

# Glossary

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# A

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## [Access Tags](#)

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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. Users must have at least one tag from a tag category represented in the access tags in their active user profile to view an article. See also, [User Profiles](#).

## [Advanced Search](#)

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This is an advanced search feature that allows you to specify various attributes of the object to locate it in the Knowledge Console. For example, you can search for an article by looking for the description, created date, macros used, etc.

## [Article Sharing](#)

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This feature allows users to share articles that they view on the portal. When this setting is enabled for a portal, the Share button appears on the article page and clicking this button allows the user to send an email containing the article content.

## [Article Subscription](#)

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The article subscription feature allows agents and authenticated customers to be notified when the content of an article has been updated. This is helpful in keeping users updated about the latest information that is available for an article.

## [Article Templates](#)

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Article templates are standard article layouts containing the formatting and styles to be used by authors to create new articles quickly. In other words, they act as a standard starting point for new articles to help speed up the authoring process and maintain consistency across articles.

## [Article Types](#)

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Every article that is created in the console must have an article type assigned with each type having a different purpose. Article types determine the workflow that is used for processing an article. The behavior of the article is also determined by the article type. The article types that come with the application are: Data Link, General, Guidance, Guided Help Session, Rich Message, Suggestion, Topic Home and Virtual Assistant Action article type.

## [Article Versions](#)

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A new version of an article is created and stored every time a user checks out an article. These versions of the article can be viewed in the Knowledge Console.

## Article Workflows

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These workflows define the process for creating and reviewing updates to the article content.

## B

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### Bookmarks

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A bookmark is a valuable tool that helps agents to go directly to specific articles. You can bookmark articles that are most frequently used by agents. These bookmarks become available to agents in a special list, and they can use them while responding to customers.

### Bulk Publish

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This feature allows you to publish multiple articles in a workflow with one operation. These articles can be in the Staging stage or in any of the stages between the Staging stage and the Publish stage. See also, [Staged Authoring](#).

## C

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### Cases

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In a case base, a case is a set of question-and-answer pairs with a solution. A solution could be either an article or a control action. A case where the solution is an article is a content case and a case where the solution is a control action is a control case.

### Case Bases

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When using guided help, the user is asked questions to accurately determine the nature of their query. These queries are then matched against a store of known scenarios and when a matching scenario is found, the user is presented with a relevant article. A case base is a map of these scenarios and the questions which must be asked to distinguish one case from another.

### Chat Quick Responses

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This is a pre-defined folder wherein you can create responses for agents to use during their chat conversation with a customer. The following sub-folders are contained in the chat quick responses folder: Quick Links and Quick Responses.

### Classifications

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Articles can be classified based on some common criteria for efficient organization. When an article is used in a response, the classifications that are associated with that article are used to categorize the activity.

## Clusters

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A case base is organized into sections known as clusters. Each cluster is essentially a mini case base, containing its own set of cases, questions, articles, and control actions that are relevant to those cases as well as other clusters. Clusters are organized into tree structures, with the children of a cluster inheriting the objects that are available in the parent cluster. For example, a question or an article defined in the parent cluster or one of its ancestors can be used in the child cluster.

## Compliance Policies/ Read & Sign Policy

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When a compliance policy is applied to articles, the users must confirm reading the article. This is helpful in those organizations where conforming to processes or policies is mandatory.

## Contributors

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Contributors are authors that review articles or suggestions in a review stage of the workflow. They can move the articles forward or send the article back to previous stages in the workflow.

## Control Actions

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These are used to link the current cluster to the next cluster. If a sequence of questions and answers leads to another cluster, a control action is used as a solution to activate that cluster. Control actions can also be used to answer questions automatically.

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### Data Link Articles

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Data Link articles facilitate data-enabled Guided Help by allowing data adapters to be used to answer questions and pass information to third party systems.

## E

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### Email Escalation

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When customers fail to find the information they are seeking, the escalation feature allows them to raise their request through the email channel. When this feature is enabled, an Email link appears in the Contact Us section of the portal.

### Email Quick Responses

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This is a pre-defined folder wherein you can create responses for agents to use during their communication with the customer through the email channel. The following sub-folders are contained in the email quick responses folder: Headers, Greetings, Footers, Signatures, Auto-Acknowledgments.

## F

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### [Filters](#)

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These are tags situated on the web self-service portal. When agents or customers search for articles on the portal, they can 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. See also, [Tag Categories for Interest](#).

## G

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### [Global Search](#)

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This is a basic search that you can perform in the Knowledge Console by providing value or attribute of the selected object.

### [Guidance Articles](#)

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This is an article type that is used as Additional Information in guided help questions. While articles with other article types are displayed as a link when they are used as Additional Information for a question, when an article with this article type is used as Additional Information for a question, the content of that article is automatically displayed as part of the question in a portal. This provides the distinct and convenient advantage of content being displayed automatically in this situation.

### [Guided Help Sessions Articles](#)

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These articles pre-answer questions for specific use cases, so that users may start a Guided Help session at the point that is relevant for the issue they are trying to resolve.

### [Global Bookmarks](#)

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These bookmarks are available to all the users who have view permissions on the folder in which the bookmarked article is located.

## K

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### [Knowledge Building Blocks](#)

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This is a pre-defined folder that contains Topic Home Articles, Virtual Assistant Articles and Workflow Notifications. The Topic Home articles folder contains articles that act as descriptions for the Topics. The Workflow Notifications folder contains articles that can be used as notifications in the workflow. The Virtual Assistant articles have pre-defined

templates that the author uses as Virtual Assistant action articles. The articles within the Knowledge Building Blocks folder cannot have macros defined, neither can these articles be referenced as related articles or used in article links.

## [Knowledge Promotion](#)

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This is a process that allows you to migrate portal data that has been designed, authored, and tested on [REDACTED] installation so that it can be accessed by agents and customers on another dedicated [REDACTED] installation. This is helpful in today's contact centers as there is a need to maintain 24x7 operations with minimal interruption.

## [Knowledge Workflows](#)

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Workflows are a means of providing feedback and review before the content is published. They are essential for content that needs more than one level of review. There are two types of knowledge workflows: [Article workflows](#) and [Suggestion workflows](#).

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### [Live Release](#)

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The live release is the version of the case base that is presented to end users through the portal. When changes have been fully tested and approved, a live release can easily be created.

## M

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### [Macro](#)

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Macros are shortcuts that are assigned to an article. Using macros allows authors to single-source frequently used content by inserting an article macro within another article, which allows agents to quickly add articles to their responses. Users can also use business objects and data adapter macros in the article content.

### [Master Portal](#)

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This is an automatically created portal that allows access to all published articles in the department. Every department has its own master portal.

### [Metadata](#)

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Metadata is added to articles to help with search tuning of articles. There are four types of metadata that can be added to articles: description, summary, keywords, and additional information.

## [My Work](#)

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Articles and suggestions in the review stages of a workflow where the user is a 'contributor' or a 'user that can skip a stage' appear in the My Work list for that user. The user also needs the required permissions on the folder where the article or suggestion is located.

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### [Personal Bookmarks](#)

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These bookmarks can be created and viewed only from the Advisor Desktop. These are for the personal reference of agents, and they can create them according to their needs.

### [Personalization](#)

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Personalization is a feature designed to tailor content on the knowledge portal to various subsets of the audience. It can be used to give priority users or partners access to internal content, or to 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.

### [Publish Views](#)

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Publish views are sets of tags used to generate multiple editions 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 granting access to an article's version to users that possess the same tags.

## Q

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### [Queue Bookmarks](#)

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These bookmarks are associated with a queue. When a user is working on an activity from a particular queue, they see the bookmarks associated with that queue.

### [Quick Access Lists](#)

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These lists enable quick access to certain types of articles. The following are the out-of-the-box lists that are created when the application is installed: Articles About to Expire, New Articles, Popular Articles and Updated Articles.

## R

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### References

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This is a quick way to find out where an object is being used as well as the other objects that use it. Users can check references for articles, portals, case bases, as well as case base objects.

### Related Articles

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When an article is opened from the self-service portal, related articles are displayed as a list of articles which are recognized as being related to the current article. Users can add other articles in the system as related articles, or you can also add links to external resources (pages or media) in the form of web articles as related articles. The other articles within the same topic as the article can also be considered as related articles.

### Rich Message

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This is an article type that is used for sending chat messages with rich content (for example, date pickers or links) to mobile devices.

### Root Cluster

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When a new case base is created, a root cluster is created in the case base by default. A case base can have only one root cluster. The name and properties of the root cluster can be changed, but it cannot be deleted.

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### Staged Authoring

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This stage in a workflow allows an article that has not yet been published to be available in the portal. Staging is an out-of-the-box workflow stage that can be added to Article workflows. Staged Authoring allows users other than authors to view articles that are actively in the process of being updated. This allows users to view and provide feedback for articles that have not been published yet. Staged Authoring feature enhances the spectrum of users who can perform acceptance testing for an article.

### Staging Stage

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Adding the Staging stage in the workflow allows the updates to the article being processed by that workflow to be visible to users with the appropriate user roles. Articles in review stages before the Staging stage are visible to users with the Author view and articles in the Staging stage or any subsequent review stages are only visible to users with the Staging view.



## Startup Cluster

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These clusters determine the first question or questions that are presented to the user when a case base is activated. Only one cluster can be designated the startup cluster. By default, the root cluster is the startup cluster, but user-defined clusters can be designated as the startup cluster.

## Submitters

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Any user who works on an article draft and sends the article to the knowledge workflow is a submitter. The user who starts the process of sending the article through the knowledge workflow, automatically becomes the submitter of the article.

## Suggestion Workflows

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These workflows apply to suggestions for new articles and feedback on existing articles.

## T

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## Tags

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Tags are at the root of every personalization capability. They are essentially labels, and when applied to an object restrict, or permit access to content.

## Tag Categories

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These 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.

## Tag Categories for Interest

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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. These tag categories of interest are configured for a portal through the portal settings.

## Tag Groups

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Tag groups are a subset of the tags for a tag category. Selecting a tag group as an access or filter tag has the same impact as selecting all the tags in the tag group. 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.

## Topic Home Articles

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These are used exclusively for articles that act as the home page for a topic on the portal. Topic Home articles provide a space on the knowledge portal to share more information about the topic and the type of articles the topic contains. When associated with a topic, through a new topic attribute, the article content is displayed as part of a topic in a portal. A Topic Home folder is already created in the Knowledge Building Blocks folder in the Folder list of the Knowledge Console.

## Translations

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Once information has been created within the Knowledge Console and it has been tested and proved to be working effectively, it can be translated into one or more target languages. The content can either be translated in the Knowledge Console itself or the textual information can be exported from the Knowledge Console and presented to translators. Language content should be translated in the Knowledge Console when a new article must be made available in several languages in a short duration whereas if large content needs to be translated then the translated content can be imported back in the Knowledge Console after it has been translated.

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### User Profiles

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These are sets of tags that determine whether 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. 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. See also, [Access Tags](#) and [Publish Views](#).

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### Virtual Assistant Action Articles

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These articles are used exclusively for actions performed by the virtual assistant. There are two built-in article templates for this article type: Escalation and Page Push. Escalation allows the virtual assistant to escalate a customer to an available agent. Page Push enables the virtual assistant to push a URL and navigate the customer to a different web page within the virtual assistant's domain. Virtual Assistant Articles can also be selected as Additional Information for questions in a case base and the particular action is carried out when the question is displayed to a user.