Configuring Personalization

About Personalization

Personalization is a feature designed to tailor content on your knowledge portal to various subsets of your audience. It can be used to give priority users or partners access to internal content, or provide simpler and more explicitly detailed information to new users, such as recent hires. It can also be used to create clearer divides between the information available to different teams or departments.

For example, knowledge articles related to finances, billing, and accounts, can be personalized to only be viewed by members of the finance team, while articles related to the maintenance and upkeep of critical network systems and servers can be made exclusive to the organization's IT or security team. This allows your organization to maintain only one knowledge base, while providing users knowledge content that is directly relevant to them.

The possibilities available to systems with personalization are numerous. With a bit of planning and some careful forethought, deployments using personalization can allow authors and knowledge managers to provide exactly the right information to those that need it most, in a way that's both efficient and easy.

Setting up Personalization

One of the benefits of personalization is that you can start small and then grow from there, adding to your personalization base organically as your knowledge base develops. Before you begin building, however, there are a few things you might wish to consider.

Should I Personalize?

There are situations where adding personalization may not be necessary or efficient. If there is no overlap between your audiences or your content, then personalization may bring unnecessary complexity. You may also wish to consider whether personalization is the most suitable method for making your knowledge content more efficient.

In cases where the application already supports features that can perform an intended use case better, for example, displaying multi-lingual content, or restricting user access along department lines, it might be better to display the content using additional portals or articles, rather than personalization. Another example of when not to personalize is when an organization has a variety of brands, where the use of multiple portals may be much more efficient than personalizing.

Identifying the Audience

One of the keys to setting up your personalized knowledge content is to identify as many audience subsections as possible. A few questions you may wish to ask before beginning include:

- What is my largest audience base?
- What ratio of your audience is internal to the organization, and what ratio is external?
- Are there any partners or shareholders that may view these communications and if so, how should that information be presented?
- Are there different cultures or demographics that expect communication on specific subjects or formats?

Identifying the audiences can help you choose a starting point when you begin to build your personalization base.

Defining Resources

Define the resources that are available for creating, managing, and delivering personalized content. It is good to have an idea of how many knowledge managers, authors, and agents are, or will be, available to you when you choose to develop personalized content.

Single Sourcing for Authors

Single sourcing is the creation of multiple articles using one. This is done by generating multiple versions of an article based on content tagging and publish view application. Single sourcing is a way to hide or display sections of content for specific audiences.

Single sourcing can reduce the time and effort needed to maintain your knowledge content, while streamlining the content creation process by allowing authors to create and maintain multiple pieces of content at the same time. Single sourcing requires the use of publish views and content tagging. For more information, see Publish Views and Content Tagging.

Before Single sourcing

Before single sourcing any article, it may be beneficial to consider the following questions:

- Is there significant overlap in content for two or more distinct audiences? Articles should not be single-sourced using personalization unless there is an overlap of 60% or more in content. For example, an article on How to send a text message? for several smartphones would have overlapping content, but be intended for different audiences.
- Is there extra content that only a part of your audience should see? For example, an article could be written to contain sections of content intended for agents. Such information can be made exclusive to agents using personalization, preventing customers from viewing it.
- Are the self-service portals structured to allow for Single sourcing? For example, if the Knowledge Console has been set up with one portal for each audience, Single sourcing may not be the most suitable method for content delivery.
- Is there a pre-existing application feature that can perform the function of Single sourcing better? For example, the application has multilingual features that assist with translation of content into different languages. Rather than Single sourcing an article for different languages, it would perhaps be better to take advantage of the multilingual features.

Why Single Source?

There are a number of aspects of single sourcing that make it an excellent way of creating and delivering content.

Single sourcing can:

- Hide information.

- Display or highlight specific sections of information.
- Greatly reduce the effort needed to maintain the knowledge base.
- Greatly speed up the content creation process.

Though single sourcing is a useful tool, it is important to understand a few things that single sourcing should not be used for:

- Single sourcing should not be used to create articles that do not overlap in their subject matter.
- Single sourcing should not be used to create articles intended for the same audience.
- Single sourcing should not be used if it would be easier to create multiple articles.

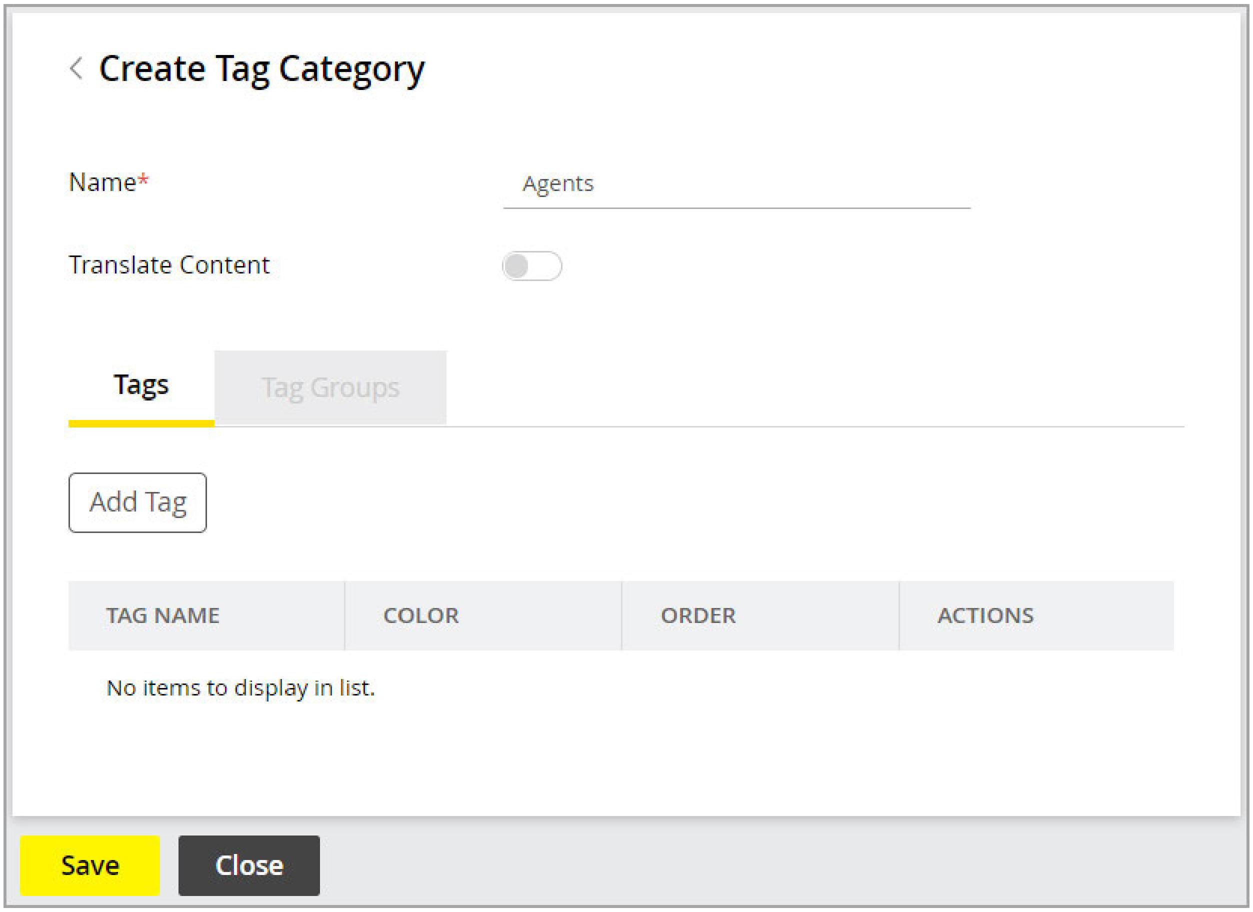
Tag Categories

Tag categories are an organizational tool for tags and tag groups that help to distinguish between different tag types. Tag categories are at the highest level of the tag structure and contain both tag groups and tags. They primarily serve an organizational purpose and are also visual indicators that can differentiate between tags that have similar names. When assigning tags to articles, tags are sorted by tag category.

Creating Tag Categories

To create a tag category:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Tag Categories**.
4. In the List page toolbar, click the **New** + button.
5. In the Properties page, set the following:
   - **Name:** Provide the name for the tag category. The name cannot be longer than 100 characters.
   - **Translate Content:** Click the **Toggle** button if you want this category and the tags contained within to be considered for translation when the content is exported for translation.



6. Click the **Save** button.

Deleting Tag Categories

Tag Categories cannot be deleted while in use.

To delete tag categories:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Tag Categories**.
4. Click the **Delete** button.
5. A message appears asking to confirm the deletion. Click **Yes** to delete the tag category.

Tags

Tags are at the root of every personalization capability. A tag is an application object created in the Administration Console that is used for every aspect of personalization. Essentially, they are labels and, when applied to an object, restrict or permit access to content using match behavior. If an article possesses a tag, users cannot see the article until they too possess that tag in the form of a user profile.

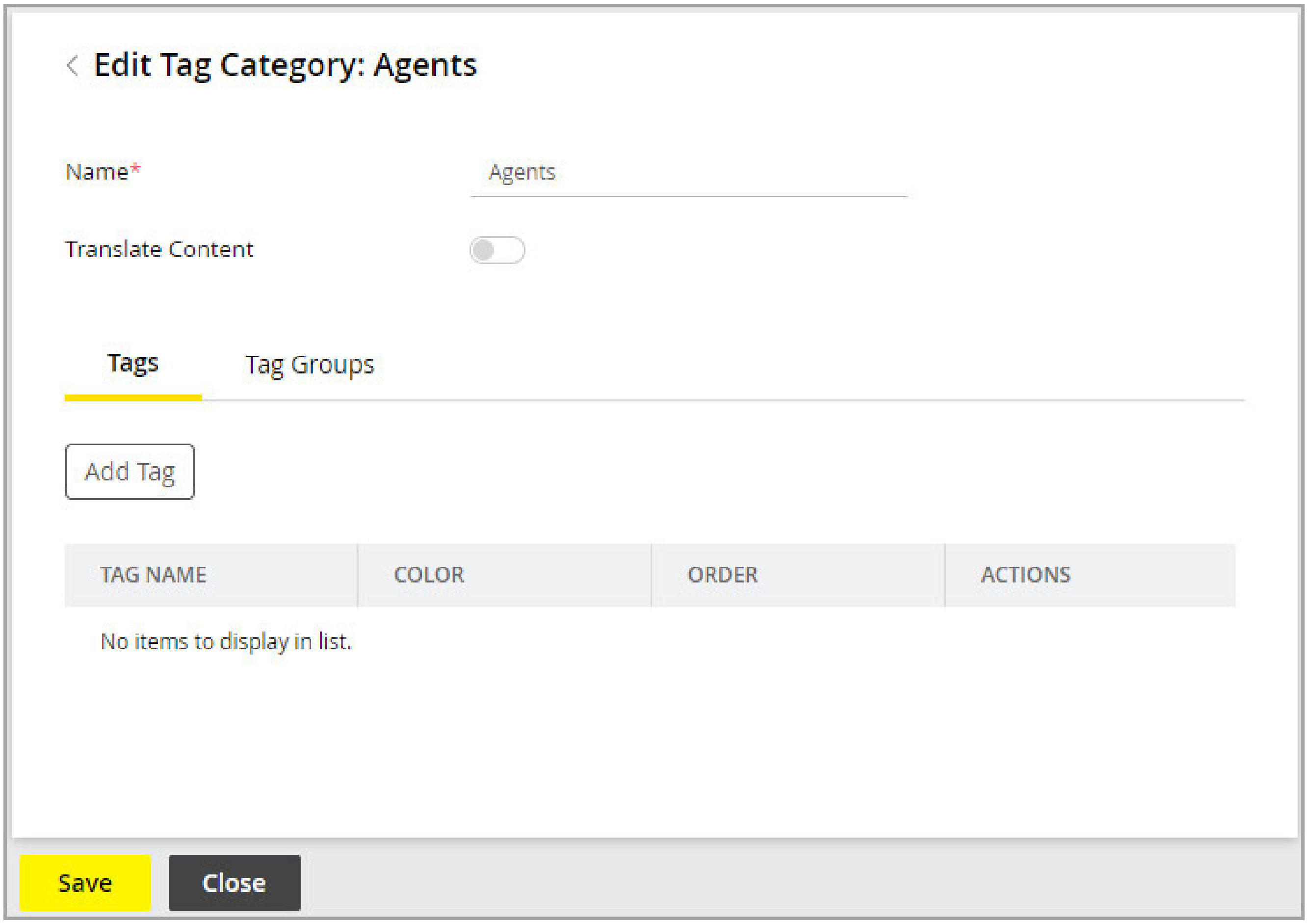
To illustrate further, the structure of Personalization allows the tags created in a tag category to act as both the locks and the keys to articles and how they are viewed. Tags act as:

- **Access tags:** Tags applied to an article as access tags gate view access on the article. For more details, see Access Tags.
- **Filters:** Tags applied to an article as filters act as methods of reducing the total number of search results on a self-service portal. For more details, see Filter Tags.
- **Part of a user profile:** Tags applied to a user profile directly correlate to how access tags are applied to articles. Tags in a user profile must match up with the access tags of an article in order for the user to view the said article. For more details, see User Profiles.
- **Part of a publish view:** Tags applied to a publish view determine how an article that has been single sourced appears in the portal to users with the necessary user profiles. For more details, see Publish Views.

Creating Tags

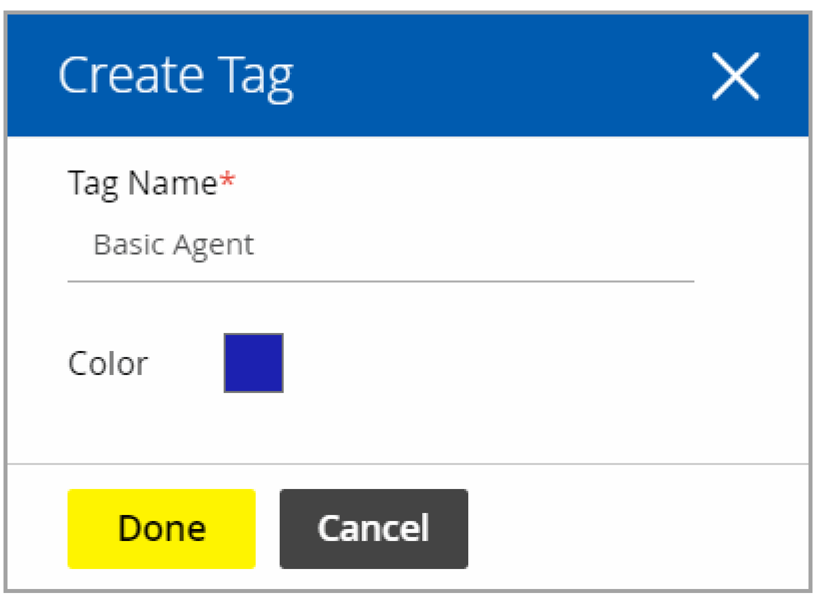
To create a tag:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Tag Categories**.
4. In the List page, select a tag category.
5. In the Properties page, on the Tags tab, click the **Add Tag** button.



6. In the Create Tag window, provide the following details:

   - **Tag Name:** Type a name for the tag.
   - **Color:** Click the field and select a color from the palette. Colors help authors identify tagged content in articles during article creation. If the tag is only meant to apply to the entire articles and not to specific sections of the article, then color is unnecessary.



7. Click the **Done** button to add it to the list of tags for this category.

8. Use the Order column to control and rearrange the order of tags for this category.
9. Click the **Save** button.

Deleting Tags from Tag Categories

Tags cannot be deleted while in use.

To delete tags from tag categories:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Tag Categories**.
4. In the List page, select a tag category.
5. Identify the tag you want to delete.
6. From the Actions column, click the **Options** ... button.
7. Select **Delete** from the menu.
8. A message appears asking to confirm the deletion. Click **Yes** to delete the tag.

Tag Groups

Tag groups are a secondary organization method for tags that also possess limited functionality as tags. A tag group has the advantage of being dynamic and inclusive, allowing administrators to expand or condense access by modifying the group directly. Any tags within the group are considered part of the article or user profile the group is assigned to.

The exclusionary interaction between tags is different if the tags are within the same tag group. A user profile that has one access tag can view articles that have been restricted by that tag's group. Likewise, if an article has two tags that are part of the same tag group, a user profile that has just one of those tags allows the users full access. However, if an article has one restriction, and the user profile has a different access tag that is within the same tag group as the article's, then a user with the user profile cannot access the article.

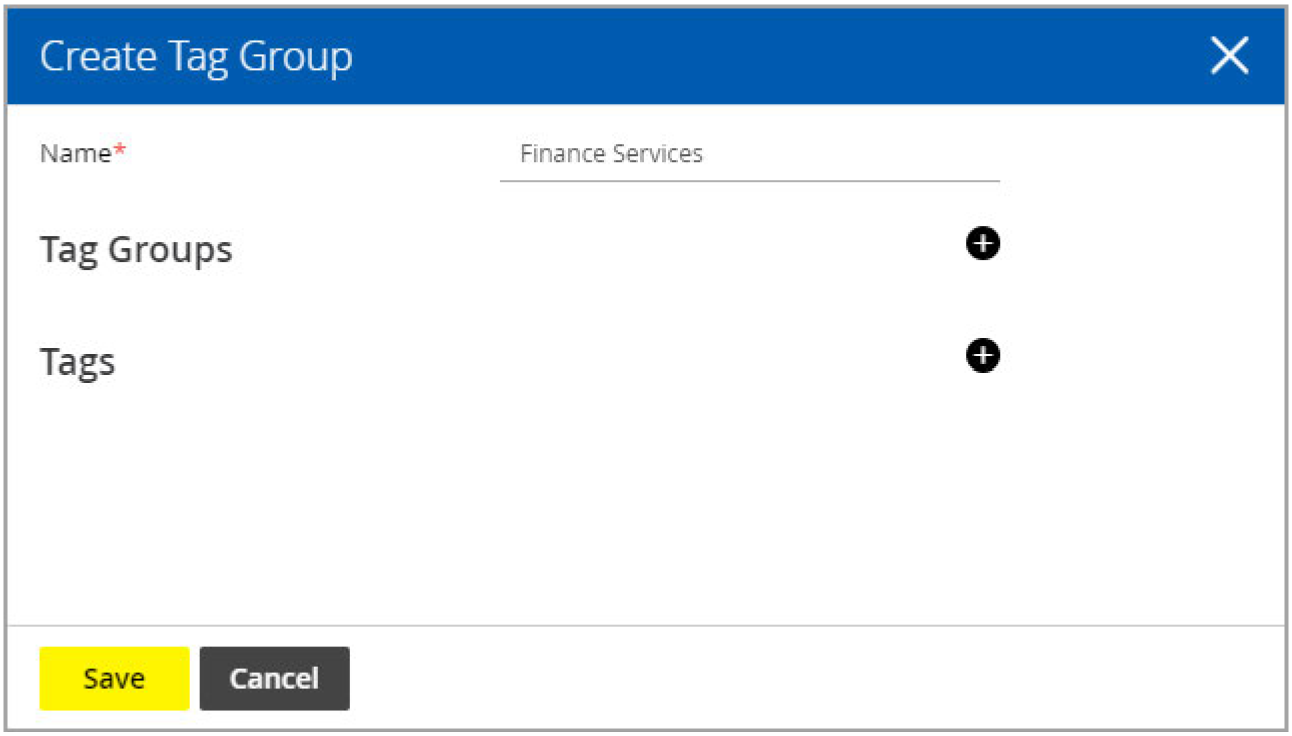
For example: an administrator has created a tag group called App Store. Within it are two tags: iOS Store and Play Store. If an article has been restricted using the iOS Store tag, a user with the user profile containing Play Store cannot access the article with the iOS Store tag. However, if the article has both iOS Store and Play Store, a user profile containing either of those tags allows the user to have full access. Similarly, if the article has instead been tagged with App Store, a user profile with either the iOS Store or Play Store tag allows its user access to the article.

Administrators can also create tag groups within a tag group. This nesting of groups can occur up to two group levels in total. Tags can then be assigned to each of the tag groups through each of the group's **Relationships** tab.

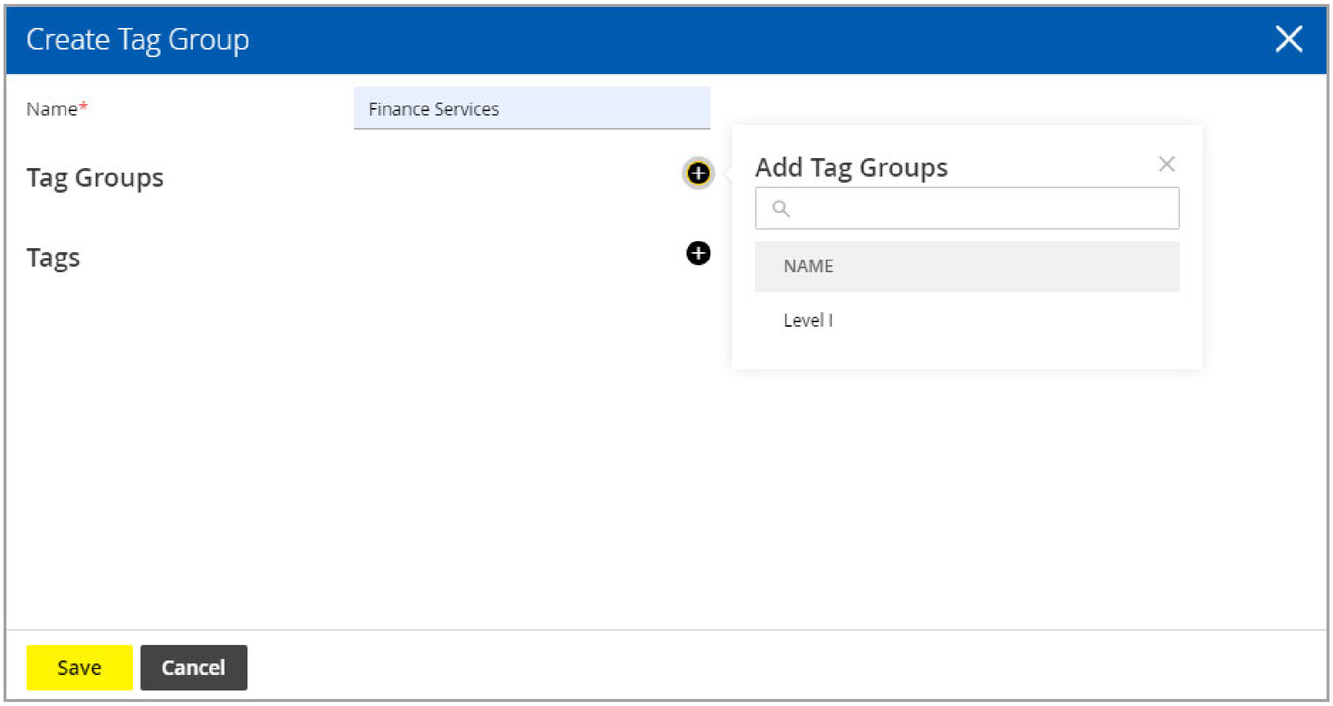
Creating Tag Groups

To create a tag group:

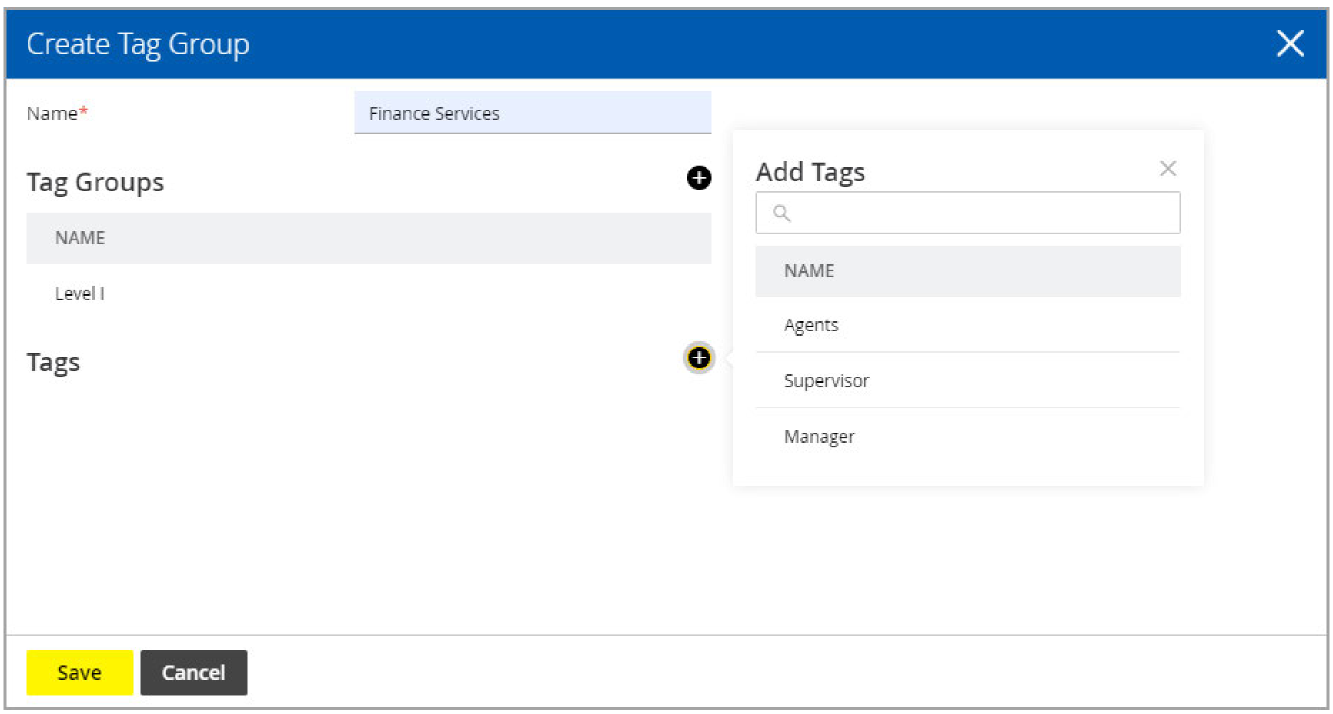
1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Tag Categories**.
4. In the List page, select a tag category.
5. In the Properties page, on the Tag Groups tab, click the **New** + button.
6. In the Create Tag Group window, provide a **Name** for the tag group.



7. In the Tag Groups section, click the **Add** button to select and add tag groups within the tag group.



8. In the Tags section, click the **Add** button to select and add tags within the tag group.



9. Click the **Save** button.

Deleting Tag Groups

Tag Groups cannot be deleted while in use.

To delete tag groups:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Tag Categories**.
4. From the Tag Group tab, identify the tag group you want to delete.
5. From the Actions column, click the **Options** ⋯ button.
6. Select **Delete** from the menu.
7. A message appears asking to confirm the deletion. Click **Yes** to delete the tag group.

User Profiles

User profiles are objects created by administrators for users. User profiles are sets of tags that determine whether or not a user has access to tagged content. This allows administrators to grant access to the assigned user group or user any content restricted by the same tags. If a user profile does not at least contain the same access tags as an article's access tags, a user with that user profile cannot access the article. A user profile is a key to an access tag's lock; the user's profile tags must match the article's access tags, or tags contained within its publish view to view a tagged article.

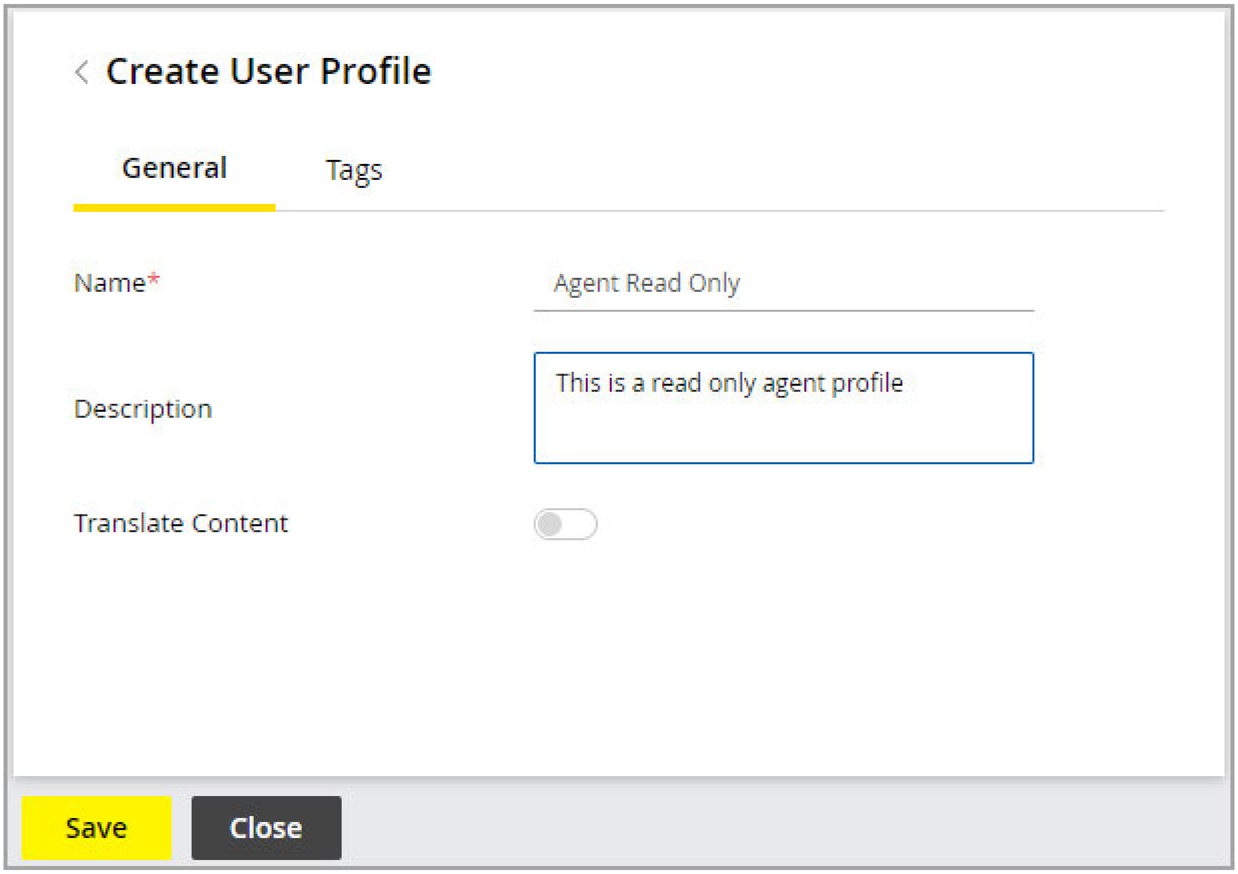
For example: An author has written an article about technical troubleshooting for their latest smartphone model and access tagged it with Senior Customer Support. Meanwhile, an administrator has created a user profile named Senior CS and assigned it the Senior Customer Support tag. Any users assigned the Senior CS user profile can view the troubleshooting article, while all users who do not have the Senior CS user profile are unable to see the article. If the article has been assigned both the Senior Customer Support and the West Coast tags, users assigned the Senior CS user profile will become unable to see the article, until the Senior CS user profile is also assigned the West Coast tag.

Creating User Profiles

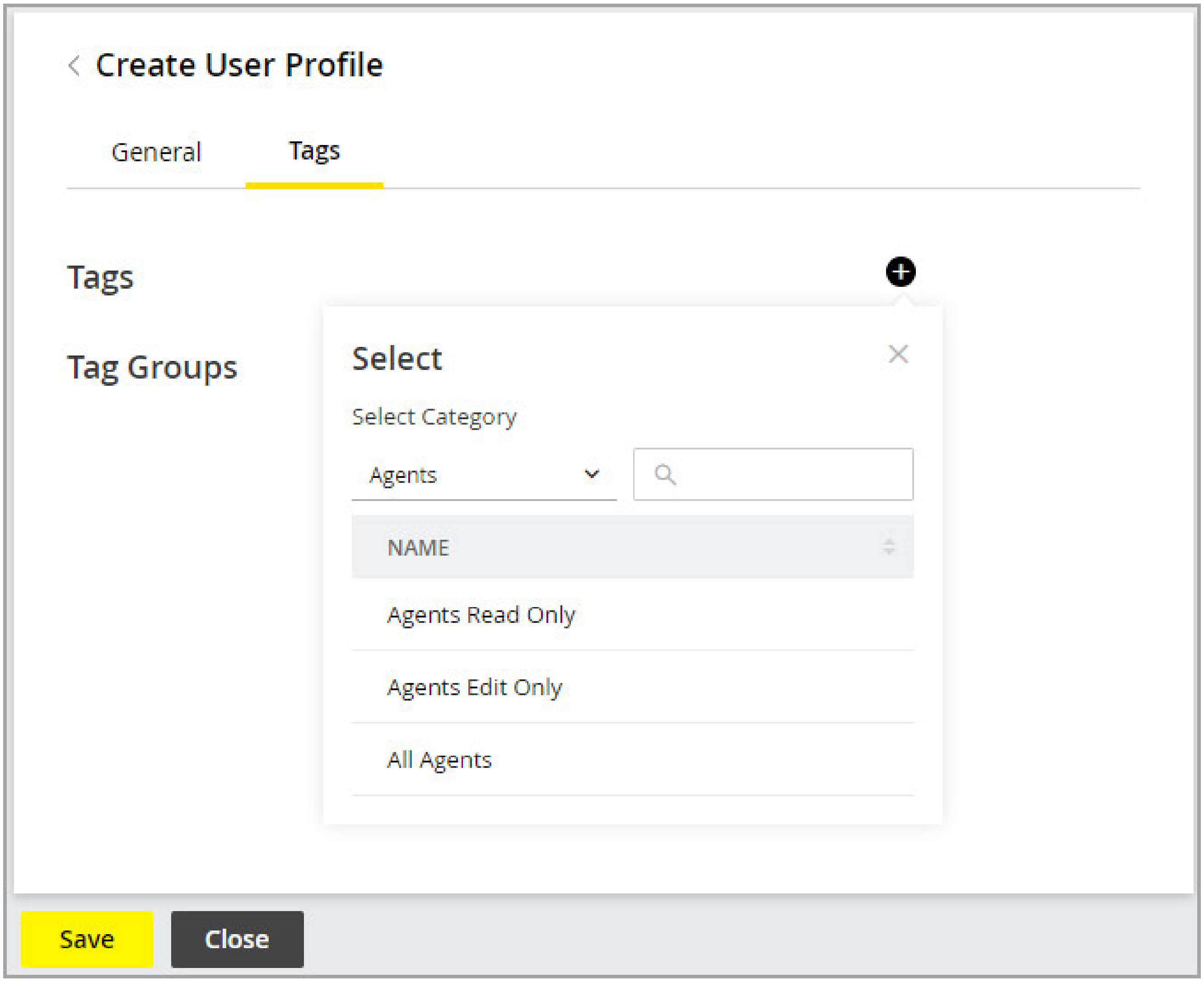
To create a user profile:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > User Profiles**.
4. In the List page toolbar, click the **New** + button.
5. On the Properties page, on the General tab, provide the following details:
   - **Name:** Provide a name for the user profile.
   - **Description:** Provide a description for the user profile.

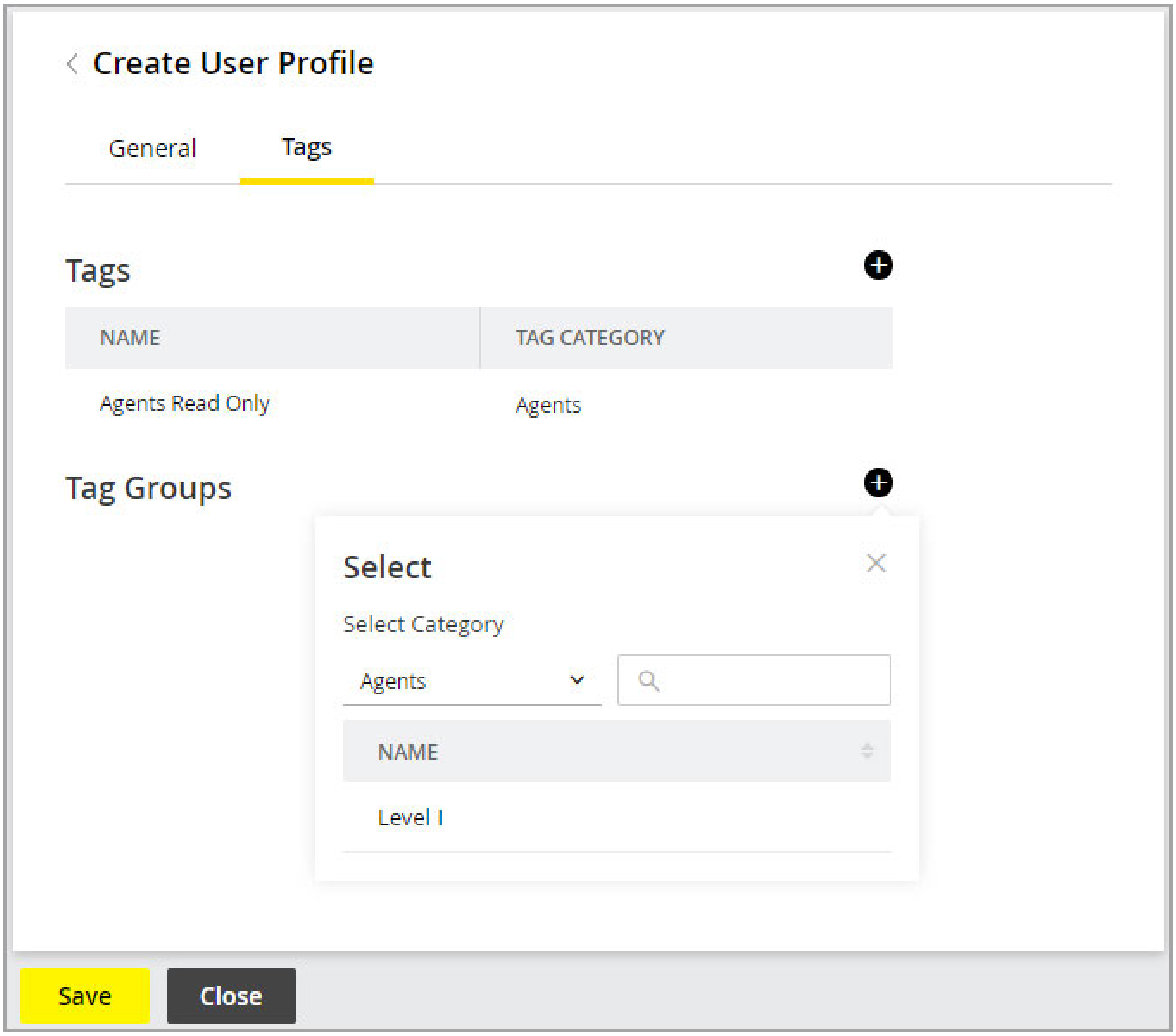
- **Translate Content:** Click the **Toggle** button if you want this user profile to be considered for translation when the content is exported for translation.



6. On the Tags tab, in the Tags section, click the **Add** button and select a category from the dropdown menu. Next, add tags to the user profile.



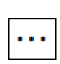
7. In the Tag Groups section, click the **Add**  button and select a category from the drop-down menu. Next, add tag groups to the user profile.



8. Click the **Save** button.

Deleting User Profiles

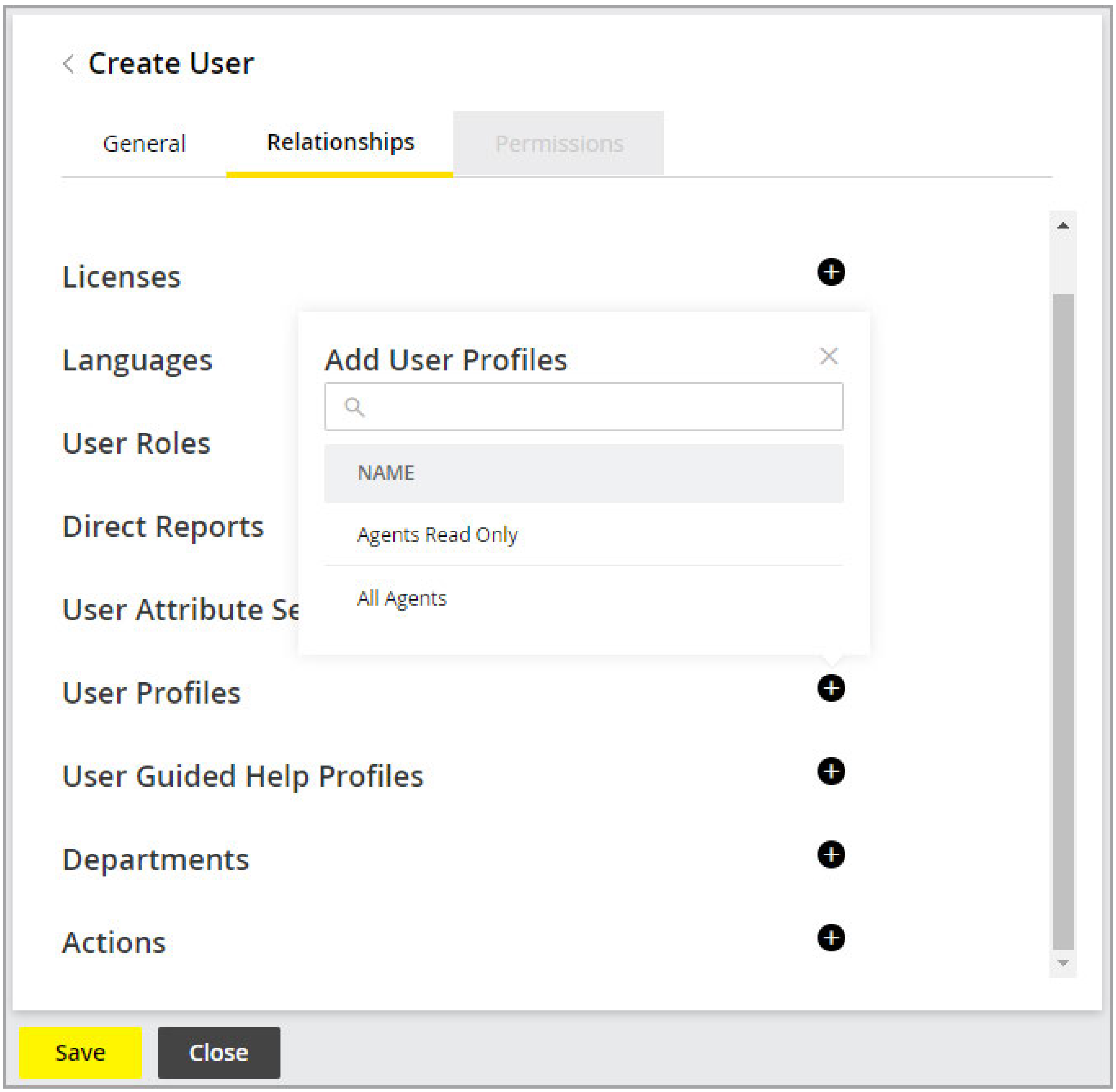
To delete a user profile:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > User Profiles**.
4. Identify the user profile you want to delete.
5. From the Actions column, click the **Options**  button.
6. Select **Delete** from the menu.
7. A message appears asking to confirm the deletion. Click **Yes** to delete the tag group.

Assigning User Profiles to Users

To assign user profiles to users:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **User > Users**.
4. In the List page, select a user.
5. In the Properties page, on the Relationships tab, navigate to the **User Profiles** section.
6. Click the **Add** button and select the desired profile for this user from the User Profiles list.



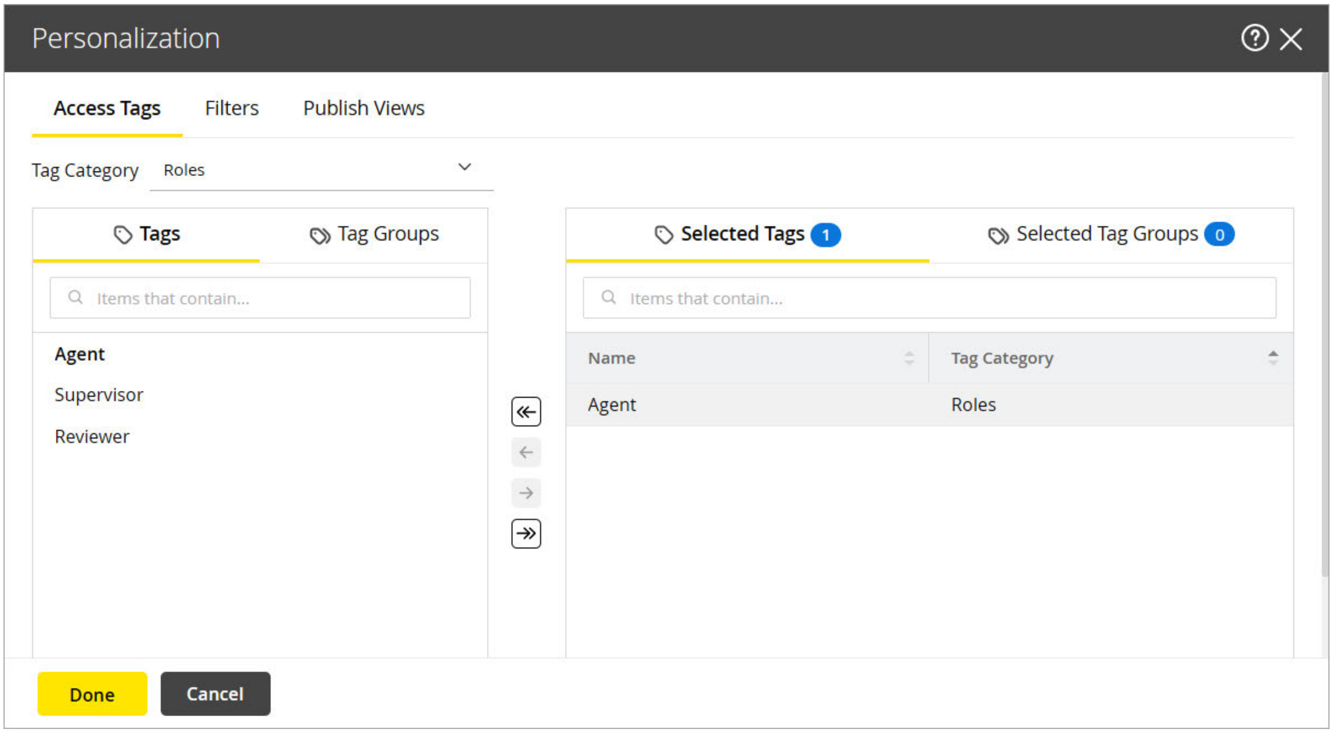
7. Click the **Save** button.

Access Tags

Access tags control user access to an article. Access tags are assigned to articles to prevent users from viewing that article, unless the user possesses the same access tags through their user profile. Access tags are assigned directly to articles and can include both tags and tag groups. A user must have all of the access tags assigned to an article in order to view it. There is an exception where, if an article contains two tags from the same tag category and a user is assigned one of those tags, the user can view the article even though the article has two assigned access tags.

To add access tags to an article:

1. In the Navigation Menu, browse to **Authoring** > **Articles.**
2. From the Folders List, select a folder.
3. From the Articles List, select the article to which you want to add access tags.
4. Click the **Edit** button to checkout the article.
5. In the Properties pane, click the **Settings** button.
6. From the dropdown list, click the **Toggle** button next to Personalization to enable it.
7. The Personalization section is now visible in the Properties pane. Click the **Edit** button.
8. In the Personalization window, select the Access Tags section.
9. From the Tag Category dropdown menu, select a tag category. Once a category is selected, the list of available tag groups and tags refreshes.
10. Click the **Expand** button next to Tags or Tag Groups.
11. Select the desired tags or tag groups.



12. Click the **Done** button.

Filter Tags

Filter tags are tags that are situated on the web self-service portal. When agents or customers search for articles in the portal, they may select tags that they would like to use to refine their search results. The search results are then narrowed down to articles that have the same filter tags as the selected filters.

On the portal, filters take form as boxes that users may select, which indicates to the system that the user is interested in seeing articles with the selected tags. These are called Tag Categories for Interest. For information on configuring Tag Categories for Interest, see the *Author's Guide to Portals*.

Adding Filter Tags to Articles

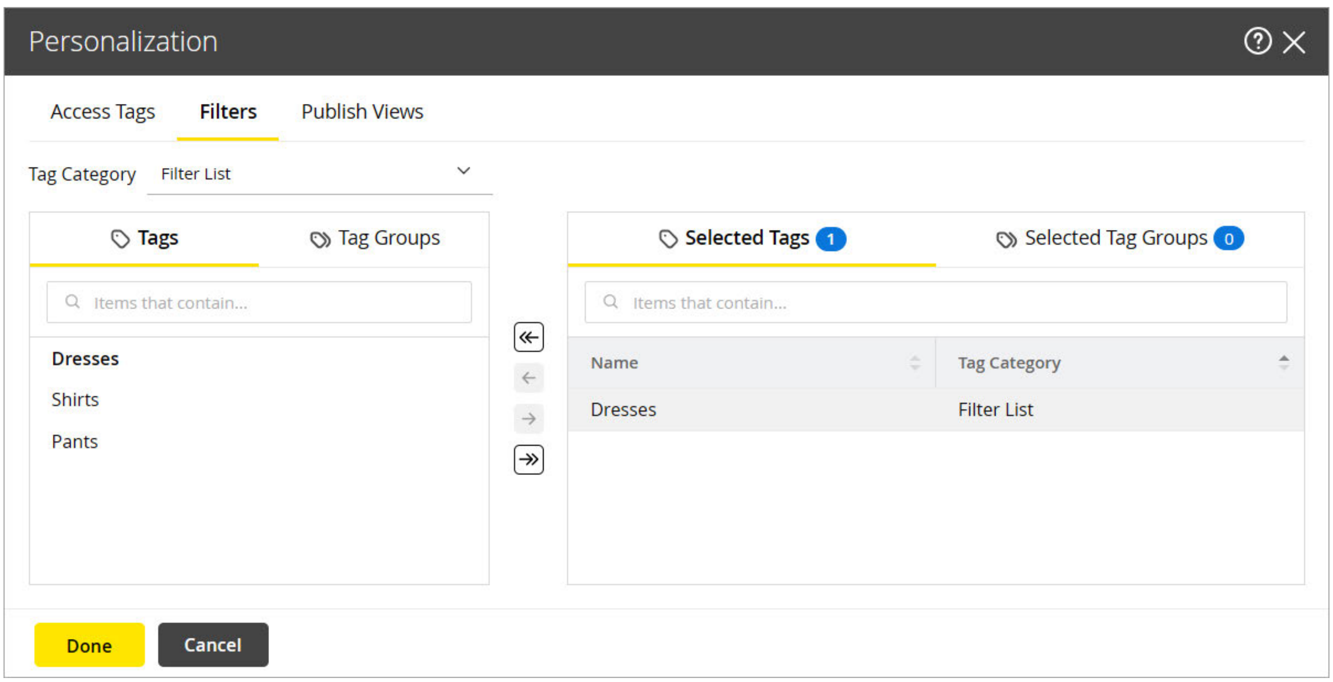
When applied to articles, filters are used as descriptors. Authors assign them to an article to mark them as related. Filters assigned to articles must have a matching Tag Category for Interest for filtering to work.

For example: An author assigns the WiFi and Tablet tags as filter tags to an article. On the portal, a user can select either WiFi or Tablet, or both the WiFi and Tablet boxes and perform a search for articles that include those tags. All articles returned in the search will possess the WiFi and Tablet tags as filter tags. It is not necessary to refine all of the filters assigned to an article; one filter is enough.

To add filter tags to an article:

1. In the Navigation Menu, browse to **Authoring > Articles.**

2. From the Folders List, select a folder.
3. From the Articles List, select the article to which you want to add filter tags.
4. Click the **Edit** button to checkout the article.
5. In the Properties pane, click the **Settings** button.
6. From the dropdown list, click the **Toggle** button next to Personalization to enable it.
7. The Personalization section is now visible in the Properties pane. Click the **Edit** button.
8. In the Personalization window, select the **Filters** tab.
9. From the Tag Category dropdown menu, select a tag category. Once a category is selected, the list of available tag groups and tags refreshes.
10. Click the **Expand** button next to Tags or Tag Groups.
11. Select the desired tags or tag groups.



12. Click the **Done** button.

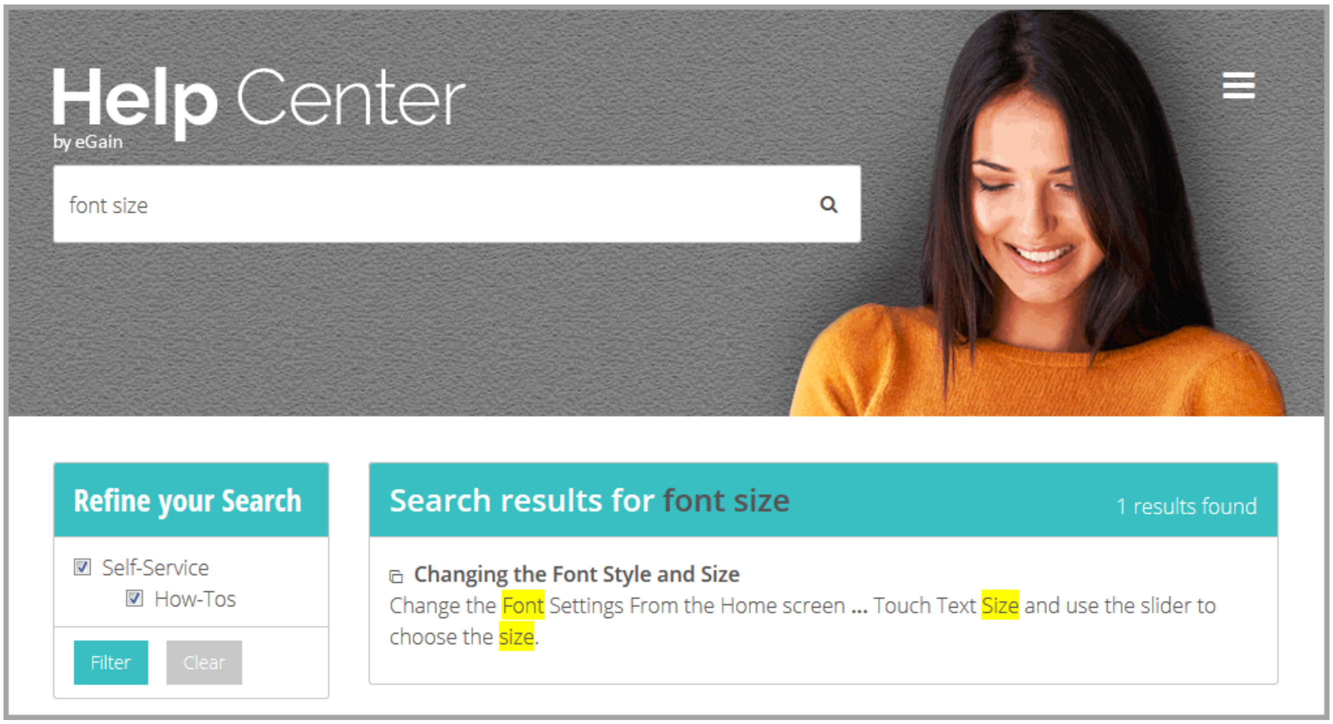
Using Filters

Self-service portal users can refine their search results using filters. Applying a filter to the search results returns all articles that use the same tag as a filter. Objects such as tag categories, tag groups, and tags can all be used as filters. Assigned filters do not have to be related to the article's access tags or publish views.

Note: Filters are visible to users on the portal and should be named appropriately.

To use filters in portal searches:

1. From the Personalization tab, assign Filters to the articles.
2. From the Portal settings, assign **Tag Categories for Interest**. For more information, see the *Author's Guide to Portals*.
3. Access the knowledge portal and run a search.
4. In the Refine your Search section, click all the checkboxes next to the filters you wish to apply to your search.
5. Click the **Filter** button. The results refresh to display the articles that best match your search terms and have the filter tags assigned to them.



Publish Views

In some situations, an article may contain information that pertains to different sets of audiences. Instead of requiring authors to create completely separate articles for each audience, individual sections can be tagged to only show the information that is relevant. Agents and website visitors with the correct user profiles can then read the article with the sections that apply to them. For more information, see Content Tagging.

> Before tagging article content or assigning publish views for an article, it is recommended to consider if single-sourcing is necessary for your knowledge content. For more details, see Single Sourcing for Authors.

Publish views are sets of tags used by Knowledge managers and authors to generate multiple versions of the same article for display on the self-service portal. Publish views are used in conjunction with single-sourcing to tailor the content of an article to a specific audience by restricting access to an article's version to users that possess the same tags. The process is as such:

- An author tags different sections of an article's content.

- The author assigns one or more publish views.
- The article is published.
- The system generates a version of the article for each assigned publish view. Content that has been assigned tags is displayed with each matching publish view.

A default article view without conditional text can be created by assigning an untagged publish view to the article. If a user has access to more than one article version, they can switch between each while viewing the portal by selecting the tabs in the article content.

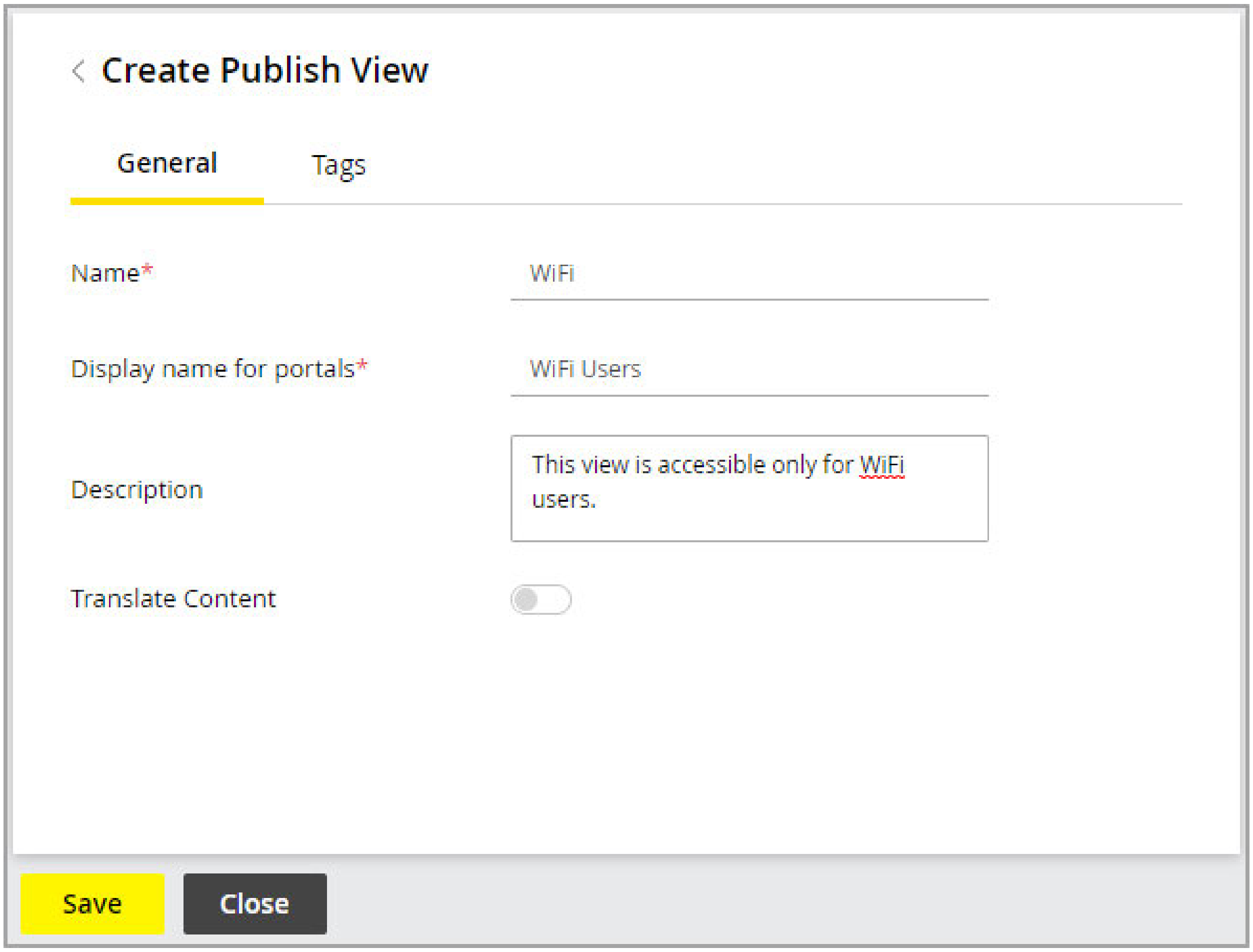
> Publish views restrict article access automatically. Users that do not possess tags matching a publish view assigned to an article cannot view the article.

For example: An author has written an article with general information about the new model of tablets made by their company. There is a section of the article that only applies to the version of the tablet that can only connect to the internet through WiFi. The author has tagged that section with the WiFi tag and assigned the publish view with the WiFi tag to the article along with a default publish view. When the article is published, two versions of the article are created: one version has the section for WiFi tablets, while the other does not. Users who have the user profile with the necessary access tags can view the version of the article that applies to them.

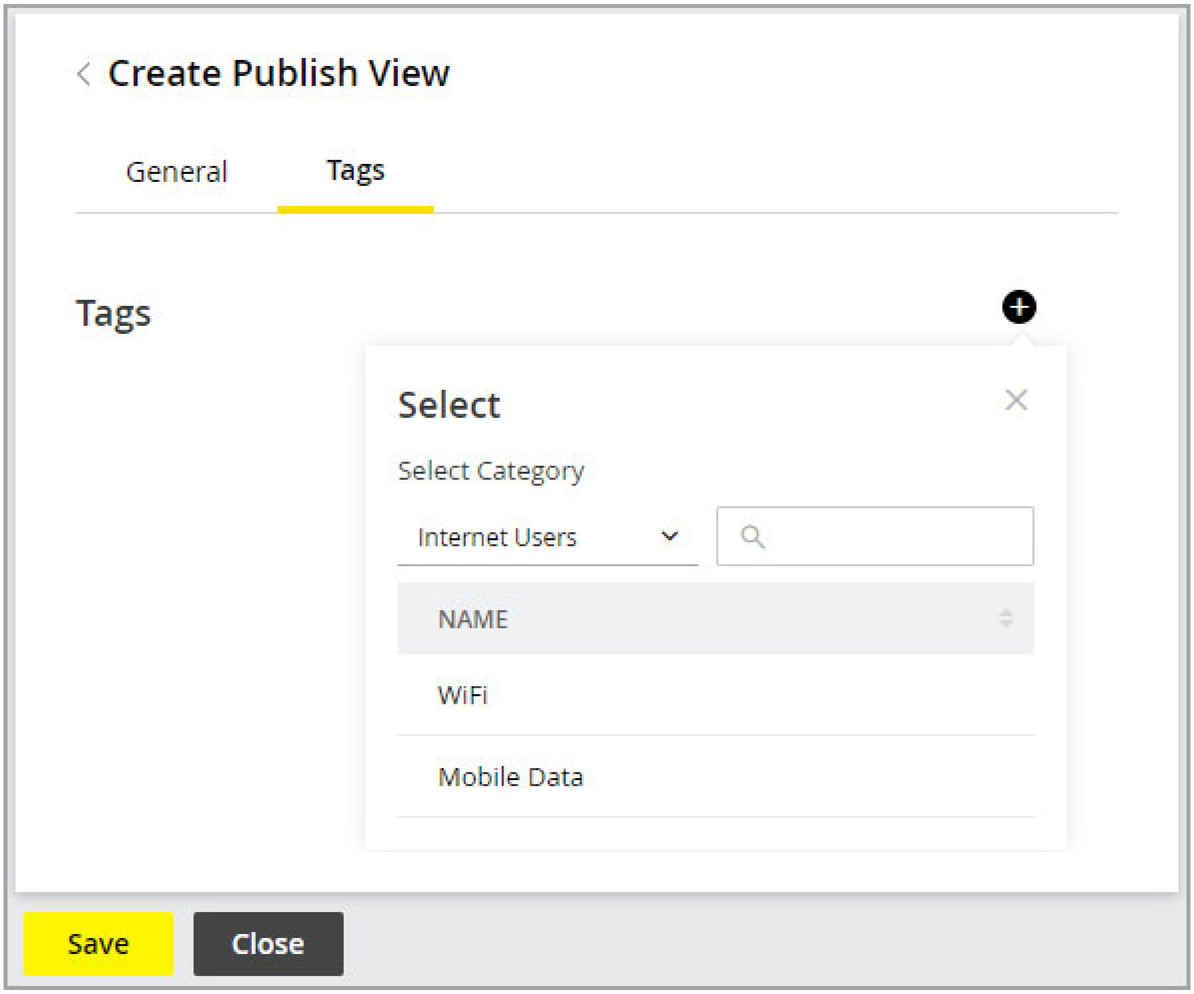
Creating Publish Views

To create publish views:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Publish Views**.
4. In the List page toolbar, click the **New** + button.
5. On the Properties page, on the General tab, provide the following:
    - **Name:** Provide a name for the publish view.
    - **Display name for portals:** When publish views are assigned to an article visible on a knowledge portal, the display names are shown in the portal to users who can see more than one version of the article. This gives authors the option to use the Display name for portals when assigning publish views to articles.
    - **Description:** Provide a description for the publish view.
    - **Translate Content:** Click the **Toggle** button if you want this publish view to be considered for translation when the content is exported for translation.



6. On the Tags tab, in the Tags section, click the **Add** button and select a category from the drop down menu. Next, add tags for the publish view. More than one tag category can be used when creating a publish view.



Tag groups cannot be used to assign tags to publish views. Select a new tag category if necessary and repeat this process for each tag category until all the desired tags have been assigned.

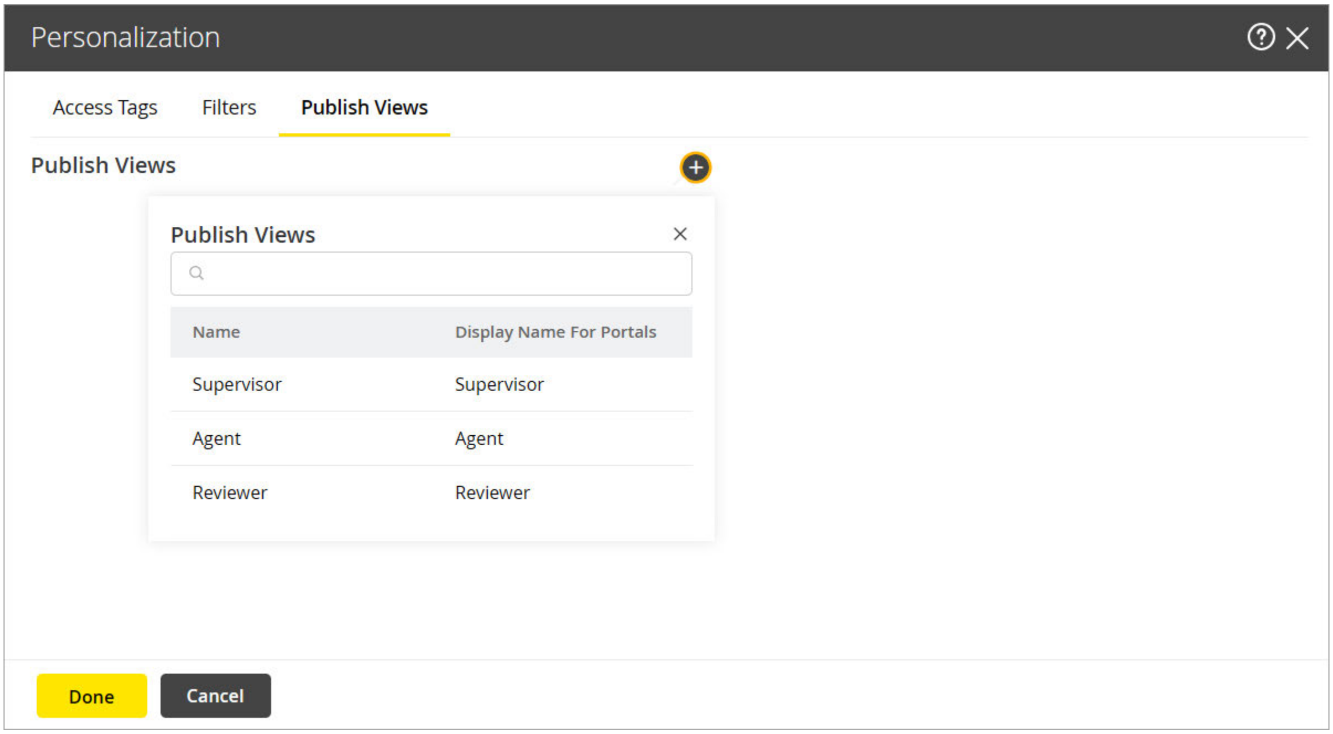
7. Click the **Save** button.

Applying Publish Views to Articles

To add publish views to an article:

1. In the Navigation Menu, browse to **Authoring > Articles.**
2. From the Folders List, select a folder.
3. From the Articles List, select the article to which you want to add publish views.
4. Click the **Edit** button to checkout the article.
5. In the Properties pane, click the **Settings** button.
6. From the dropdown list, click the **Toggle** button next to Personalization to enable it.
7. The Personalization section is now visible in the Properties pane. Click the **Edit** button.
8. In the Personalization window, select the **Publish Views** tab.

9. From the Publish Views section, click the **Add** ⊕ button.
10. Select the desired publish views.



11. You can change the display name of any of the selected published views by selecting the **Display Name For Portals** field and making your changes. This identifies the version of the article on the portal to users who may have access to multiple versions of an article.
12. Click the **Done** button.

Deleting Publish Views

To delete publish views:

1. Log in to the Administration Console.
2. From the Partition and Departments dropdown menu, select a department.
3. From the Navigation menu, browse to **Personalization > Publish Views**.
4. Identify the publish view you want to delete.
5. From the Actions column, click the **Options** ··· button.
6. Select **Delete** from the menu.
7. A message appears asking to confirm the deletion. Click **Yes** to delete the tag group.

Content Tagging

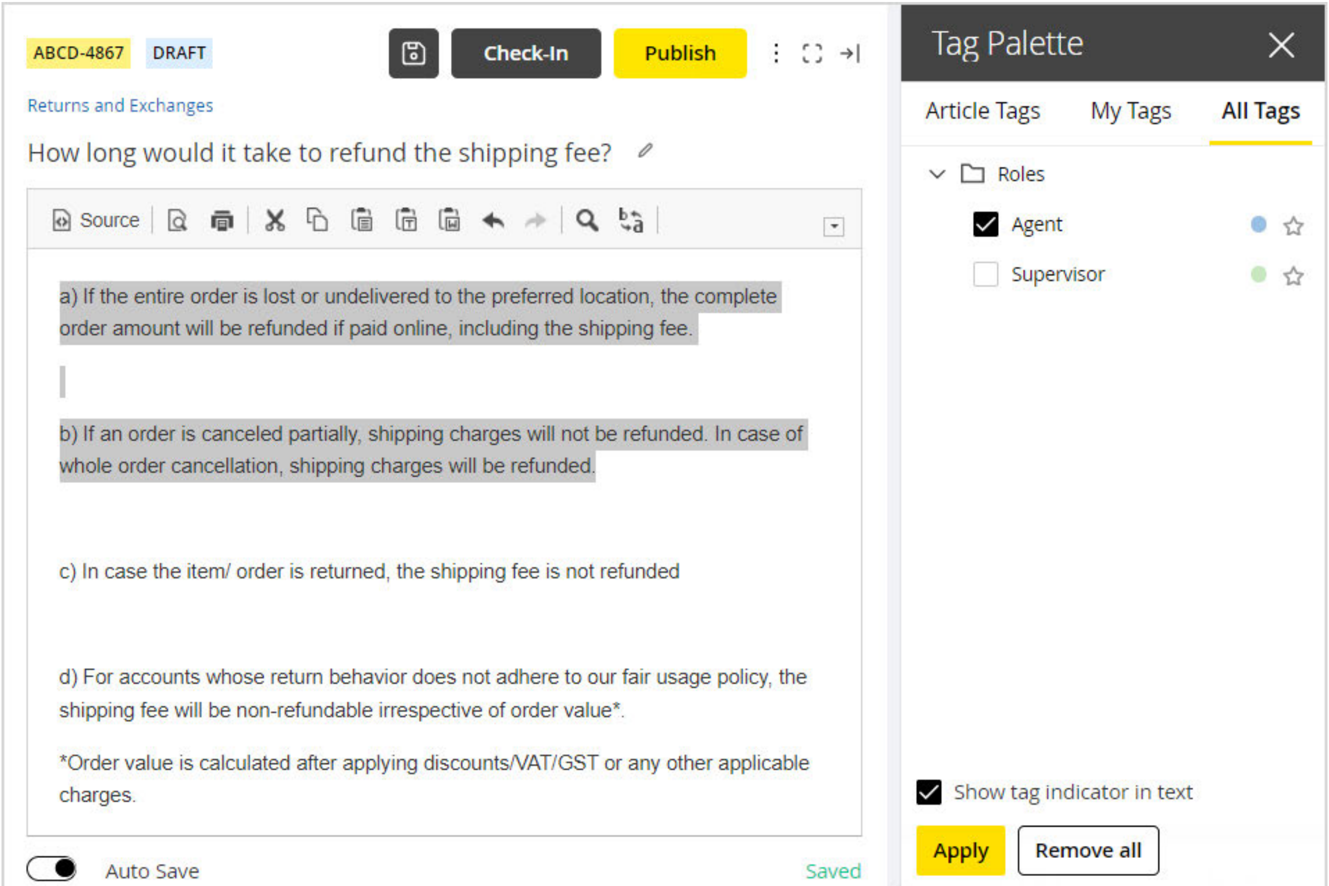
In some situations, an article may contain information that pertains to different sets of audiences. Instead of requiring authors to create completely separate articles for each audience, the individual sections can be tagged to only show the relevant information. Agents and website visitors with the correct user profiles can then read the article with the sections that apply to them. Users who can view more than one of an article's Publish Views on the portal can switch between them by clicking tabs with the publish view's name. Keep in mind, however, that content tagging should be reserved for situations where the article's versions have more than 60% overlap in content. Before tagging article content or assigning publish views for an article, it is recommended to consider if single sourcing is required.

While creating an article, the author can use the Tag Palette to apply the conditional tags to the different sections of the article. Once the content has been tagged, the author assigns a publish view to the article to ensure that a version of the article is created to utilize the tags. For more information on Publish Views, see Publish Views.

> Personalized articles are incompatible with macros. Articles that have been personalized with conditional text cannot be used as a macro. Articles that are macros cannot be personalized.

To tag the content of an article:

1. In the Navigation Menu, browse to **Authoring > Articles.**
2. From the Folders List, select a folder.
3. From the Articles List, select the article for which you want to tag content.
4. Click the **Edit** button to check out the article.
5. From the Content pane, click the **Context Menu** ⋮ button.
6. From the Context Menu dropdown, select **Open Tag Palette**.
7. The Tag Palette window appears. The tags available in the Tag Palette are created by the administrator. There are three tabs available:
    - **Article Tags:** Any tags that have been applied to the article content.
    - **My Tags:** Any tags that you have saved for later use. You can add a specific tag to the My Tags list of the palette window by clicking the star next to the tag in either the Article Tags list or the All Tags list.
    - **All Tags:** All available tags.
8. From the Content area, select the portion of the article to which you wish to apply tags.
9. In the Tag Palette window, select the checkboxes for all the tags that apply to the selected content.
10. Click the **Apply** button.



11. If you wish to remove tags from the article content, you must highlight the section of the text for which you want to remove the tags and click the **Remove all** button.
12. If the **Show Tag Indicator in Text** check box has been selected, the tagged content is highlighted. If the content only has one tag applied to it and it has a color assigned, the text is highlighted in that color. If multiple tags or tags without colors assigned are applied to the content, the content is highlighted with a grey color. The color-highlighted text does not appear on the portal.
13. Once you have tagged all the necessary content, assign the publish views that apply.

    A publish view is required for articles that have tagged content.

14. Click the **Save** button.