

The Basics: Introduction to Knowledge Base Management

Penni Kolpin, Knowledge Engineer



Agenda

- End-user considerations
- Key processes
- Useful tools and feature in RightNow
- Tips and suggestions
- Evaluation methods



End-user Considerations

- Who is your audience?

General public, customers, partners

- What information do they need?

Product lines, services, topics of interest

- How will they use your site?

Navigation, menus, searches, links

- What level of experience?

Amount of detail, style, terminology



End-user Page Configuration

- Answers list page view
 - Search options
 - Answer grid
- Answer display page
 - Additional fields displayed
 - Related and previously viewed answers
 - Answer feedback
 - Password-protection



Answer List Page

Support Home Answers Ask a Question My Stuff Login Help

Search Browse

Product ⓘ
All

Keyword Search Search Tips

Search

Category ⓘ
All

Search By
Phrases



Powered by RIGHT NOW

32 Answers Found Page: 1 of 3 Go

	Summary	Score
1	What is a credit limit?	146
2	About Inside Wire Maintenance	64
3	Type of ADSL Modem	56
4	How do I order WorldConex long distance service?	43
5	Call Waiting Interactive Tutorial	42
6	RightNow Service Brochure	35
7	Smartguide Sample	35
8	What is Remote Call Notification?	31
9	Questions about Long Distance	28
10	Able to make local, but not long distance calls	24
11	RightNow CRM Brochure	19
12	RightNow Analytics Brochure	16
13	What is ONE-BILL?	15
14	Setting up Voice Messaging Service	14
15	Changing or Resetting Your Voice Messaging Passcode	14



Answer Display Page

Answer ID 59	What is ONE-BILL?
Date Created 08/20/2004 01:47 PM	Question What is ONE-BILL?
Last Updated 03/30/2005 10:58 AM	Answer ONE-BILL is a billing option for paying your WorldConex Wireless and your WorldConex local calling services from one statement.
Access Level Everyone	Your ONE-BILL® monthly statement includes complete calling details about your wireless and local calling services. A summary page shows the total charges for local calls, wireless calls and any other charges that currently appear on your local bill. Other pages provide details for each WorldConex and WorldConex Wireless call.
 Print Answer	There is no charge to enroll in ONE-BILL, but there are requirements that must be met. Enroll in ONE-BILL online or call your local business office .
 Email Answer	ONE-BILL is currently available in Arizona, California, Connecticut, Delaware, District of Columbia, Florida, Hawaii, Idaho, Illinois, Indiana, Maine, Maryland, Massachusetts, Michigan, Nevada, New Hampshire, New Jersey, New York, North Carolina, Ohio, Oregon, Pennsylvania, Rhode Island, South Carolina, Texas, Vermont, Virginia, Washington, West Virginia, and Wisconsin.
	<input type="checkbox"/> Notify Me by Email if this Answer is Updated
	How well did this answer your question?
	<input type="radio"/> 100% <input type="radio"/> 75% <input type="radio"/> 50% <input type="radio"/> 25% <input type="radio"/> 0% <input type="button" value="Submit Rating"/>
	Previously Viewed Answers
	<ul style="list-style-type: none">● Smartguide Sample



Related Breakout Sessions

- Advanced Knowledge Base Concepts:
Optimizing the Self-Service Experience

Searches, indexing, weights, aliases

Tuesday 1:45 – 3:00

- Fine-Tuning Your RightNow Knowledge Base

Tuesday 3:30 – 4:45



Answer Content

- Amount of information per answer
- Level of content – summary or detailed steps
- Terminology – within and between answers
- Acronyms
- Trademarks
- Active voice
- Grammar – spelling, punctuation, capitalization



Answer Display

- Scannability
- Clear and consistent links
- Short paragraphs and concise sentences
- Keyword highlighting – bold, color, italics
- Layout formatting – headings, tables, lists bullets, block quotes
- <http://webwritingthatworks.com>



Key Processes: Getting Started

Propose
Content

Editing and
Formatting

Review and
Approval

Publish
Answer

- Identify key views to access answers



Proposing Content

- Source of answer content
 - Internal: incidents
 - External: email, manuals, training materials
- Propose button at Support Console
- Custom field to flag incidents to review
- Rules to route proposed answers



Alternate Propose Process

Support Console

Quick Search ▾ Review for Answer Refresh Search Fill New ▾ Edit ▾ Delete ▾ Print ▾ Forward

Viewing Review for Answer Records Found: 8

Incident#	Contact	Subject	Created	Status	Due Date	Source	
1	241	Simon Kelly	remote voice	12/20/2005 03:0	Updated	12/20/2005 04:1	Email
2	236	Jason Vasilas	How do I change my billing information...	12/08/2005 09:4	Updated	12/08/2005 05:1	Ask a Quest
3	233	Jean Cornish	I am looking for information on pay as you go bur	11/02/2005 07:4	Unresolved	11/02/2005 04:1	Ask a Quest
4	231	Paul Leith	Do you offer coverage in my area...	11/01/2005 12:4	Solved	11/02/2005 10:1	Ask a Quest
5	229	Jean Cornish	What are the data transfer rates over mobile phc	10/31/2005 06:4	Solved	10/31/2005 04:1	Ask a Quest
6	226	Azora Brown	Who do you partner with?...	10/27/2005 11:0	Solved	10/28/2005 09:1	Ask a Quest

Reference #
051208-000000

Primary Contact
Jason Vasilas
j_vasilas@yahoo.com.invt
Acme Tool & Die, Inc.

Status
Updated

Assigned
CRM
Chris R. Morris

Product

Category

Disposition
Routed to Sales
Immediate follow up

Messages **Details** Organization Contact RMA Track FedEx Order Track

Interface pkolpin_beg Language English (US) Mailbox -- Source Ask a Question

Custom Fields

Review for Answer Review for Answer **Tracking Number** 790851545672

Follow-up Method

-
- No Review
- Review for Answer**
-
- Published New Answer
- Exists Already
- Reviewed - Not Published

Files Session Audit Log View in Separate Window



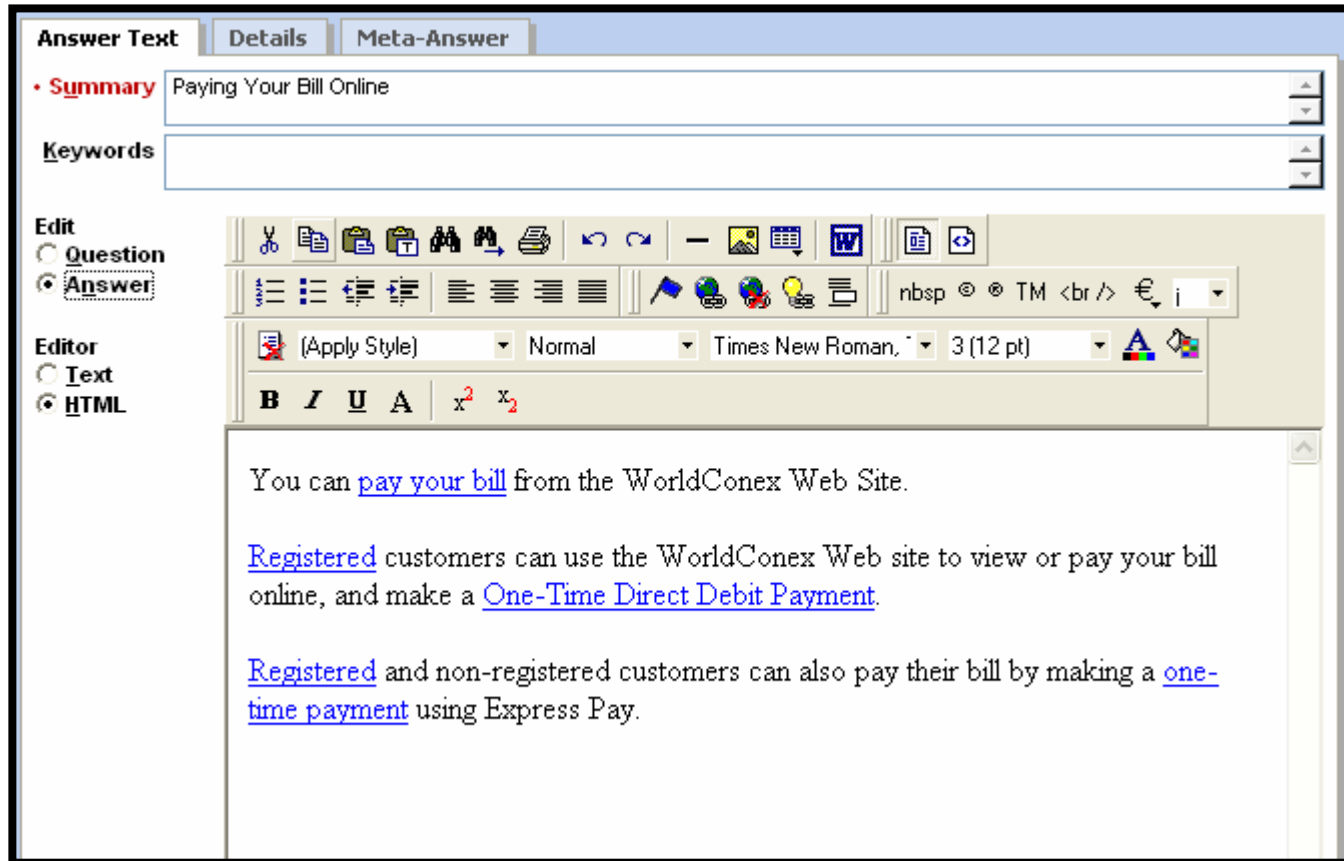
Editing and Formatting Content

- Use your style guidelines
- HTML formatting
- Generalize content for wider audience
- Expand content to broaden scope
- Links to other answers and web pages
- Common headings and text
- Keywords and aliases
- Preview feature



HTML Editor

- HTML or Text mode



The screenshot displays an HTML editor interface with the following components:


- Summary:** A text box containing "Paying Your Bill Online".
- Keywords:** An empty text box.
- Edit Mode:** Radio buttons for "Question" (unselected) and "Answer" (selected).
- Editor Mode:** Radio buttons for "Text" (unselected) and "HTML" (selected).
- Toolbar:** A comprehensive set of icons for editing, including cut, copy, paste, undo, redo, bold, italic, underline, link, unlink, list, and image.
- Formatting:** A dropdown menu for styles (set to "Normal"), a font family dropdown (set to "Times New Roman"), and a font size dropdown (set to "3 (12 pt)").
- Text Content:** The main editor area contains the following text:

You can [pay your bill](#) from the WorldConex Web Site.

[Registered](#) customers can use the WorldConex Web site to view or pay your bill online, and make a [One-Time Direct Debit Payment](#).

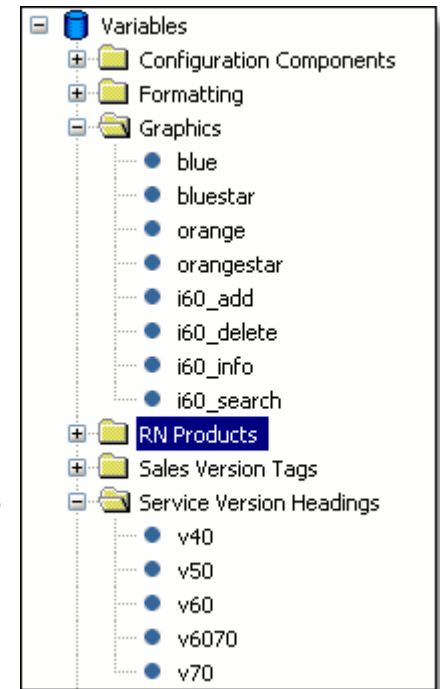
[Registered](#) and non-registered customers can also pay their bill by making a [one-time payment](#) using Express Pay.

Editing Tool: Answer Links

- Icon in HTML editor 
- `<answer_xref id="y" />`
 - text = "Custom text for link"
 - title = "Title used with mouse-over"
 - target = "new" to open in new window
 - anchor = "#anchorname"
- Also, HTML links to web documents

Editing Tool: Answer Variables

- \$variablename
- Shortcut for specific text or code
- Up to 4000 characters
- Uses: images, product names, policies headings, common HTML, URLs
- Use “non-words” to find answers with that variable



Editing Tool: Custom Fields

- Track administrative information
- Original content owner
- Primary editing owner
- Links included in answer
- Manual reference
- Custom notes fields
- Special characteristics



Review and Approval

- Management or content owner approval
- Access to Answer Console
 - Reassign answer with custom status
 - Rules or scheduled alerts to notify
- No Access to Console
 - Preview answer and copy content in email
 - Print answer for manual review



Publish Answer

- Make sure fields set to allow visibility
 - Products and categories (lowest level visible)
 - Access level end-user visible
 - Language field set
 - Public status type
- Additional considerations
 - Publish On and Review On fields
 - Custom field for date published
 - Last Content Update field



Publishing Answers

Answer ID
53

• Status
Public

• Language
English (US)

Access Level
Help
Everyone
Gold
Internal
Dealer

Assigned
Sales Consultants
Keir Barbe

Review On
[]

Publish On
[]

Display Position
Historical Usefulness

Answer Text | **Details** | **Meta-Answer**

Custom Fields

Last Content Review 7/11/2006

Date Published 3/8/2005

Content Owner []

Review Status --

Links Included --

Notes

Files | **Audit Log**

Name	Size

Answer Text | **Details** | **Meta-Answer**

• Summary What is the cost of the Cable Modem for Internet Access

Product

- Voice Services
- Mobile Phones
- Modem Services
- Data Services
 - FlexConex Ethernet
 - Tips
 - Troubleshooting
 - FlexConex VPN
 - WiFiConex Hot Spots
 - RightNow CRM v7.0

Category

- General
- Account and Billing
- DSL and Internet Service
- How Do I ... ?
- Long Distance
- Manage My Account Onl
- Product Guides
- Troubleshooting
- Request Repair
- Voice Messaging



Additional Process

Propose
Content

Editing and
Formatting

Review and
Approval

Publish
Answer

- Now what?

Ongoing
Maintenance
and Review



Updating Content

- Answer feedback
 - Route incidents to answer team
- Agent feedback
 - Similar to proposing new answers
 - Flag incident with note / template
- Proactive maintenance
 - Review each answer per schedule
 - Update content as needed



Answer Feedback

Provide Feedback on this Answer

Answer (Rated Helpfulness: 50%)
What is a credit limit?

Contact Information (required)
* **Email Address:**

How Could this Answer be Improved?

If

1 Incident.Source equals Delete Condition

Then

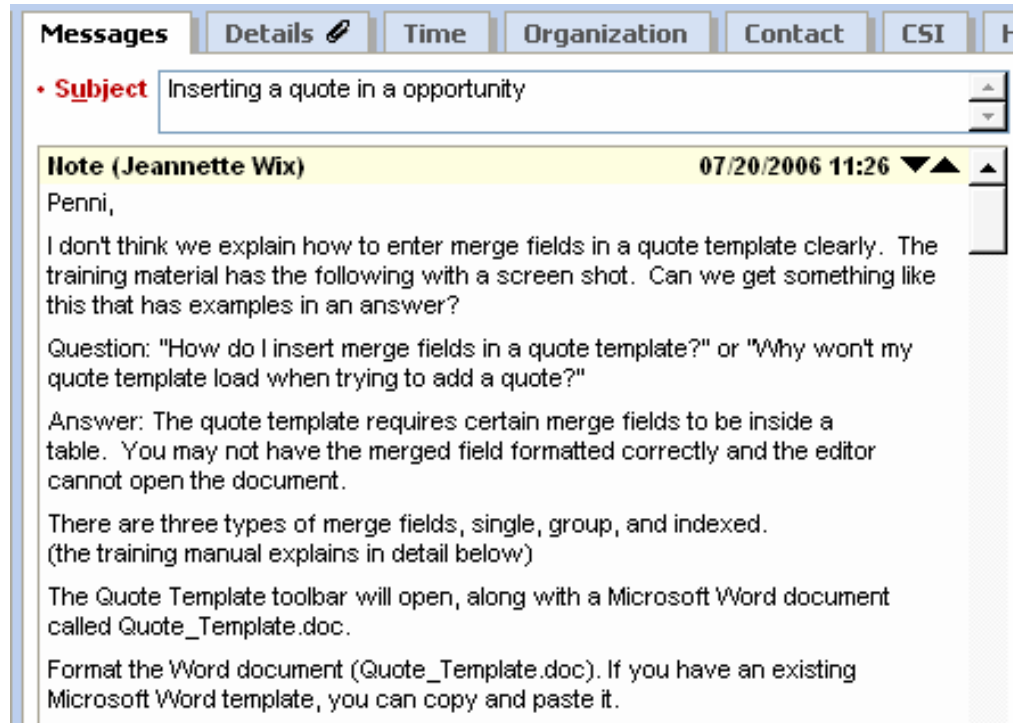
1 Assign incident to staff member assigned the answer Delete Action

- Use rules to route incident to owner of answer



Agent Feedback

- Use custom field to flag incident
- Internal note to indicate update needed and answer ID



The screenshot shows a CRM interface with a message and an internal note. The message is titled "Inserting a quote in a opportunity" and is dated 07/20/2006 11:26. The internal note is titled "Note (Jeannette Wix)" and contains the following text:

Penni,
I don't think we explain how to enter merge fields in a quote template clearly. The training material has the following with a screen shot. Can we get something like this that has examples in an answer?

Question: "How do I insert merge fields in a quote template?" or "Why won't my quote template load when trying to add a quote?"

Answer: The quote template requires certain merge fields to be inside a table. You may not have the merged field formatted correctly and the editor cannot open the document.

There are three types of merge fields, single, group, and indexed. (the training manual explains in detail below)

The Quote Template toolbar will open, along with a Microsoft Word document called Quote_Template.doc.

Format the Word document (Quote_Template.doc). If you have an existing Microsoft Word template, you can copy and paste it.



Proactive Maintenance

- Schedule content review – by product or category
- Review for major rollout
- Use custom field or custom status to indicate type of edits / updates needed
- Store new content in notes field ahead of time
- Replace content on schedule
- Shows overall state of review process



Proactive Maintenance

- Custom menu field identifies work to be done

The screenshot shows a software interface with three tabs: 'Answer Text', 'Details', and 'Meta-Answers'. The 'Details' tab is active. Below the tabs is a section titled 'Custom Fields' with a blue header and an expand/collapse icon. The fields are:

- Date Published:** 8/1/2000
- Last Content Update:** 11/22/2004
- Editing Owner:** --
- Content Owner:** (empty text box)
- General Content Type:** Rules
- 8.0 Prep Status:** Major Add Screenshot
- Review Status:** (dropdown menu open)

The 'Review Status' dropdown menu is open, showing the following options:

-
- Check Content
- Complete
- Minor Edit
- Minor Last Month Updates
- Major Edit
- Major Add Screenshot (highlighted)
- Major Needs New Answer
- Initial Solution Copied
- Solution Copied
- Verify on Release

Below the 'Custom Fields' section is a 'Notes' section with a text area containing the text: '7/27/06 MP - has 5.5 scree...'. At the bottom of the interface, there are radio buttons for 'Files' (selected) and 'Audit Log', and a 'View in Separate Window' button. Below these is a table header with columns: 'Name', 'Size', 'Content Type', and 'Created'.



Proactive Maintenance

Answer Console

Quick Search ▾ Group_8.0_Status Refresh Search New ▾ Edit ▾ Delete ▾ Print

Viewing Group_8.0_Status: Top Level Groups: 9 (containing 1002 records)

	8.0 Prep Status	Count
1	Verify on Release	105
2	No Value	655
3	Minor Last Month Updates	3
4	Minor Edit	155
5	Major Needs New Answer	4
6	Major Edit	1
7	Major Add Screenshot	3
8	Complete	53
9	Check Content	23



Storing Updated Content

Answer ID
57

• Status
Public

• Language
English (US)

Access Level
Help
Everyone
Gold
Internal
Dealer

Assigned
Admins
Administrator

Review On
[]

Publish On
[]

Display Position
Historical Usefulness

Answer Text | **Details** | **Meta-Answer**

Custom Fields

Last Content Review 5/24/2006

Date Published 10/15/2004

Content Owner Shawna Green

Review Status Solution Copied

Links Included Answers and Web pages

Notes

UPDATED CONTENT WITH NEW LINKS:

<p>You can pay your bill from the WorldConnex Web Site.</p>

<p>Registered customers can use

Files **Audit Log** [View in Separate Window](#)



Reports: Additional Feedback

- Standard reports
 - Answers Viewed
 - Keyword Search
 - Service Summary
 - Information Gap
- Custom reports
 - Answers published weekly
 - Answer subscribers
 - Review status
 - Custom field based
- Define report subscriptions and frequency



Keyword Search Report

Keyword Searches Phrase Stem

Phrase Stem	Search Count	Answers
CASTL	10	0
1889	9	0
486	8	0
REQUEU	7	0
SYSDAT	6	0
68	6	0
OHTANI@RIGHTNOW.MITSUI.CO.JP JALCARD	6	0
OHTANI@RIGHTNOW.CO.JP.WESTJAPAN	6	0
COLOUR	6	0
INTV_TYP	5	0
1124	5	0
A_SUGGEST_LIMIT_CAT_LVL	5	0



Answers Viewed Report

Answers Viewed

Answers

Top Level > 2006/30

Answer #	Summary	Hits	0%	25%	50%	75%	100%
1350	RightNow manuals and release documentation	374	0	0	0	0	0
1772	Clearing RNT control files and ActiveX components	121	0	0	0	0	0
31	System requirements to run RightNow products	96	0	0	0	0	0
2014	Accessing the 7.x RightNow Tutorials	81	0	0	0	0	0
1488	Best practices for using RightNow Service	58	0	0	0	0	0
635	What do the classes in the enduser.css style sheet file affect?	49	0	0	0	0	0
479	RightNow Service Tutorials and Computer-Based Training (CBT)	49	1	0	0	0	1
1650	Uninstalling / reinstalling the HTML editor	43	0	0	0	0	0
514	Customizing the Answer Display page	42	0	0	0	0	0
1575	Accessing the RightNow Integration manual	40	0	0	0	0	0
331	Setting up a mailbox for RightNow Service	38	0	0	0	0	0
639	Linking to a populated end-user page	36	0	0	0	0	0
2308	Why do some users get a Failed to Load Messages error when logging in?	35	0	0	0	0	0
2412	Workstation and Network Data Collector (rntinfo.bat file)	33	0	0	0	0	0
2345	Barracuda SPAM filters on hosted Service mailboxes?	32	0	0	0	0	0
1108	Editing email messages sent by RightNow Service	31	0	0	0	0	0



Answers Published

Answers Published Last Week

Properties Filters **Output** Permissions Scheduling

Table Instances
 --- answers

Fixed Filters (always applied and cannot be changed at run-time)

Name	Expression 1	Operator	f(x)	Expression 2	▽ /
date	answers.c\$published	between	<input type="checkbox"/>	- 1 Weeks ↑ to - 0 Mont...	

Properties Filters **Output** Permissions Scheduling

Output Levels

- Levels
 - New Level
 - Output**
 - Result Grouping
 - Result Ordering
 - Comparison Options
 - Trends
 - Display
 - Data E
 - Format
 - Charts

Output Columns

Column/Function	Column...	Data ...	Column Heading	▽ /
answers.a_id	<input type="checkbox"/> Auto	N/A		▼
answers.summary	<input type="checkbox"/> Auto	All		▼▲
answers.c\$published	<input type="checkbox"/> Auto	N/A		▼▲
answers.status_id	<input type="checkbox"/> Auto	All		▼▲
answers.access_id	<input type="checkbox"/> Auto	All		▲

Answers Published Last Week

Answer ID	Summary	Date Published	Status	Access Level
67	Caller ID Product Guide	08/07/2006 12:00 AM	Review	Everyone
68	Caller ID Interactive Tutorial	08/10/2006 12:00 AM	Public	Everyone
69	Call Waiting Interactive Tutorial	08/06/2006 12:00 AM	Public	Everyone
70	About Inside Wire Maintenance	08/11/2006 12:00 AM	Public	Everyone



Related Sessions

- Advanced Knowledge Base Concepts:
Optimizing the Self-Service Experience

Tuesday 1:45 – 3:00

- Fine-Tuning Your RightNow Knowledge Base

Tuesday 3:30 – 4:45

- Advanced Knowledge Base Administration:
Driving Continuous Performance

Wednesday 10:30 – 11:45



Additional Resources

- <http://rightnow.custhelp.com>
- RightNow 7.0 Administration manual
- Education Services:
<http://rightnow.com/training>
- Ask the Experts
- RightNow 8 demonstration stations

