workflows can only support the default language of the department. Thus any articles in the scope of a workflow will automatically contain the department primary language, not any of the translations.

Modifying Translations

When any changes are required to translations, there are two methods of applying these, depending on the number and nature of the changes involved.

1. For a large number of changes, such as global change or correction of terminology, it is better to make these within the latest XML import file, by asking the translator to make the changes and supply 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. For a smaller number of changes, such as correction of specific information or minor corrections, these can be made directly into the product itself. Be careful not to perform global changes via translation subsequent to this, because these small changes would then be overwritten by the global changes at the time of import. To allow for these 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).

Consequently, when these authors open the knowledge base for authoring, if the target language is their default language, the information will be presented in their target language, and thus these changes can be made directly into the knowledge base. Otherwise, they can toggle the language selector in the Knowledge Base console toolbar from their default to the target language, and then they can proceed and make these changes.

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.


Getting Started

Making Additional KB Languages Available in Departments

The first key decision is to determine the primary language of the knowledge base, or the initial language to work with in the knowledge base. This information is used at installation time to select the primary language defined to Unified EIM and WIM. This can be changed post install, but this is not a recommended approach if knowledge base content has already been defined, or if the knowledge base has already been translated.

The next decision is to determine the target languages in which the knowledge base will be available. If this is not known initially, these languages can be added individually as and when support is required.


To make KB languages available in departments:

1. Log in to 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. Dictionary support, used in spell-checking of content in articles and emails, is available in all supported languages except for Norwegian (Nynorsk).

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 primary language.

It is a good practice for a specific user to be assigned the owner of the knowledge base and this user (author) will create the parent KB folders. This author must be assigned the KB primary language as his 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. Consequently, he needs to be assigned specific user actions which are not default assignments - the administrator needs to assign Import Translation and Export Translation user actions to this author's user account before he has permissions 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 needs 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 is ready for translation it needs to be enabled for translation. Each KB folder has a property in the General tab of the object “Translate content”. By default this attribute value is **No** and needs to be changed to **Yes** for translation. For hierarchical structures such as KB folder trees, if you switch the attribute on the parent object, the application will prompt to propagate this change down all child nodes of the tree.

For details, see [“Content Folders” on page 23](#).

KB Objects Available for Translation

Once information has been created within the knowledge base and it has been tested and proved to be working 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 in the knowledge base.

#	Element name	Attribute name	Description	Available for translation
1.	eGainExportKBTranslation	iTargetLanguageId	Target language for translation.	No
2.	egpl_kb_folder	ild	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
		iAdditionalInfo	Additional information available for the article.	Yes
		iComment	Comments available for the article.	No
4.	iAttachmentList	iAttachmentList	List of attachments for the article.	No
		iAttachment	List of attachments for the article.	No

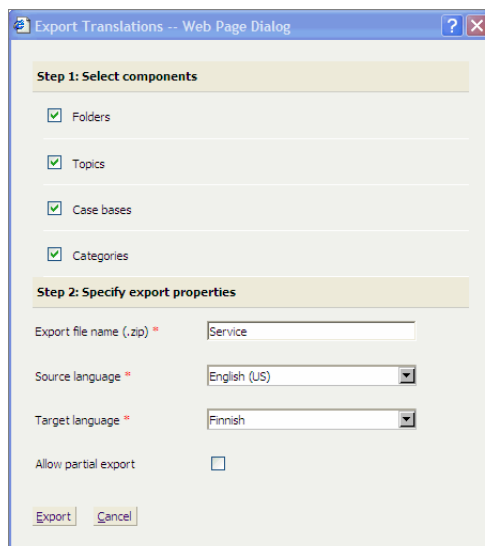
#	Element name	Attribute name	Description	Available for translation
5.	iAttachment	ild	ID of the attachment.	No
		iName	Name of the external attachment.	Yes
		iFilePath	Path of the attachment file.	Yes

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
 - 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, each folder specific to the target translation language, and each sub-folder specific to the date or the phase of the project.

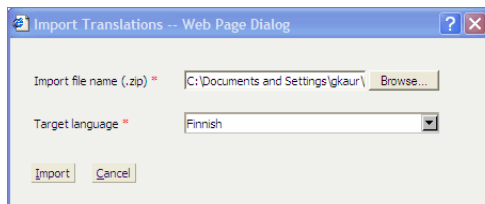
The content can now be sent for translation.

Importing Translated Content

Before starting the import process, 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