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

For Unified Contact Center Enterprise

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Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author’s Guide: For Unified Contact Center Enterprise. February 3, 2016

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Preface

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

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

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

About This Guide

Cisco Unified Web and E-Mail Interaction Manager Knowledge 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).

Obtaining Documentation and Submitting a Service Request

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

Subscribe to *What's New in Cisco Product Documentation*, which lists all new and revised Cisco technical documentation as an RSS feed and delivers content directly to your desktop using a reader application. The RSS feeds are a free service.

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We appreciate your comments.

Field Alerts and Field Notices

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

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

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

Document Conventions

This guide uses the following typographical conventions.

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

Document conventions

Other Learning Resources

Online Help

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

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

Online help options

Document Set

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

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

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

The document set contains the following guides:

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

User Guides for agents and supervisors

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

User guides for Knowledge Base managers and authors

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

User guides for administrators

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

1 Console Basics

- Key Terms and Concepts
- Related Actions, Roles, and Permissions
- Elements of the Console Interface
- Personalizing the System

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

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

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

Key Terms and Concepts

Knowledge Base tree and folders

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

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

Content node

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

Article

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

Article Type

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

Article Template

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

Bookmark

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

There are three types of bookmarks:

1. Global
2. Queue
3. Personal

Attachment

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

Versions

Authors can view earlier versions of articles.

Approval process

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

Knowledge workflows

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

Assigning languages

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

Related Actions, Roles, and Permissions

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

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

Author

An author is the writer of all the articles that agents can use as replies for customer queries. An author has access to the Knowledge Base Console, which is a store house for all company articles. The various actions assigned to the Author role are listed in the following table.

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

Actions assigned to the Author role

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

Resource Name	Actions Permitted
Knowledge Base	Import Translations, Export Translation
KB Folders	Reset Lock
Article Template	View, Create, Edit, Delete
Article Type Folder	View, Create, Edit, Delete
Knowledge Workflow	View, Create, Edit, Delete
Manage Stage	View, Create, Edit, Delete

Explicit actions for 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.

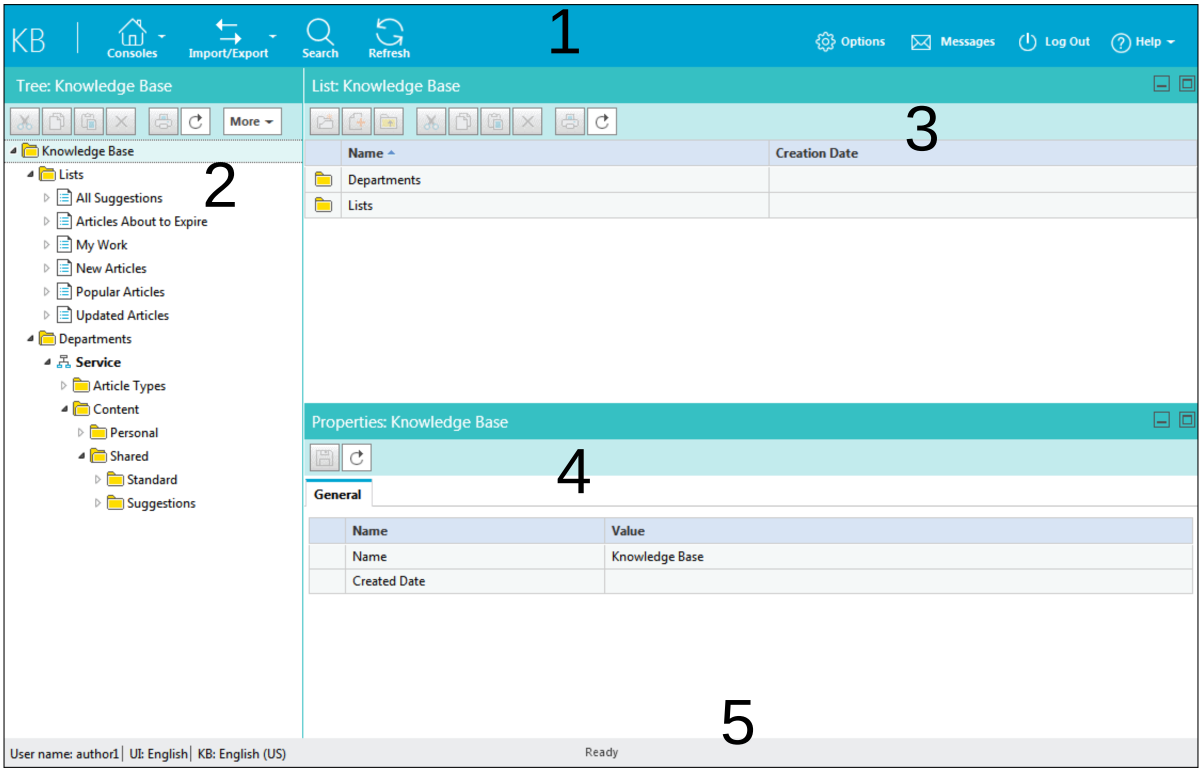
Permissions are used only for folders under the **Shared** node in the KB. Other folders in the KB tree are visible to all authors. Permissions for folders are inherited by sub folders.

- 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 button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.

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

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

5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:

   - The user name with which the user has logged in the system.

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

Personalizing the System

About Options and Settings

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

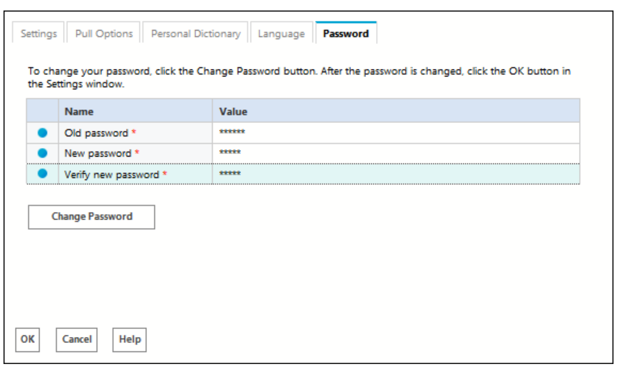
Important: **Changes made to options take effect on the next login. If you want the changed options to take effect immediately, you must log out of the system and log in again.**

Changing Your Password

To change your password:

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

   Click the **Change Password** button.



Change your password

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

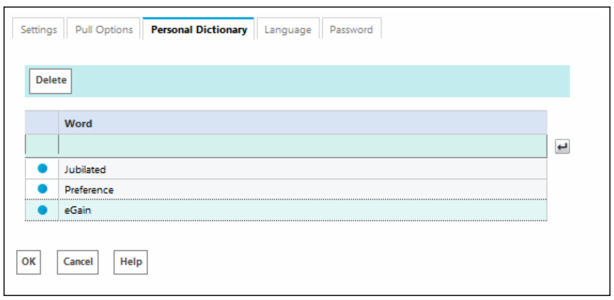
Modifying the Personal Dictionary

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

Adding Words to Personal Dictionary

To add words to your personal dictionary:

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



Add words to the personal dictionary

4. Click the **OK** button.

Deleting Words From Personal Dictionary

To delete words from your personal dictionary:

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

Changing the KB Language

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

To set the language:

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

Managing KB Defaults

Default settings for article types and article templates can be adjusted and reassigned through the Options menu. For more information see the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager's Guide*.

Changing Default Article Types and Templates

To change article type and template defaults:

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

2

Search for Information

- 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:

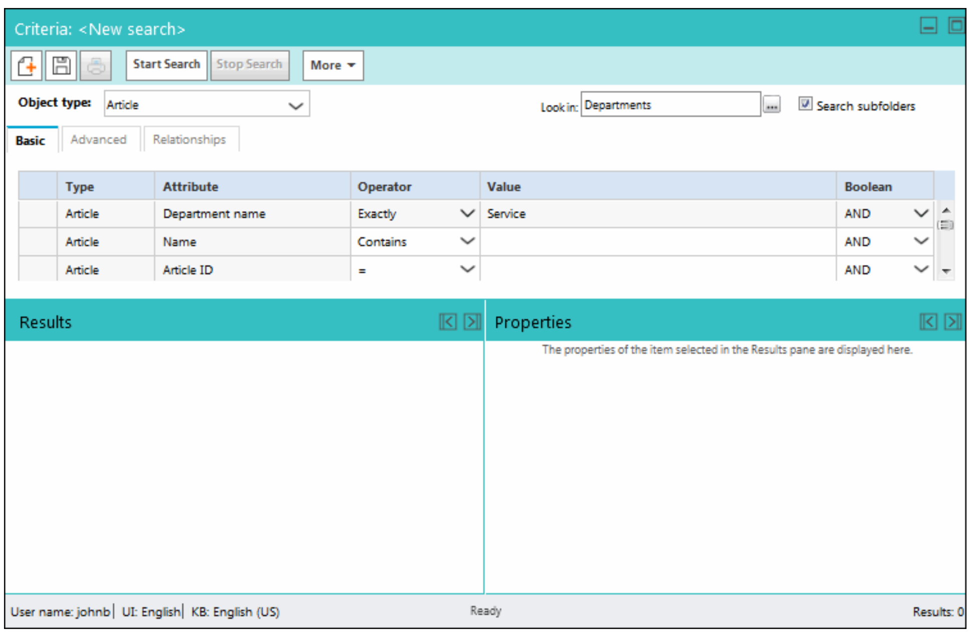
1. In the Knowledge Base Console toolbar, click the **Search** button.

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

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

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

Deleting Searches

If you want you can delete the searches.

To delete a search:

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

Saving Searches

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

To save a search:

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

Running Saved Searches

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

To open a saved search:

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

   The Search window appears.

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

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

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

Stopping Searches

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

To stop a search:

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

Creating a Search From Saved Searches

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

To create a search from a saved search:

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

   The Save Search As window appears.

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

   Click the **Save** button.

Locating Articles in the Console

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

To locate an article in the console:

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

Exporting Search Results

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

To export the search results:

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

Printing Search Results

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

To print search results:

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

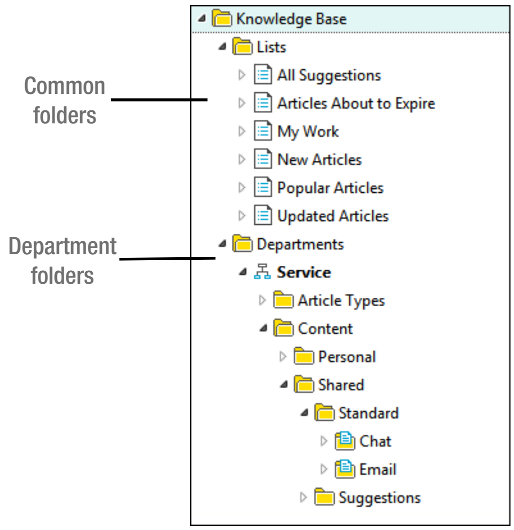
   The Print Preview for Search window appears. It shows the details of all the articles selected for printing.
3. In the Print Preview for Search window, click the **Save As** button. In the Save As window that appears, select the format in which you want to save the contents of the articles.

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

3 KB Tree and Folders

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

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



Folders in the KB Console Tree pane

Department Folders

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

Article Types

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

Content

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

Shared

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

The Shared folder contains the Standard folders.

Standard

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

The chat and email folders contain additional sub folders:

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

Suggestions

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

Personal

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

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

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

Managing Folders

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

Creating Folders

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

To create a folder:

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

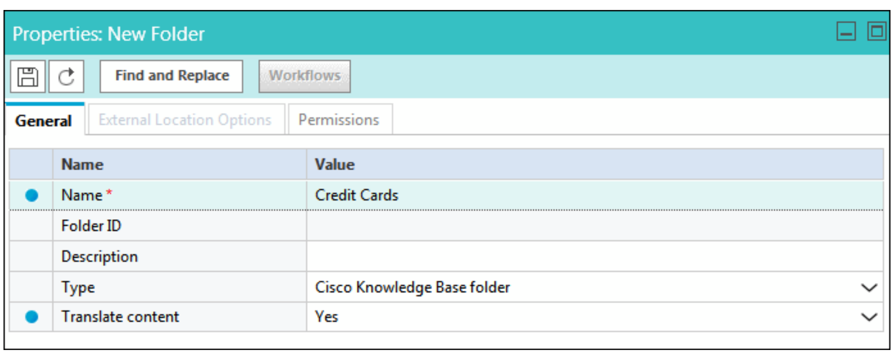
2. Select the folder in which you want to create a new folder.

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

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

4. In the Properties pane, go to the General tab and provide the following details.

   - **Name**: Type a name of the folder.
   - **Folder ID:** The unique ID of the folder. This is automatically provided.
   - **Description**: Type a brief description.
   - **Type**: Select the type as **Cisco Knowledge Base folder**.
   - **Translate:** Select **Yes** if you want the articles in this folder to be considered for translation when the content is exported for translation.

   Type general properties of the folder

5. Click the **Save** button. The new KB folder is created. Now you can create articles and sub folders in this folder. You can also give other users permissions to work in these folders. For more information, see “Assigning Permissions for Folders” on page 28.

6. Click the **Workflows** button to apply a knowledge workflow to the folder. You need the Knowledge Base Manager role to do this task. If this role is not assigned to you, you will see a read-only view of the workflows that are applied to the KB folder. For details see “Applying Knowledge Workflows” on page 54.

Assigning Permissions for Folders

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

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

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

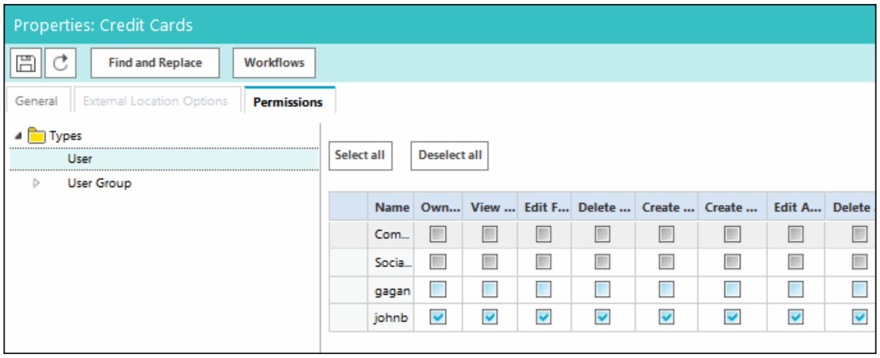
To assign permissions:

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

   You can assign permissions in two ways:

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

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



Set up access to a folder

4. Click the **Save** button.

Deleting Folders

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

To delete a folder:

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

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

Copying Folders

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

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

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

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

To create copies of a folder:

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

4 Article Content

- About Articles
- Creating Articles
- Deleting Articles
- Updating Articles
- Classifying Articles
- Working With Notes
- Creating Copies of Articles
- Managing Versions
- Requesting Article Locks
- Unlocking Articles
- Viewing Audit Details

About Articles

Content in the KB is created in the form of articles and organized so that they can be easily used while composing responses in the application.

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

Types of articles that can be created are:

- Personal articles: Agents can create articles for their personal reference.
- Standard articles: These are articles that server a specific purpose, depending on the channel for which they are created. For the email channel, headers, footers, signatures, and greetings make up the standard articles. For chat they are 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 is done from the Administration Console. Only the mapped quick responses and quick links are made available in the Chat pane of the Agent Console. All quick responses and quick links that an 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 in the Chat pane. However, the agent can always access it from the KB section of the Information pane.

Creating Articles

Articles are typically created from the Knowledge Base (KB) Console. The same article in available while handling multiple 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.

Articles can be in various stages of development, and you can easily tell their current status by the icons displayed in the article list pane.

The following table explains what each image represents.

Item	Description
Suggestion	Article is a suggestion and has to be approved before it can be published.
Draft	Article is a draft and not available for use.
Published	Article has a version that is published and available for use.
Expired	The expiry date of the published version of the article is in the past. The article is no longer visible in the Agent Console.
Locked	Article has been checked out by a user.
Scheduled	Article has been published, and is scheduled to become available on a certain day. Only articles that do not have a current published version can be scheduled.

The article content has the following parts:

- **Typed content**: This is the content that an author composes.
- **Macros**: Macros are shortcuts to other articles that are used to add content while creating a different article.
- **Internal File Attachment**: Local copies of the files are stored on the file server.
- **External File Attachment**: External file attachment points to a file available at a shared location.

Creating Content

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. If the system is configured to prompt users to select the **Article Type** and **Article Template** while creating new articles, you will see the New Article window, where you pick the type of article you are creating and the template you want to use for the article.

   Depending on how the system is setup, the list of article templates can be different for each article type. If your KB Manager has not configured any **Article Templates** for an **Article Type**, you can choose the **None** option and continue with creating the article. If article templates are available, you can select from the drop downs and perform the following in the New Article window before clicking **OK**:

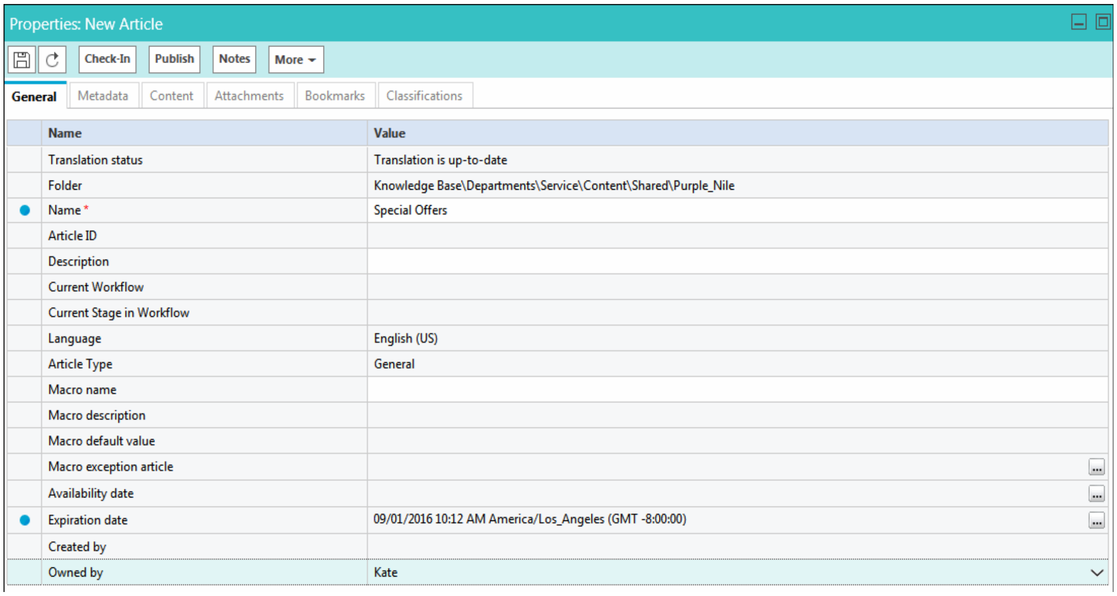
   - Choose the **Article Type** and **Article Template**
   - Click the **View** button to preview the Article Template.
   - Click the box next to “Set selected article type and template as default”.

The Content tab of the article is pre-filled with the contents of the article template. If you are not prompted to pick an article type and template, a **General** type of article with the default template (out-of-the-box name Blank Template) will be created. The article type and template of the article can be changed at a later point.

The Properties pane refreshes to show the attributes of the new article. This article is a draft and is not visible to any other user until it is checked in.

5. In the Properties pane, go to the General tab and provide the following details:
   - **Translation status**: This field tells you whether the translation is up to date or whether the content needs to be translated. This field is updated by the system.
   - **Folder**: It displays the path of the 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.
   - **Type:** Select the type as **Content**.
   - **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 60. 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.
   - **Availability date:** Select a date when the article should become available for use in the Agent Console and workflows. By default, the availability date is set as the date the article is created.
   - **Expiration date:** Select an expiration date for the article. If you want the article you are creating to become unavailable to users on a particular date, you can set an expiration date for the article. The article is automatically withdrawn on the given date. This can be used in cases where, for example, you have created an article about a special offer available to customers for a period of one month and wish to withdraw the article once the period has passed.

- **Created By:** Shows the name of the user who created the article.



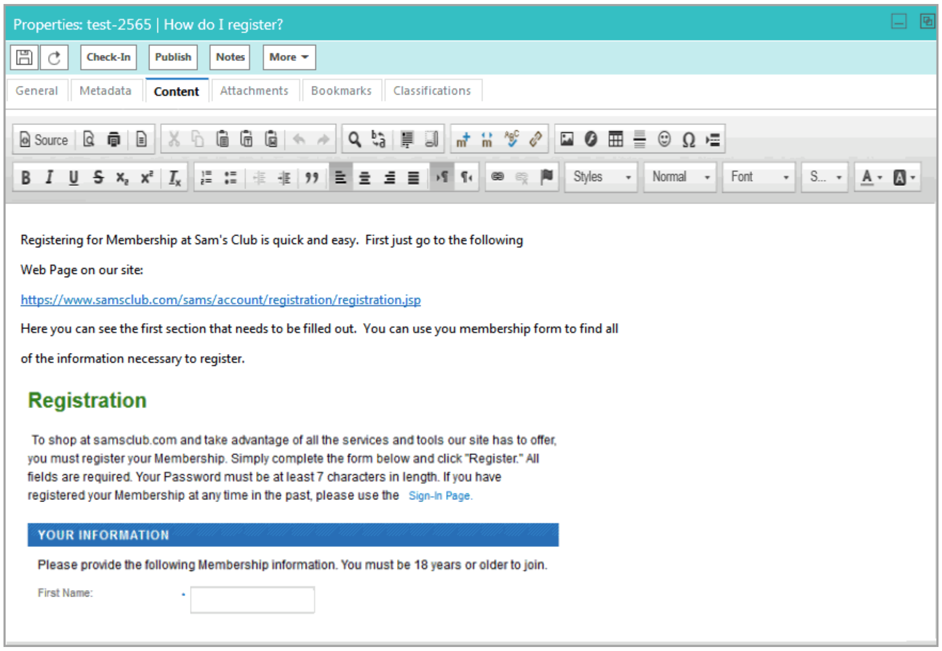
Set the general properties

6. Now, go to the Content tab and create the content of the article.

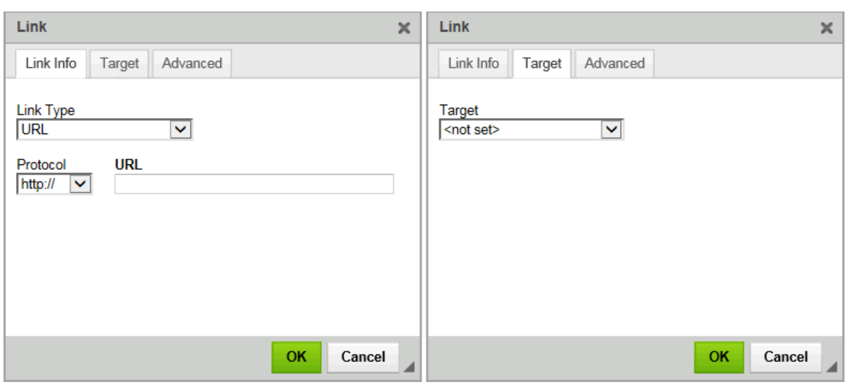
   a. Type the content of the article in the text box. All articles are HTML. To create pure text articles, do not use any rich text formatting while creating content. You can use the various formatting tools available to format the article content. You can also add hyperlinks to the HTML type articles.

      When you are creating quick responses and quick links, remember that the content is displayed in plain text when agents use the quick responses and quick links during a chat session. 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



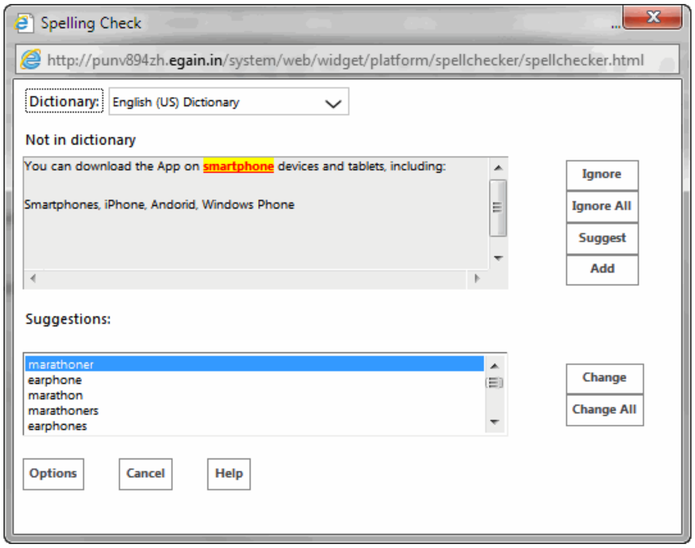
b. To add hyperlinks to the article content, click the **Insert Hyperlink** button in the Text box toolbar and in the Link window, enter the details of the hyperlink you want to add. You can also specify a target for how the content should open (same window, new window, etc.), and configure advanced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



Configure the link

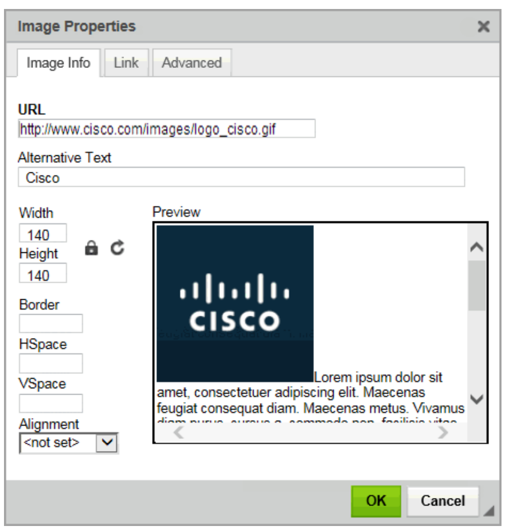
After creating content, you can run the spell-checker on the content.

c. 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.



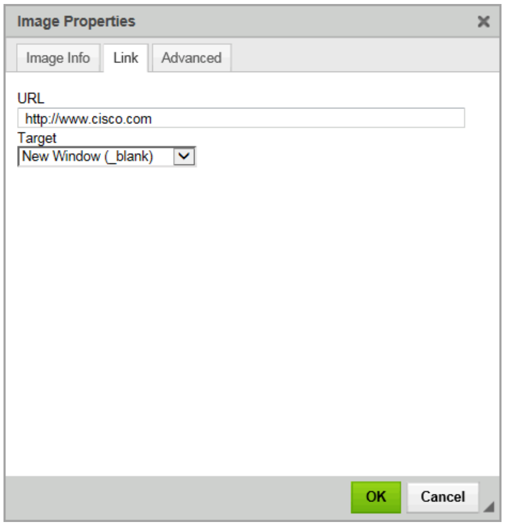
Run the spelling checker

d. To insert an image from an external location, click the **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.



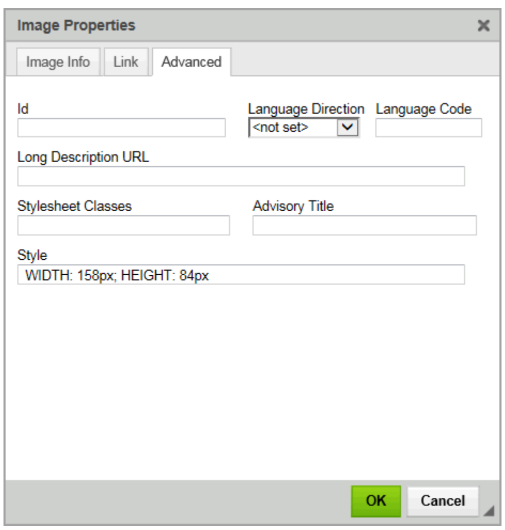
Type the URL of the image

To specify a URL that should be launched when the user clicks the image, click the Link tab and enter the required information.



Type the URL to be launched from the image

Use the Advanced tab to specify additional details such as long URL, language, etc.



e. *Configure advanced options*

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, point to **More** and select **Preview article**. The Preview Article window appears. Here you can preview the content and attachments of the article.

7. In the Metadata tab, specify the metadata for the article. For details, see "Metadata" on page 56.

8. In the Attachments tab, attach external and internal attachments to the article. For details, see "Attachments" on page 51.

9. In the Bookmarks tab, bookmark the article for queues or globally. For details, see the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Manager's Guide.*

10. In the Classifications tab, assign categories and resolution codes to the article. For details, see "Classifying Articles" on page 43.

11. Click the **Save** button. The list pane updates to display the Locked state for this article. The Properties pane refreshes to show the Article ID and Article Name in the title.

    If you are done working on the article for the moment, click the **Check-In** button. This allows other users to check out the article and make edits to it, but does not make it available for use in the Agent Console. The list pane updates to display the Draft state for this article.

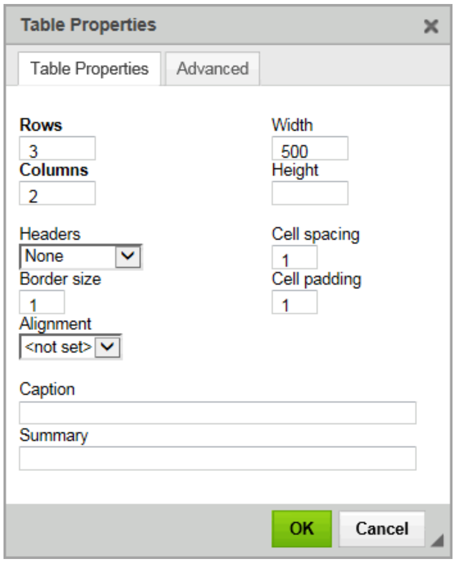
    To make the article available for use, click the **Publish** button. The list pane updates to display the Published state for this article. For articles with an availability date, clicking the **Publish** button schedules it for publishing. The list pane displays the Scheduled state for the article. Publishing the article automatically checks it in and removes your lock on it.

Inserting Tables in Articles

While creating articles, you can add tables to display and organize data in rows and columns

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 click the **Table** button.
4. In the Table Properties window provide the following details about the table:
    - **Rows:** Type the number of rows.
    - **Columns:** Type the number of columns.
    - **Width:** Specify the width of the table in pixels.
    - **Height:** Specify the width of the table in pixels.
    - **Headers**: Choose from None, First Row, First Column, or Both
    - **Border size:** Specify the width, in pixels, of the table's borders.
    - **Alignment:** Set the alignment of the table. The options available are - Left, Right, or Middle.
    - **Cell spacing**: Specify the space between table cells in pixels.
    - **Cell padding**: Specify the amount of space between the contents of the cell and the cell wall in pixels.
    - **Caption**: Add a caption for the table. This is displayed above the table.
    - **Summary**: Add a summary that can be read by screen readers. The summary is not displayed anywhere.



Specify table properties

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

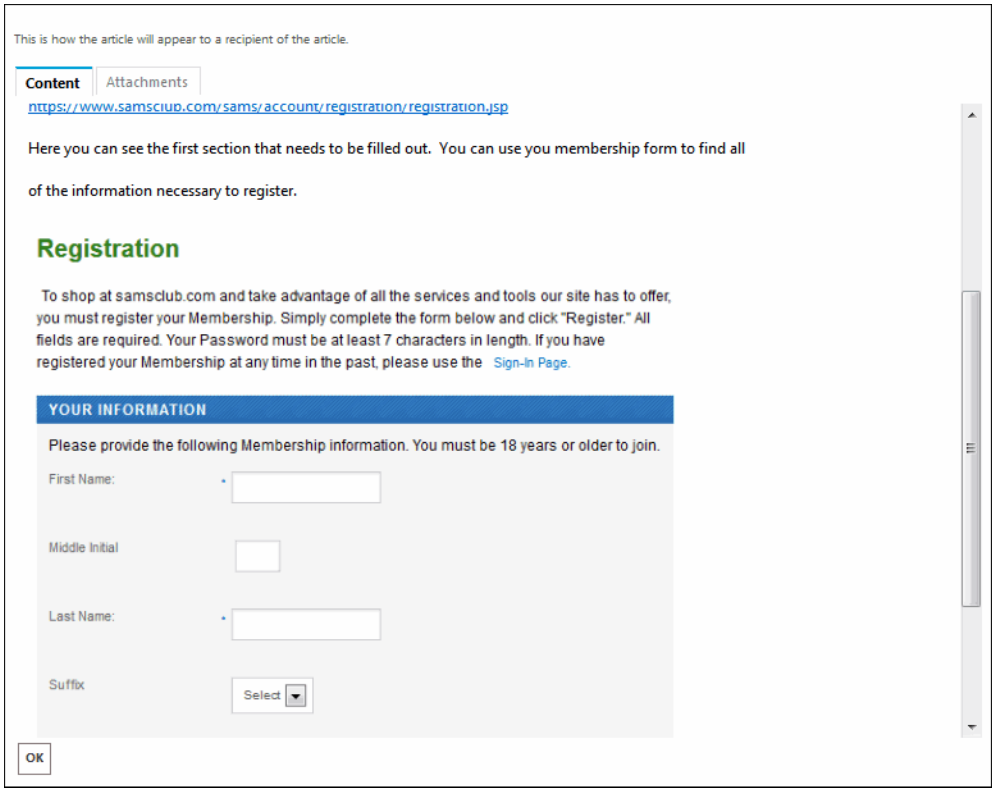
Previewing Content

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 permission to delete 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. You must check and article out before you update it. 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.

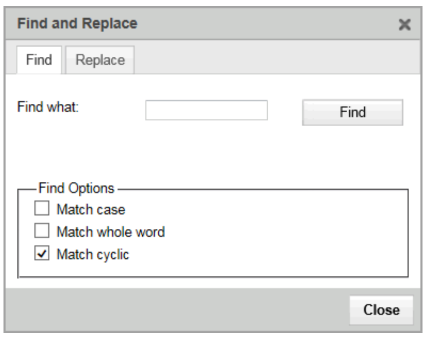
     For example, you want to replace the word *invest* in an article, and the article contains words *invest, investment, investing* , and *invested.* If you select this option, it will replace only the word *invest*. If you don't select this option, it will replace the word *invest* in all the words - *invest, investing, invested,* and *investment.*
   - **Unattended replace:** This option is enabled only when the scope of search is more that 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.

Important: The Find and Replace operation restricts itself to articles that you have checked out. If you see the "No article matched the search" message in error, check to make sure that all the articles have been checked out.

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

Classifying Articles

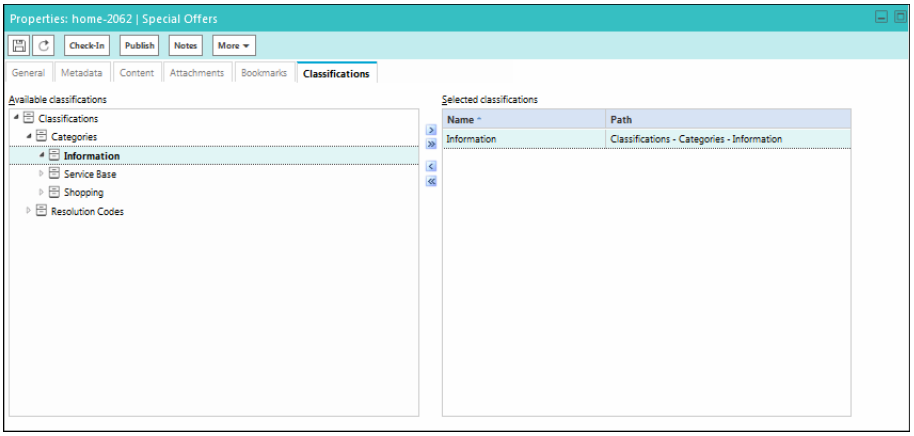
Classifications are used by the system to efficiently organize all the articles according to any specific feature. When such articles are used in activities and responses, they too get classified in the same group. The system provides you with two classification tools, categories and resolution codes.

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

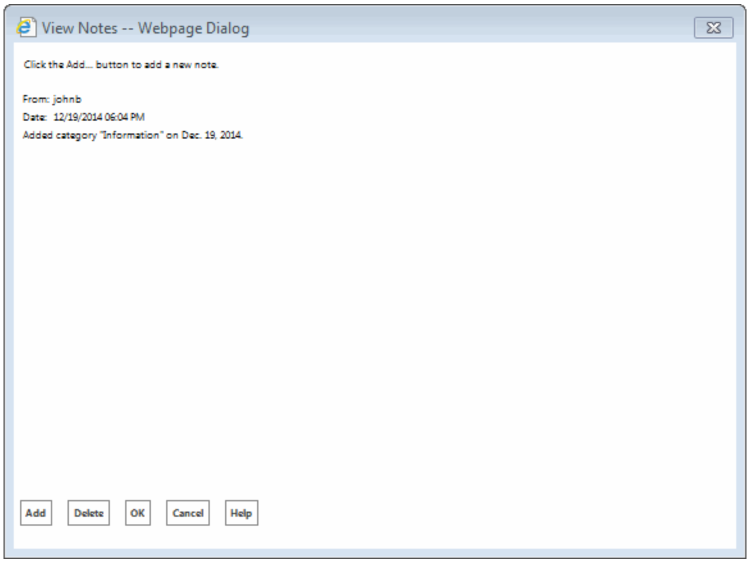
Notes can be added to articles for internal usage. Use notes to convey specific comments and to share tips and information with co-authors. Notes play a very important part in the approval process. You can use them to convey any special comments to approvers of next level and also while sending back articles for modifications to agents. For more details on the approval process, see the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide*.

Adding Notes

To add a note:

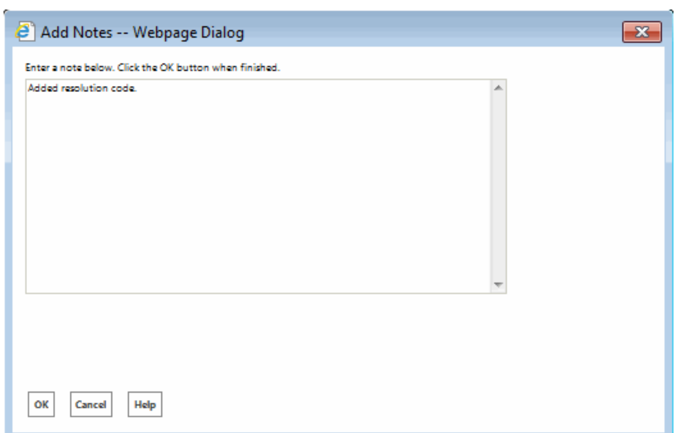
1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Content.**
2. Select the article to which you want to add a note.
3. In the Properties pane toolbar, point to **More** and select **Notes**.

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, point to **More** and select **Notes**.

   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.

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.

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

- When an article is moved from one folder to another, the workflow of the new folder applies to the article. If both folders have the same workflows, the article retains it's stage. If the workflow changes, the article is sent back to Draft stage and is processed by the new workflow.
- Copied articles are always in draft stage.

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.

Managing Versions

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

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

If you decide you like an older version of an article better, you can revert back to that version. When an article is deleted, all its versions are deleted automatically.

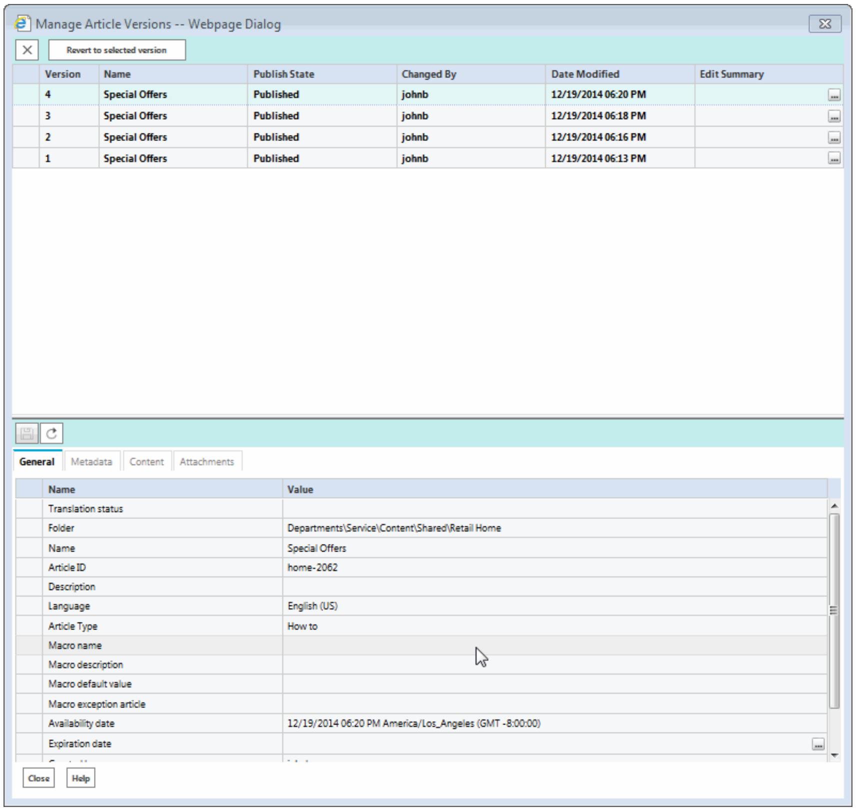
Viewing Versions

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, point to **More** and select **Manage Versions**.

   The Manage 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 cannot 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 is not available for them.



View older versions of an article

Editing the Summary of Article Version

To edit the summary of an article version:

1. In the Manage Article Versions window, select the article version for which you want to add or edit the summary.
2. In the Edit Summary column, click the Assistance button.

The Edit Summary window appears. Enter a summary (up to a maximum of 255 characters) and press OK.

Revert to a Previous Article Version

To revert to a previous article version:

1. In the Manage Article Versions window, select the article version you wish to revert to.
2. Select the article for which you want to view the versions.

3. Click the **Revert to selected version** button. This automatically checks the article out, and reverts it to the selected version. If the previous article version had not been published, it's Publish State is updated to Abandoned.

   You can now edit, check-in, or publish the article.

Requesting Article Locks

If you wish to edit an article that another user has checked-out and hence locked, you may request the lock on that article.

To request a lock:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Department Name* **> Content**.
2. Select the article you wish to edit, but is currently checked out by another user.
3. Click the **Request Lock** button in the properties pane.

   This sends a message to the user who has checked out the article, requesting her to check it back in. A message is also sent to everyone with the **Reset Lock** action, requesting them to reset the lock.

   Once the user who locked the article checks the article back in, a message is sent to the user requesting the lock, as well as anyone with the **Reset Lock** action, informing them that the article has been checked in.

Unlocking Articles

Administrators and users with the **Reset Lock** action have the ability to reset locks on articles that are currently checked out by another user.

To reset a lock:

1. In the Tree pane, browse to **Knowledge Base > Departments >** *Department Name* **> Content.**
2. Select the article for which wish to reset the lock.
3. Click the **Reset Lock** button in the properties pane.

   If you are prompted for it, enter a reason for resetting the lock and click OK.

   This message is sent to the user who had checked out the article, and thus locked it. Other users can now check the article out and edit it. Keep in mind that resetting the article will not change its state—it will remain in a draft state until it is published.

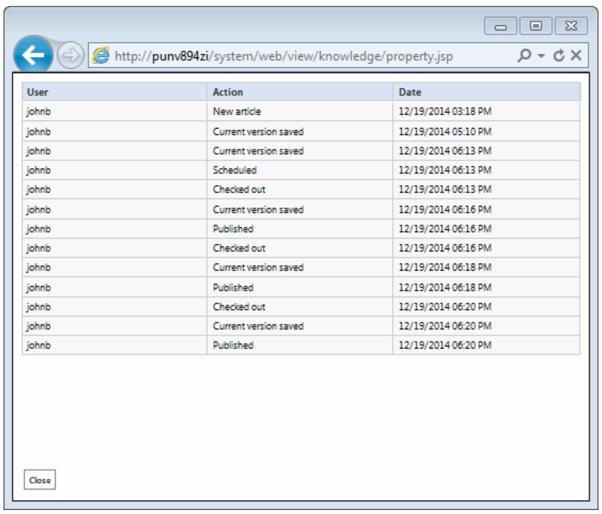
Viewing Audit Details

An audit trail of all the action taken on an article is available from the Properties pane.

To view audit details 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 audit trail.
3. In the Properties pane toolbar, point to **More** and select Article Audit Details.

   The Article audit details window appears. Here you can see a list of all the actions performed on this article, along with the name of the user who performed the action, and the date and time at which the action was performed.



Article audit details

5

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 copy of the file is stored in the database 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 attachments larger than 10 MB per file.**

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:

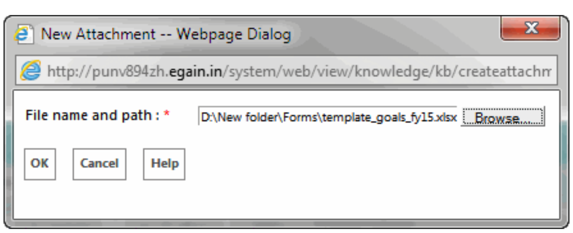
- The attachment content cannot be modified. It can only be viewed.
- More than one file can be added as an internal attachment.

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

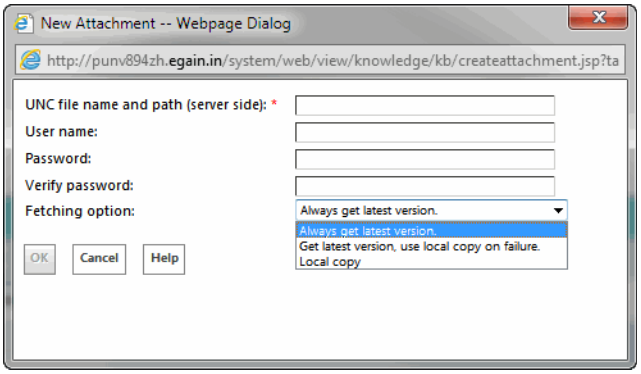
To attach an external file to an article:

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.
   - **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.
     - **Always get latest version:** The system gets the latest file from the external location every time the article is used.
     - **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.

- **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:

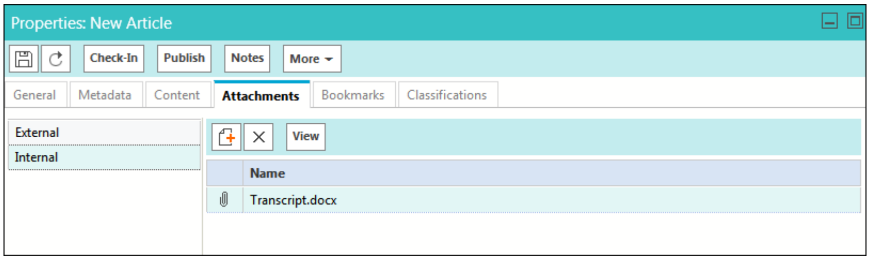
1. In the Tree pane, browse to **Knowledge Base > Departments >** *Your Department* **> Content.**
2. Select an article in the List pane.
3. In the Properties pane, go to the Attachments tab.
4. Go to the Internal or External section and select the attachment you want to delete.
5. Click the **Delete**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

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



Select an attachment

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

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

6 Metadata

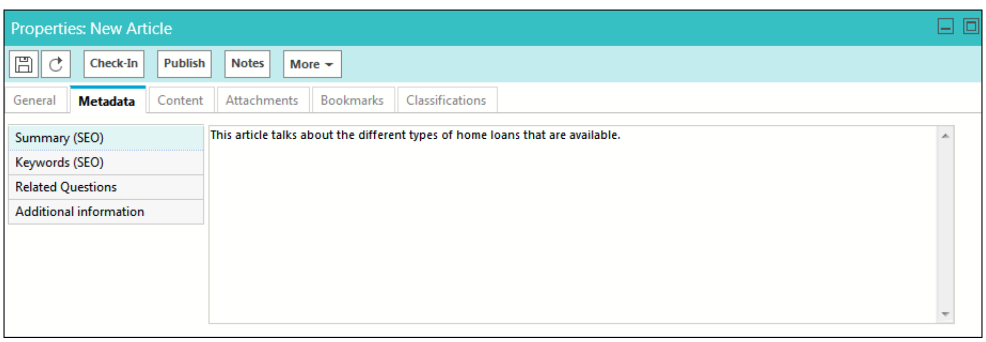
Adding Metadata

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

- **Summary:** The summary of the article can be a one-line review of the content of the article.
- **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, SUV, Sports Utility Vehicle, 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 the wrong results while searching.
- **Related questions:** This is a list of possible questions that can be asked for the article.
- **Additional information:** This is additional information for the article.

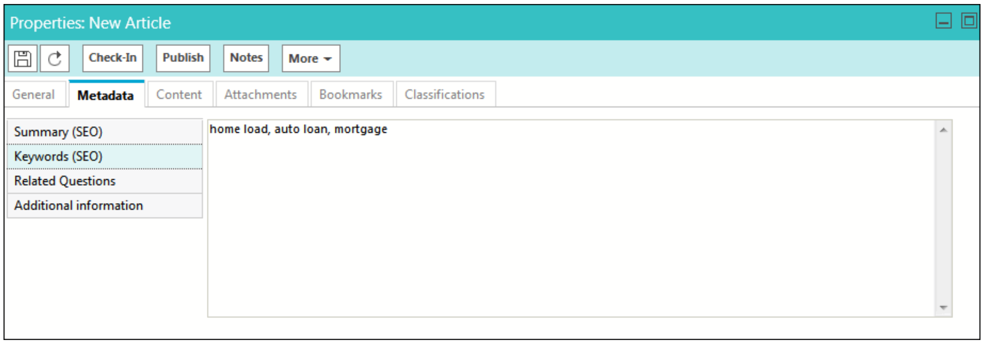
To add metadata to an article:

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.



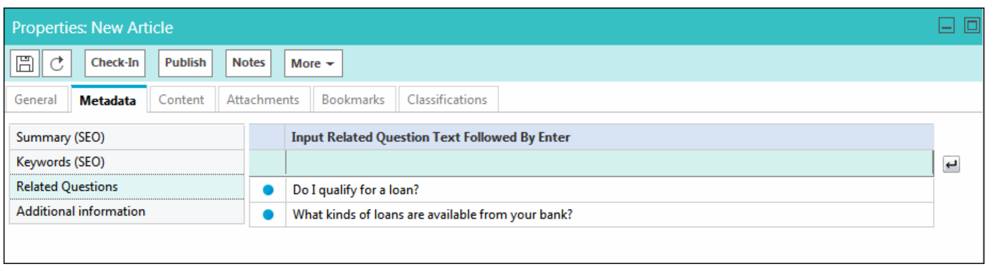
Provide a summary of the article

5. Next, go to the Keywords section and specify the keywords for the article. Keywords are used by search to improve search results. The keywords should be separated using commas.



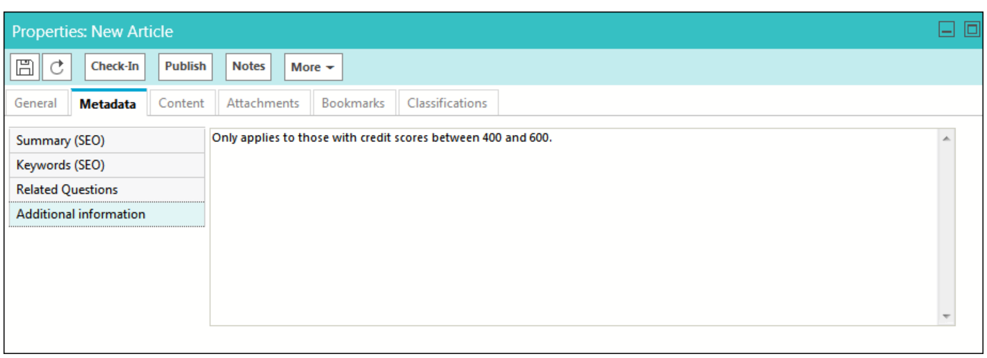
Provide keywords of the article

6. Next, go to the Related Questions section, and in the text box provide the related question for the article and press Enter. These are different ways in which customers may phrase questions that can be answered with this article. You can add multiple questions.



Provide related questions for the article

7. Next, go to the Additional information section, and in the text box provide any additional information for the article.



Provide additional information for the article

8. Click the **Save** button.

7 Macros

About Macros

Macros are shortcuts that are assigned to articles. 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: < ` , . ? : ; & " ' !**

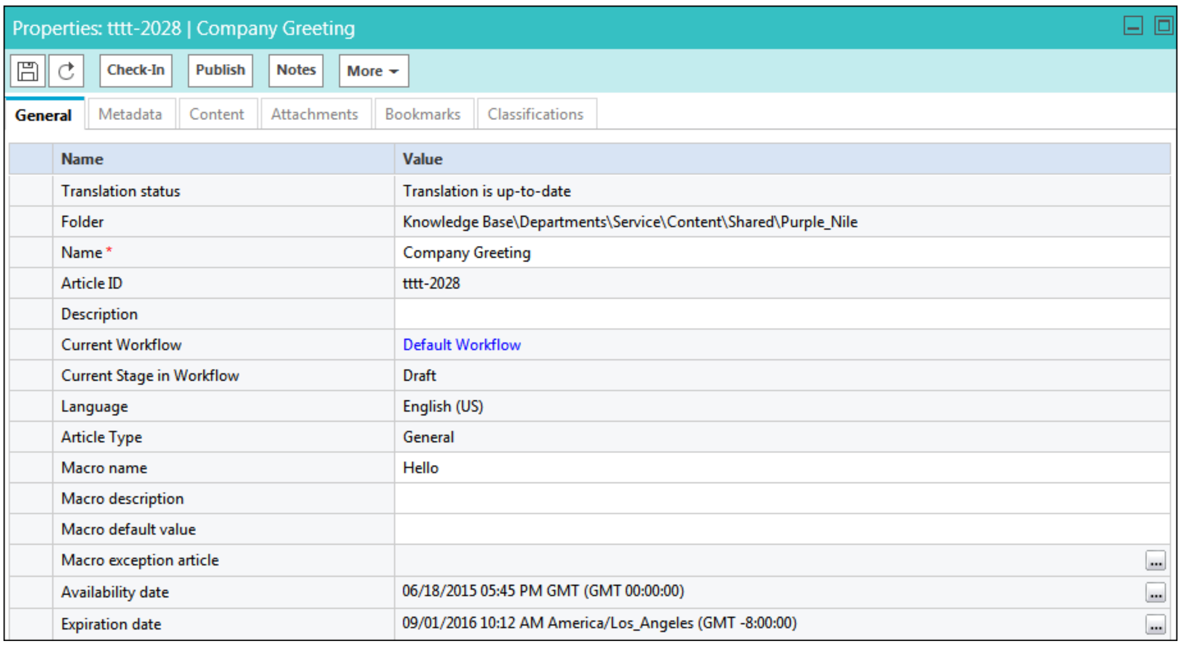
Creating Macros for Articles

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 60.

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.

8

Article Rating

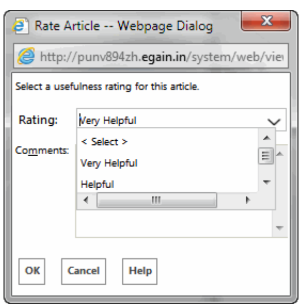
Rating Articles

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

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, point to **More** and select **Rate article**.
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 the article

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

9 Printing

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

Printing Articles

Printing From the Text Editor

To print the content of an article:

1. In the Properties pane, select the Content tab.
2. In the Text box toolbar, click the **Print** button.

   The Windows Print window appears.
3. Select a printer, set print properties, and click **Print**.

Printing From the List Pane

The print option from the List pane also allows you to save an article in PDF or Excel format on your local machine.

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.**
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.**

5. Click the **OK** button. Copies of the articles are saved at the specified location. Print as many hard copies as you want.