

# Populating and Maintaining your eService Center Knowledge Base

## Table of Contents

Populating and Maintaining the eService Center Knowledge Base .....	2
Key Terms .....	2
Setting up the Knowledge Base .....	3
Consider the Amount of Information to be Presented .....	3
Identify the Audience and Scope of Information .....	4
Define Products and Categories .....	4
Define Additional Custom Fields .....	5
Develop Writing and Style Guidelines .....	5
Designate Responsibilities for Managing the Knowledge Base .....	6
Define a Process for Proposing New Answers .....	7
Define an Approval Review Process for New Answers .....	7
Determine Responsibility for Publishing New Answers .....	8
Notify Staff of New Answers .....	8
Evaluate Customer Feedback .....	9
Establish a Process for Reviewing Existing Answers .....	9
Using HTML with Published Answers .....	10
HTML WYSIWYG Editor (version 5.5.2 and higher) .....	10
<AS-HTML> Tag .....	11
PC_ESCAPE_TAGS Configuration Setting .....	11
HTML References .....	12
Commonly Used HTML Tags for Answers .....	12
Font Tag Attributes .....	13
Adding Graphics to an Answer .....	14
Adding Hyperlinks to an Answer .....	14
Using Variables with your Knowledgebase .....	15

# Populating and Maintaining the eService Center Knowledge Base

One of the most powerful features of RightNow eService Center is the ease with which you can add answers to the knowledge base while providing support to your end-users. As your customers' issues are solved by your customer service staff, you can quickly publish answers to your end-user pages. As customer issues are resolved, your knowledge base can grow over time, ensuring that the information available to customers is the same information they are most interested in.

The effectiveness of your eService Center application is largely determined by the usefulness of the answers in your knowledge base and the ease with which customers can resolve their own issues. Creating a robust knowledge base that contains current and complete information requires that you organize and maintain your public answers.

Defining how your knowledge base will be set up is a crucial first step before you initially populate your knowledge base. If your knowledge base is not well organized and actively managed, the answers can easily become outdated and the information can become disjointed. As a result, finding answers can become more difficult for your site visitors. In addition to initial planning, you need to develop specific procedures for maintaining the knowledge base over the long term so that you can keep the information organized and current to maximize the effectiveness of your eSC knowledge base.

This paper describes the process of designing and maintaining an effective knowledge base and contains specific procedures for adding answers to the knowledge base, making answers available for public viewing, and incorporating HTML into your answers.

## Key Terms

You should become familiar with the terminology used here to assist you in designing and managing your eSC knowledge base.

- **Answer**—The question/answer pair accessed and edited through the Answer Console and viewable from the Answers tab on the end-user interface.
- **Incident**—Any request or question submitted by an end-user through e-mail or the Ask a Question page. Incidents are accessed through the Incident Console.
- **Managing the knowledge base**—The process of updating and growing the knowledge base by establishing procedures for proposing, publishing, and reviewing answers.
- **Proposing incidents (or answers) to the knowledge base**—The process of suggesting new answers to your current knowledge base, often after an incident has been resolved by a customer service representative. You can create new answers at the Answer Console or you can click the Propose button at the Incident Console to create a copy of the incident for editing and publishing.
- **Publishing answers**—The process of making answers available to your site visitors. You can quickly make an answer available on the end-user pages by setting the answer status, access level, product, category, and language appropriately for the end-user interface.

## Setting up the Knowledge Base

Before you initially populate your knowledge base with question/answer pairs, you must plan for the growth of the knowledge base by defining and organizing the information you want to present. By organizing information into distinct and logical products and categories, the information is more accessible to customers, and you will avoid having to reorganize your knowledge base as it becomes larger. Once your products, categories, and custom fields are in place, you can then develop the processes for proposing, publishing, and reviewing answers.

To design and build an effective knowledge base, and ultimately to manage it effectively, start by addressing the following areas:

- Consider the amount of information to be presented
- Identify your audience and the scope of information to be included
- Define products and categories
- Define additional custom fields as necessary
- Develop writing and style guidelines
- Designate responsibilities for managing your knowledge base
- Define a process for proposing new answers
- Define an approval review process for new answers
- Determine the display position of new answers on the answers lists
- Notify staff of new answers
- Evaluate customer feedback
- Determine a process for reviewing existing answers

### Consider the Amount of Information to be Presented

The first step in designing your knowledge base is determining how much information you want to publish on your site. Estimate how many answers you expect to have in your knowledge base. Will you have less than 50, more than 200, or more than 500? Gauging the size of your knowledge base gives you an idea of the extent of the work ahead and also helps you allocate the budget and resources you will need.

The more answers you expect to publish, the more time it will take to maintain the knowledge base and the more initial planning you need to do. We recommend that you build your knowledge base in stages, starting with a small set of question/answer pairs, fewer than 50 answers for example. Starting with a small knowledge base allows you to learn the process of managing it without the maintenance issues involved with a large knowledge base and allows you to easily reorganize if needed.

## Identify the Audience and Scope of Information

The next step is to identify your audience and define the scope of the information you will publish. Consider what your customers need and what they expect. Start by answering one basic question: Who will be searching your site -- current product owners, potential product owners, investors? Identifying who will be searching your knowledge base determines in large part what you will publish.

Once you identify your audience, answer the next question: What information will site visitors be searching for? Think about the range of material your customers might expect:

- Will they be looking for information on special events and offerings as well as product support?
- Will they want to know how and where to buy your products?
- Will they need information about another company's products in order to use your products?

Think about the level of detail customers will expect and need:

- Will customers want maintenance and troubleshooting information?
- Will they need technical procedures?
- Will they be interested in marketing information?

## Define Products and Categories

The Products and Categories tables in eService Center allow you to define your organization's products, sub-products, categories, and sub-categories to help your customers find the right information more quickly. The product, sub-product, category, and sub-category fields outline the organization of the answers within the knowledge base. These fields basically define a "grid" that divides your knowledge base into sections. It is not necessary that you utilize all four fields in organizing your knowledgebase – some applications only use one field, such as category, whereas other sites use products, sub-products, and categories. When working with products and categories, avoid creating combinations of products and categories that do not contain answers and avoid creating combinations that overlap information.

For example, assume a software company has five software packages. Each package could be considered a product with the version number of the software represented by the sub-product. Categories for the products could include Installation, General, How To, and Troubleshooting. Each category applies to each software product. You cannot have different categories for different products. In addition, for your public answers, you may want to display only products or only categories, depending on the amount and type of information presented.

Your site visitors search for information using drop-down menus for the Product, Sub-product, Category, and Sub-category fields if you choose to display the menus. Your goal is to make your answers as easy to find as possible; therefore, your products and categories should be distinct and logical. Customers must be able to easily select products and categories without spending an

inordinate amount of time deciding between choices. Identify what you think your customers will be looking for and then define your products and categories based on what will make sense to them.

We recommend starting with a relatively small number of products and categories -- five or six is a workable number. If you use sub-products, make sure each product has at least one sub-product. As your knowledge base grows, you can create new areas as necessary.

## **Define Additional Custom Fields**

In addition to products and/or categories, you can create custom answer fields to establish additional areas of information that are not suitable for products and categories. Typically, custom fields are quite useful for the “behind the scenes” management of your knowledge base at the Answer Console. That is, custom fields can be used to capture information about your answers that you may not need or want to display to your end users.

Examples of useful custom answer fields include:

- A menu field to specify whether file attachments are included with the answer, or more specifically what type of file attachment is attached to the answer.
- A menu field to identify the type of work that needs to be done on the answer, such as: complete, major edits, minor edits, verify content, or further research needed.
- A text field to list URLs, links, and graphics included in the answer.
- Date fields to specify when the answer was initially published and when the content was last formally reviewed.

Custom fields allow you to easily define characteristics associated with your answers so that you can create custom reports or custom views at the Answer Console to get an overview as to the state of the answers in your knowledge base.

## **Develop Writing and Style Guidelines**

Style guidelines and standards are just as important for the answers in your knowledge base as they are for any printed documentation. By using consistent terminology, style, and formatting in your knowledge base, your customers have an easier time understanding and finding information, and extracting pertinent details from the answers.

More than likely, several people, if not your entire support staff, will be responsible for proposing answers and content to your knowledge base. By establishing and posting writing style guidelines and standards, you can reduce editing time of proposed answers and create a more efficient process for publishing answers. Similarly, you may have several people responsible for editing and publishing answers to your end-user pages. They, too, must be familiar with the style guidelines established for your site so that your answers are congruous with one another and with the content of your general Web site.

A good starting point for drafting knowledge base guidelines is to use your company's current standards. You can then add or eliminate guidelines as necessary. If your organization does not have current writing and style standards, answer the following questions when developing general standards for your knowledge base:

- What company and industry terminology will be included?
- What specific words and terms need to be capitalized?
- What terms need to be defined on first use?
- What, if any, words or phrases should be set in bold, italics, or underlined to set them apart from other text? You might consider using a different color or font as well.

**Note:** Remember to highlight in moderation; if you overuse this feature, nothing stands out and your text becomes “busy” and difficult to read.

- What blocks of text and numbered or bulleted lists should be indented?
- Do you want to incorporate HTML to add formatting, graphics, and hyperlinks? If so, you should develop coding guidelines to standardize when formatting will be used.
- If you include graphics, how will you capture the graphics? What format and dpi will you use?

In addition to the guidelines you and your staff develop, consider the wording and terminology used in your answers. Typically, published answers are more general in content than the specific assistance requests submitted by your customers to allow for a broader audience.

## **Designate Responsibilities for Managing the Knowledge Base**

The amount of time needed to manage your knowledge base depends on its size, how quickly it grows, and how quickly information becomes outdated. As you allocate personnel resources, keep in mind the central role that the knowledge base plays in your customer service solution. The greater the content and quality of information you make available and easily accessible from your eService Center site, the more your customers will use this self-service tool.

Consider the following options for assigning the management of your knowledge base:

- Assign the task to a lead customer support representative as a part of their duties.
- Create a position in which the primary duty is managing public answers.
- Establish a knowledge base group that periodically reviews and maintains the knowledge base.

Once you have identified who will manage your answers, you can then define the process for proposing new answers and determine which staff members need to have access to the Answer Console to review and edit proposed answers.

## Define a Process for Proposing New Answers

Frequently, the need for a new public answer comes from a question submitted by a customer. A CSR responds to the individual question with specific information requested by the customer, and the incident is resolved. When the CSR recognizes the need for a public answer, they can propose that the incident be published as an answer to your end-user pages. When the CSR clicks the Propose button from the Incident Console, the incident is copied to the Answer Console with a status of proposed, and the answer is assigned an answer ID for reference. Another option to use for proposing incidents is to create a custom incident field at the Incident Console as a means of flagging incidents to be considered and reviewed. The CSRs can set the field to "Review" and then the knowledge base manager can review the flagged incidents and decide which ones to actually propose to the Answer Console.

In order to publish an incident as an answer, the Summary, Question, and Answer fields typically need to be generalized to cover a broader topic scope. In addition, determine if the answer should be assigned to additional product and category values. In this stage, you will need to establish a specific process for making a resolved incident into an answer to be viewed publicly.

In addition to proposing existing incidents submitted by your customers, at times it may be necessary to create new answers at the Answer Console itself. This is particularly common in preparing new answers to support the release of new products or programs offered to your customer base. Typically, new answers are added by your knowledge base manager or group and are then edited, reviewed and published accordingly.

As you develop a process to fit your specific needs, answer these questions:

- Who will be responsible for identifying when additional answers should be added to your knowledge base?
- Who will be responsible for creating new answers that do not arise from end-users?
- Who will be responsible for editing proposed answers and publishing them on your Answers page?
- If you incorporate HTML into answers, who will add this code? Consider which staff members have these skills.

## Define an Approval Review Process for New Answers

Once an answer has been proposed for public use, you may want staff members from different areas within your company to review the information to ensure technical accuracy of the methods and procedures defined in the solution. Coordinating this review process and combining the edits would most likely be the task of the person responsible for publishing the answers.

For example, if you are adding answers to your knowledge base related to functionality of a new product or added functionality to a product upgrade, you might want the manager or development group lead to review and approve the content of the answer before making it public. Similarly, if your answer includes a reference to contact a specific department under certain conditions, the supervisor of the department may want to review and comment on the content of the answer before it is set for public viewing.

## Determine Responsibility for Publishing New Answers

In order for an answer to be visible on the end-user pages, the following conditions must be met when the answer is saved:

- If categories are defined, the answer must be assigned to a category visible to the end-user pages for the interface (including sub-categories, if defined).
- If products are defined, the answer must be assigned to a product visible to the end-user pages for the interface (including sub-products, if defined).
- The answer status must be a public status type as defined in the Answer Statuses table.
- The access level must be visible to the interface as defined in the Answer Accesses table.
- The language must match the language used for the interface (if multiple languages are used on your site).

Depending on the review process for your answers, you must define who is responsible for actually publishing each answer to your site's end-user pages.

Another factor in providing information quickly to your customers is to determine where to place new answers on the Answers page. From the Editing Answer page, or from the Add New Answer page if you are creating a new answer, you can set the position of a new answer relative to other answers on the Answers page. You can choose to place new answers at the top, middle, or bottom of the Answers list, or fix them at the top, middle, or bottom.

If you wish to give added visibility to newly published answers, place them at the top and then allow their historical usefulness to dictate their future placement. In this way, customers will be aware of new answers as you publish them. Note that when you place an answer at the middle of a list, the solved count is set to be half of the maximum solved count, which may not correspond to a value in the true middle position on your list. In fact, in many cases, when you place an answer at the middle of the list, the answer may still display on the front page of answers. Refer to the RightNow eService Center Customer Service Guide for more information about display position.

## Notify Staff of New Answers

As new answers are added to your knowledge base and out-of-date answers are removed or updated, you may want to create a few custom reports that display these changes. In general, the easiest way to capture this type of information is to create custom answer fields for the date published, the date of the last content review (this may or may not be the same as the system defined Last Updated value), and the date that the answer was removed from public display. By defining and using these custom fields, you can easily create custom reports to identify answers that have been published, updated, or removed in a recent timeframe.

You can also subscribe staff members to receive these reports on a regular basis. In that way, staff members can be kept up-to-date on new issues and the growth of the knowledge base. For more information about custom reports, see the RightNow eService Center Reference Guide.

## Evaluate Customer Feedback

RightNow eService Center allows your customers to provide feedback on public answers that do not completely solve their issues. This feedback can be quite valuable for understanding customer needs and tailoring your answers. Refer to the ADP\_FEEDBACK\_URL configuration setting to enter a URL for the feedback form. The path to this setting is: Management and Configuration > Settings > RNW User Interface > Answer Display Page > Feedback > ADP\_FEEDBACK\_URL.

When the answer feedback feature is enabled, a pop-up window displays if a site visitor indicates that an answer was not completely satisfactory. Feedback from site visitors creates an incident at the Incident Console, which can be routed and assigned using workflow rules. This allows you to assign incidents created from answer feedback to your knowledge management group.

If you choose to enable the answer feedback, you must decide who is responsible for reviewing the feedback and updating the answers accordingly. In some instances, customer feedback can be incorporated directly into an answer; in other cases, new answers may need to be created.

## Establish a Process for Reviewing Existing Answers

Over time, the content of your answers may become outdated. Consequently, answers should be reviewed with some frequency to ensure their content is current, relevant, and useful. You may wish to review answers at a set frequency, such as every six months, or you may wish to review answers to coincide with new product releases or upgrades. By default, the AR\_DATE\_ENABLE configuration setting is enabled, which displays the Review On date fields when adding or editing an answer. The path to this setting is: Management and Configuration > Settings > RNW Common > Answer Review > AR\_DATE\_ENABLE. From the Editing Answer page or the Add New Answer page, you can set a specific date to review a particular answer. On the review date, the status of the answer changes from Public to Review.

When reviewing answers, evaluate each for usefulness and update the content with current information. This is a central component with regard to maintaining your knowledge base. To ensure proper maintenance of your knowledge base, determine a strategy for setting review dates and determine who will be responsible for this continual review process.

Based on the review, you may decide that the answer should no longer be displayed to your end-user pages. While you could delete older answers, you may wish to simply archive them so that you can refer to them later if deemed necessary. To archive answers that you have pulled from your site, create a custom answer status in the Answer Status table named Archive and set it to be a private status type. Then, to archive the actual answer, open the answer for editing and set the status to Archive.

## Using HTML with Published Answers

RightNow eService Center contains several advanced features for creating dynamic, well-designed answers by incorporating HTML code into your published content. With HTML, you can format your text and add tables, graphics, lists, and hyperlinks. A working knowledge of HTML code, including syntax and how to use it, is necessary to fully understand and implement these design features.

RightNow eService Center includes three options for including HTML when editing the question and answer fields in a published answer. You can use HTML to include text formatting, tables, bullets, numbered lists, images, and links in your answers. In order for HTML tags to be rendered (turned into HTML format), use one of these features:

- HTML WYSIWYG editor (if using version 5.5.2 and higher)
- `<as-html>` and `</as-html>` tags
- PC\_ESCAPE\_TAGS configuration setting

If you do not use these features, any text you type in the description and solution fields, including HTML code, will be displayed exactly as you type it when adding or editing an answer. This allows you to include examples of computer code or commands in your answers, if necessary, without that code being rendered.

**Note:** In version 5.x, these features only work when publishing answers from the Answer Console. These features do not work when replying to incidents at the Incident Console.

### HTML WYSIWYG Editor (version 5.5.2 and higher)

Beginning with version 5.5.2, eService Center allows you the option of enabling an HTML “what-you-see-is-what-you-get” editor, also referred to as a WYSIWYG editor. When the HTML EDIT\_ENABLED configuration setting is enabled, you can select the HTML editor or the standard text editor for use by selecting the appropriate radio button from the Add New Answer or Edit Answer page. The HTML EDIT\_DEFAULT setting allows you to specify whether the HTML editor or the text editor should be used as the default when adding or editing an answer. The path to these settings is: Management and Configuration > Configuration Editor: Settings > RNW User Interface > Misc. Customization > HTML Editor.

The HTML editor allows you to highlight text and visually edit the style and format of the text in a manner similar to using a word processing program. The editor creates the HTML code based on how the text is formatted and saved. When working in the HTML editor, do not toggle between the HTML and Text radio buttons to review the underlying HTML code. Instead, use the “View as WYSIWYG” and “View as HTML” icons located in the HTML editor itself.  

## <AS-HTML> Tag

The <as-html> tag signals eService Center to render any HTML code in the question and answer fields so that the answer display can contain special formatting and font styles. For example, if you want to create a table within an answer solution, you would preface the HTML code with <as-html> and follow the HTML code with </as-html>. In this way, a table will be displayed when the answer is viewed on the end-user pages.

To use these tags, place the <as-html> tag before the HTML code you want to be rendered and follow the code with the </as-html> tag. Any text outside the <as-html> and </ as-html > tags will be displayed exactly as it is typed. Once you have opened the <as-html> tag, you can add any HTML code you wish, including images and links to other Web pages.

## PC\_ESCAPE\_TAGS Configuration Setting

The PC\_ESCAPE\_TAGS configuration setting allows you to specify HTML tags that will be automatically rendered when you include them in an answer – even without using the <as-html> and </as-html> tags described in the preceding section. The path to this setting is: Management and Configuration > Configuration Editor: Settings > RNW User Interface > Misc. Customization > Page Content > PC\_ESCAPE\_TAGS. If you frequently use a specific HTML tag in your answers, you can include it in the PC\_ESCAPE\_TAGS configuration setting so that any time you use the tag in an answer, the HTML will be rendered.

For example, if you enter b for the bold tag (<b>) in the PC\_ESCAPE\_TAGS setting, the text within the opening and closing bold tags will be displayed in bold when you use the <b> and </b> tag in an answer. If you do not include b in the PC\_ESCAPE\_TAGS setting (and do not use the <as-html> and </as-html> tags), the <b> will not be rendered as HTML, but will be displayed as the text “<b>” in the answer.

If you enter HTML tags in this configuration setting, you do not need to preface these HTML tags with <as-html> or follow them with </as-html>. This allows you to quickly implement the tags that you use most frequently.

To enter tags in the PC\_ESCAPE\_TAGS configuration setting, type the tag text without the wickets. For instance, the <a> tag is entered as a, and the <img> tag is entered as img. By default, the hyperlink tag <a> and the image tag <img> are included in the PC\_ESCAPE\_TAGS setting. Tags are separated by commas in the configuration setting.

## HTML References

Some HTML tags can easily be incorporated into your answers without a lot of time or extensive knowledge of HTML code. This section briefly explains a few common HTML tags to answers. A working knowledge of HTML code, the syntax, and how to implement it is necessary for understanding this section.

**Important! This section is provided only as a reference to you.** RightNow Technologies Technical Support staff do not provide support for HTML coding issues. For assistance with HTML issues specific to your site, please consult your company's Webmaster. RightNow's Professional Services group offers customization to your site for a fee. For more information on options and pricing, please contact your sales account manager.

### Commonly Used HTML Tags for Answers

When working with HTML code, the HTML tags are not case sensitive. For example, `<B>` and `<b>` are both acceptable as the opening bold tag. In general, it is more common to use capital letters when using HTML code so that it is easier to distinguish the code from the actual content (text) involved.

When entering HTML code into an answer, in order for your HTML code to be interpreted as HTML when it is displayed, you must use either the `<as-html>` tag or the `PC_ESCAPE_TAGS` configuration setting.

Name of Tag	Format / Attributes	Reason for Use
Paragraph tag	<code>&lt;p&gt; ...&lt;/p&gt;</code>	This tag specifies the beginning of a new paragraph
Break tag	<code>&lt;br&gt;</code>	This tag specifies the beginning of a new line
Bold tag	<code>&lt;b&gt; ... &lt;/b&gt;</code>	This tag creates bold text.
Italic tag	<code>&lt;i&gt; ... &lt;/i&gt;</code>	This tag creates italic text.
Underline tag	<code>&lt;u&gt; ... &lt;/u&gt;</code>	This tag creates underlined text.
Ordered list tag	<code>&lt;ol&gt; ... &lt;/ol&gt;</code>	This tag creates a left-indented and sequentially numbered, ordered list. Use the <code>&lt;li&gt;...&lt;/li&gt;</code> tag to identify each list item.
Unordered list tag	<code>&lt;ul&gt; ... &lt;/ul&gt;</code>	This tag creates a left-indented, unordered list. Use the <code>&lt;li&gt;...&lt;/li&gt;</code> tag to identify each list item. List items are displayed with bullets.
List item	<code>&lt;li&gt; ... &lt;/li&gt;</code>	Identifies each item in an ordered (numbered) or unordered list.

Name of Tag	Format / Attributes	Reason for Use
Blockquote tag	<code>&lt;blockquote&gt; ... &lt;/blockquote&gt;</code>	This tag creates a block of text that is indented on both the left and right and double-spaced between previous and following paragraphs.
Heading tag	<code>&lt;h1&gt; ... &lt;/h1&gt;</code>	This tag creates headings of different sizes: <code>&lt;h1&gt;</code> is the largest heading size and <code>&lt;h6&gt;</code> is the smallest heading size.
Superscript tag	<code>&lt;sup&gt; ... &lt;/sup&gt;</code>	This tag creates superscripts.
Subscript tag	<code>&lt;sub&gt; ... &lt;/sub&gt;</code>	This tag creates subscripts.
Font tag	<code>&lt;font face=...size=... color=...&gt; ...&lt;/font&gt;</code>	This tag enables you to change text style, size, and color. Refer to “Font Tag Attributes” below.

## Font Tag Attributes

The font tag `<font>` allows you to change the size or color of Web page fonts. `<font>` is a nonempty tag; all text between the opening and closing tags is affected.

- `<font>` has two associated tag attributes; both have multiple value ranges
- `<font>` requires at least one attribute

The value range of the size attribute is 1-7. These values can be specified as either absolute or relative values. To specify an absolute value, choose a number between 1 and 7 (`<font size=4>`). The relative value range is between -7 and +7, excluding 0 (`<font size=+4>`).

<code>&lt;font&gt;</code> Attribute	Description	Values
size:	Text size	1-7 (absolute values; no direct mapping to point or pixel sizes) : <code>&lt;font size="2"&gt;</code>  +1-7/-1-7 (relative values; no direct mapping to point or pixel sizes) : <code>&lt;font size="+3"&gt;</code>
color:	Text color	One of 16 color names (black, green, silver, gray, white, maroon, red, purple, fuchsia, lime, olive, yellow, navy, blue, teal, aqua) : <code>&lt;font color="red"&gt;</code>  RGB hexadecimal notation codes
face	Text font	Any TrueType font name. This attribute defines a comma-separated list of font names in order of preference: <code>&lt;font face="verdana,arial,impact"&gt;</code>

## Adding Graphics to an Answer

You can incorporate graphics into your published answers to provide the most comprehensive information to your customers. Graphics typically end with a .gif or .jpeg extension. The .gif and .jpeg image formats are the most popular formats used for the Web and are supported by most Web browsers. In general, you want to use the images formats that are widely supported; otherwise, the images may not appear correctly when viewed by your customers. By default, the a and img tags used for hyperlinks and images are included in the PC\_ESCAPE\_TAGS setting.

To include a graphic in an answer, use the following syntax:

```

```

**Note:** Images and Web files that you choose to link to should be stored on your company's server. These files are not stored by RightNow Technologies. Consult your company's webmaster for specific locations of images and files.

## Adding Hyperlinks to an Answer

Hyperlinks allow you to create dynamic answers that can link end-users to other locations on the Internet. When linking to a file, such as a pdf or document, the file should be stored on your server, not on the RightNow Technologies hosted servers. Consult your company's webmaster for specific locations and directories to be used for public files.

To add a hyperlink, use a hyperlink tag in the desired location of the Answer field using the following syntax:

- To link to a **file**:

```
<a href="http://<servername>/<directory>/<filename>">Text that you want user to see</a>
```

- To link to a **Web page**:

```
<a href="http://URL_of_interest.com">Text you want the user to see</a>
```

You can also link from one public answer to another public answer within eService Center.

- To link to **another published answer in eService Center**:

```
<answer_xref id="y" text="Text you want the user to see" />
```

where "y" is the Answer ID that you want to link to.

**Note:** When linking to another answer, the format is very specific and requires the double-quotation marks, spacing, and forward slash / as indicated. You may remove the text="Text you want the user to see" component to simplify the link format. When simplified, the format is: <answer\_xref id="y" /> and the link is displayed as [Click here](#).

## Using Variables with your Knowledgebase

If you use specific text or code frequently, such as standard images, common links, or corporate policies, you can create answer variables to replace larger blocks of text or HTML code. For example, if you use a standard corporate logo in several answers, you can create an answer variable that defines the graphic filename and path.

To create an answer variable, select Answer Variables from the Management and Configuration page. Enter the name of the variable and click Add. Click Edit next to the variable you just added, and in the Value field, enter the text or HTML code that you would like to display when the variable is entered in an answer. Click Save when you have defined your variable.

For example, a variable for a company logo might be configured similarly to the format below:

**Name:** logo

**Value:** 

With a variable defined in this way, you can enter **\$logo** in your answer and the graphic will be displayed. Using a variable allows you to update the graphic, either the filename or the path, without having to edit all answers that contain that graphic.

**Note:** When using HTML in a variable, be sure to use the <as-html> or PC\_ESCAPE\_TAGS configuration setting so that the HTML in the variable is rendered.