spaces
by Moxie™

Knowledge Spaces™ 9.4 Administrator User Guide

Knowledge Spaces™

Administrator User's Guide

9.4

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Chapter 1: Getting Started

This chapter introduces you to working in Knowledge Spaces™ Admin Control Panel.

In this chapter

About Knowledge Spaces™ Admin Control Panel

The Admin control panel enables users to manage KB Portals, Knowledge Bases, Articles, and other features of Spaces by Moxie™ Knowledge Spaces™ - also referred to in this document as Knowledge Spaces™.

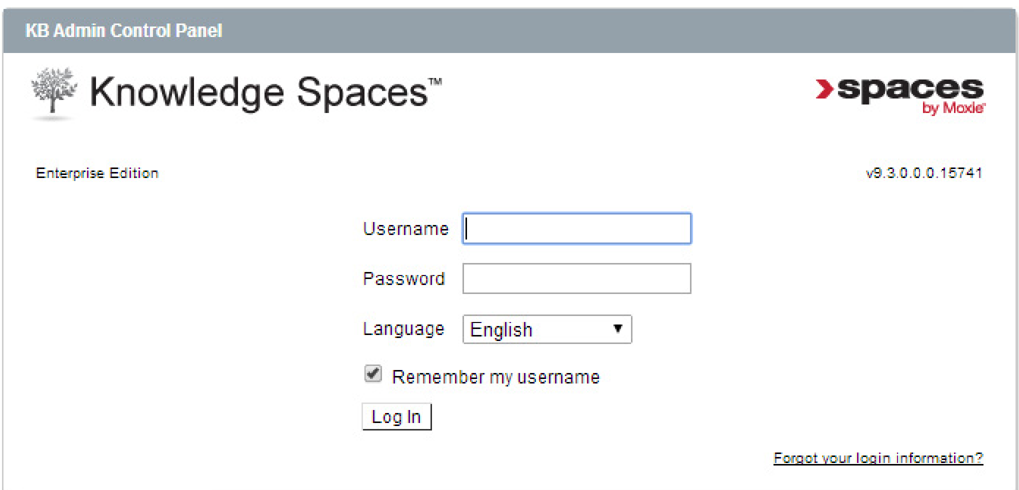
This section covers the prerequisites, and procedures pertaining to the usage of these components of Knowledge Spaces™.

Information in this section enables users of the Admin Control Panel to determine the best course of action for deploying Knowledge Spaces™. Logging onto Knowledge Spaces™ Admin Control Panel

You can log onto Knowledge Spaces™ from the Login page using the login credentials. If you do not have Login credentials contact Knowledge Spaces™ Admin Control Panel Administrator. The Login page restricts any unauthorized user accessing the application.

To Log onto Knowledge Spaces™ Admin Control Panel, carry out the following steps:

1. Enter the URL of the Knowledge Spaces™ Admin Control Panel in the address bar of the Web browser. The Login page is displayed.



2. Enter the user name and password in Username and Password fields respectively.
3. Select your preferred language from the Language dropdown box.
4. Click **Login**. The Home page is displayed.

Forgot Password

If you forgot your password, You can retrieve it password using click the ***Forgot your login information?*** link available on the Login page.The Request Password Reset page is displayed.

5. Enter the User Name and click **Submit**. A link will be sent to your email ID registered for the User Name.
6. Click the link to change the password.

Knowledge Spaces Admin Control Panel Home Page

The Knowledge Spaces Admin Control Home page is the starting point when you log on to Knowledge Spaces™ as an author, editor, or administrative Internal User.

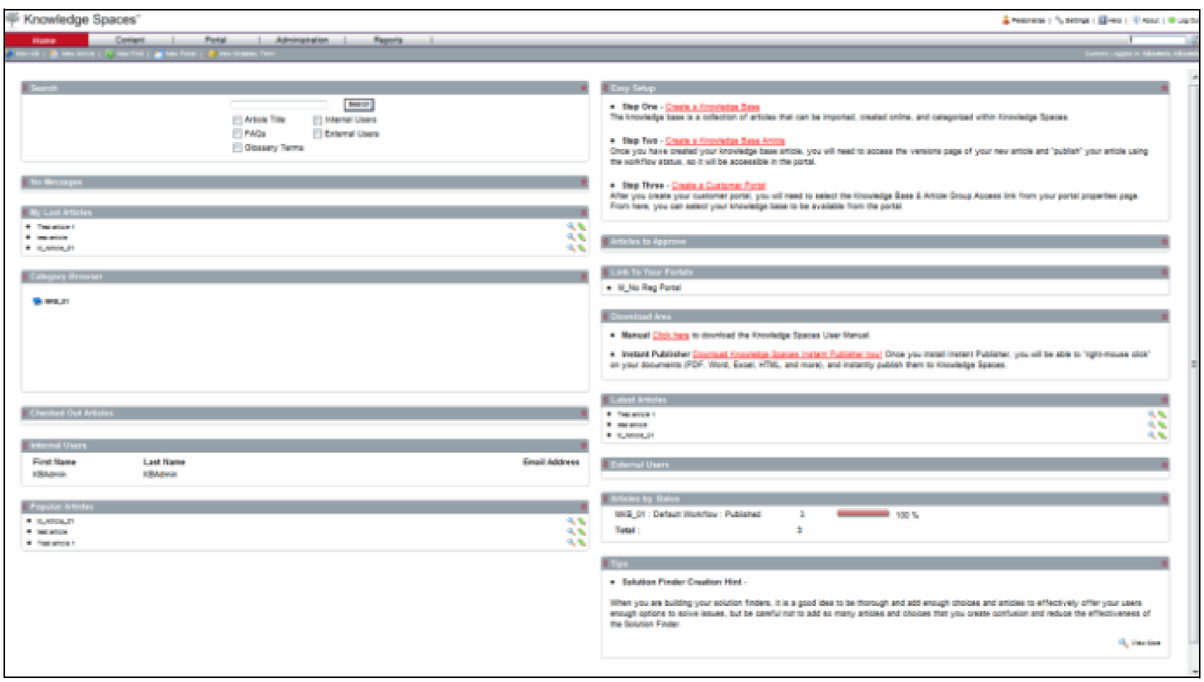


Figure 1 Knowledge Spaces Admin Control Panel Home Page

After you log on to Knowledge Spaces™ Admin Control Panel, the Home page is displayed. Modules on this page provide you with a dashboard view of your system, including usage, events, and items that require action.

Modules on this page, like all other sections of the software, are controlled through User Permissions. The Knowledge Spaces Administrator can designate which modules are available to you, and thereby control the availability of system features, and information.

Whether you have the permission to view only one, or several modules, you always have the ability to organize modules to your preference. The Home tab contains a link called **Personalize**. When you click on this link, a list of all the available modules is displayed. The modules, and their layout should reflect your usage of the software.

Here is a description of each Home tab module available:

Search Module

Enables you to quickly search for Articles, FAQs, Glossary Terms, Internal Users, and External Users. The default search is set to Article Title.

> **Note:**
>
> You can Search for Articles in the Workflow steps and Knowledge Bases for which you have the View permission.

Latest Articles

Displays the 10 most recent newly created Articles within the Knowledge Bases for which you have User Group access. From the list of Articles displayed, you can view and edit only the Articles for which you have the View, and Edit permissions.

Custom Message

Displays the custom message created by your Administrator. This HTML, or text-based message can be edited from any Internal User permission page.

> **Note:**
>
> Moxie Software™ does not provide support or assistance with CSS or JavaScript in Portal customization areas, widgets, or HTML Article Templates. Inclusion of any custom CSS or JavaScript code and maintenance or troubleshooting of custom code becomes the sole responsibility of the customer.

KB Tips

Generates a rotating list of tips and hints on using the Knowledge Spaces application. Each time you reload the Home tab, a tip is displayed in this module.

Easy Setup Instructions

Displays the processes with links for creating a Knowledge Base, creating a Knowledge Base Article and creating a Customer Portal. These three steps can also be accessed from the Quick Link menu bar from any tab in the Knowledge Spaces application.

Download Area

Displays link to download the Spaces by Moxie™ Knowledge Spaces™ 9.4 Administrator User Guide.

Internal Users

Displays the most recently created Internal Users names and email addresses, as well as a link to **View All** Internal Users. You can click on either their name, or Email address to view their permissions set.

Most Popular Articles

Displays the Articles most frequently accessed by external users.

My Last Articles

Displays the 10 Articles you last accessed in Knowledge Spaces™ Admin Control Panel.

Articles to Approve

Displays the Articles not in the **Live**, or **Expired** step of a Workflow, but only in the Workflow steps or Knowledge Bases you have permission to access. This is a good reminder of what Articles need to be approved.

Category Browsing

Displays all the Knowledge Bases for which you have permission. Clicking a **KB** link expands listing all top-level Categories. Clicking a **Category** expands its view to its Sub-Categories and/or any Articles. At the Article Level in this module, you can click on the icon to view the Article or the icon to edit the Article properties. You can view and edit only the Articles for which you have view and edit permission.

Link to Portals

Provides links to all Portals. Clicking a **Portal** link opens a new browser window and loads the desired Portal.

External Users

Displays a list of the most recently created External Users or end-users with secure passwords. External User names, and Email addresses are links to view their external permissions. You also have an option to **View All** External Users.

Icons Used in Knowledge Spaces Admin Control Panel

The following table lists the icons used in Knowledge Spaces™ Admin Control Panel:

Icon	Description
	**Knowledge Base**
	**Back**
	**Category/Categorize**
	**Change Status**
	**Copy**
	**Delete**
	**Menu Delete**
	**Create a New Glossary term**
	**Edit**
	**Expand a category or article**
	**Group**
	**Settings**
	**E-mail Subscribe**
	**Menu - New folder**
	**Help**
	**Create a New Article**
	**New KB**
	**Import KB**
	**Note**
	**Personalize**

Icon	Description
	**Add Article**
	**Add Choice**
	**Article Checked Out**
	**New FAQ**
	**New Workflow**
	**New Workflow Step**
	**New Template**
	**Article Template Transfer**
	**New User**
	**Apply User Profile**
	**New User Profile**
	**Clone Profile**
	**New User Group**
	**Refresh**

Personalizing the Home Page

You can personalize the home page with a number of tools and features that makes finding articles, users, news, portals, and other information easy and accessible.

The personalization features that can be added on the home page are:

- Custom News Updates or Broadcast Message
- Search Functionality
- Knowledge Base Category Browsing
- Articles You Have Checked Out for Editing
- Article Pending Your Approval in the Workflow
- Most Popular Articles
- Most Recent Articles That You Have Accessed

- Most Recently Created Articles
- List of Articles by Workflow Status
- List of Internal Users
- List of External Users
- Link to the Knowledge Base Portals
- Knowledge Spaces™ Tips
- Download Center
- Easy Setup Instructions

Every Internal User can decide which personalization features must be displayed on the User's home page.

To Personalize your Home Page

1. In the upper right corner of the Home page, click **Personalize** .
   The tools and features that you can add to the Home page are displayed.

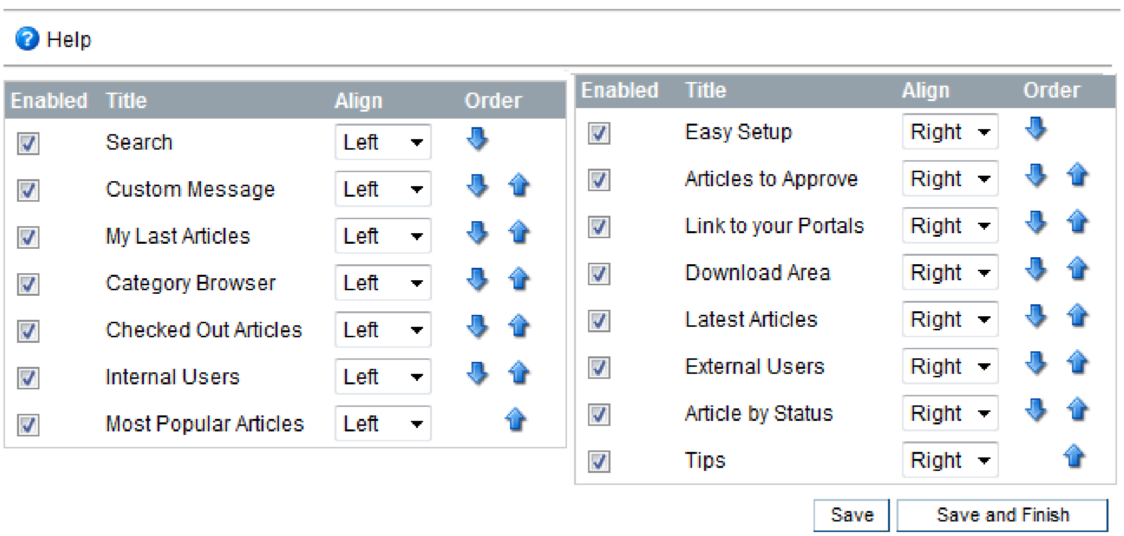


Figure 2 Page Showing the Personalization Features

2. Select the check box next to each feature you want to add to your Home page.
3. To choose which side of the home page to place each feature, click the arrow in the Align column, and select **Left**, or **Right**.
4. Click , or next to the features, depending on the vertical order in which you want to display the features.
5. Click **Save**, or **Save and Finish**. Your Home page settings are saved.

   The Administrator can customize the personalization options at the User level. In the Internal Users area of the Administration tab, the personalization options available to individual Users can be added or removed from the display. With these controls, you can determine exactly which features must be available to each User, when the User logs on.

Chapter 2:Content Management

This chapter provides detailed information about Managing Content in Knowledge Spaces™ Admin Control Panel.

In this chapter

Knowledge Bases

This section introduces you to knowledge bases in Knowledge Spaces™ Admin Control Panel.
The Content tab in Knowledge Spaces™ Admin Control Panel provides the window to all the management tools you need to create, and manage individual Knowledge Bases and the Knowledge Base content.

The Knowledge Base is the highest level in Knowledge Spaces™ content taxonomy, and is a collection of information, comprising:

- Articles
- Files
- Categories
- Links
- Images
- Resources

Generally, information in a Knowledge Base is related, and organized in a file structure within the Knowledge Base.

Creating a Knowledge Base

You can create a Knowledge Base from the Content tab of Knowledge Spaces™ Admin Control Panel. In the Content tab, click **View** in the Knowledge Base section. A list of Knowledge Bases is displayed. Use the  icon or the **New KB** link on the Knowledge Base page to create a Knowledge Base.

Note:

You must be granted the **Create New Knowledge Base** permission to create a new Knowledge Base.

To Create a New Knowledge Base

1. On the **Knowledge Base** page, click or **New KB**.
   The **New Knowledge Base** page is displayed.

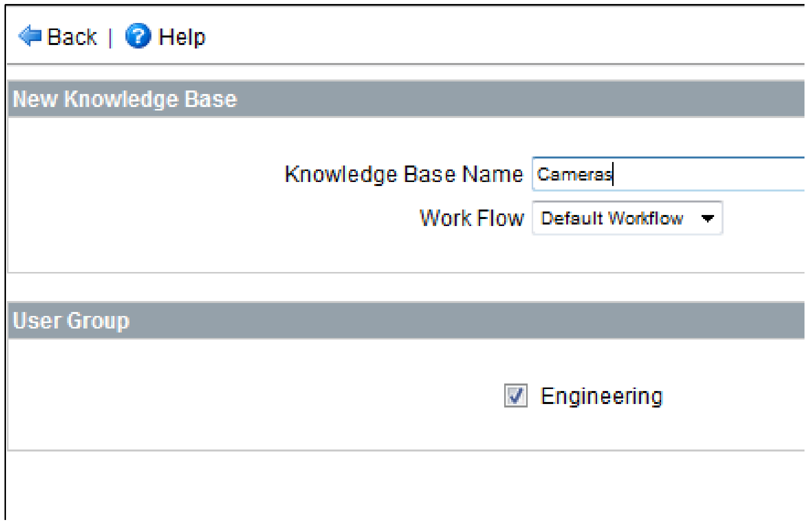


Figure 3 Creating A New Knowledge Base

2. In the **Knowledge Base Name** field, type a name for the Knowledge Base.
3. From the **Work Flow** list, select a Workflow process. A Workflow process provides the series of steps for an article to move through, before it is live in the Knowledge Base.

> **Note:**
>
> Knowledge Spaces™ installs a **Default Workflow**. You must create a new Workflow process before creating a Knowledge Base, if you want your Knowledge Base to use a Workflow other than the Default Workflow. For more information, **see "About Workflow Editor" on page 392.**

4. If you have created more than one User Group, by default, all the are selected in the **User Group** list. You must clear the selection of the for which you do not want to provide access to the Knowledge Base.

   The newly created Knowledge Base is listed along with the existing Knowledge Bases on the Knowledge Base page. This page lists the Knowledge Bases in an alphabetical order. The column to the right in the Knowledge Base page shows the Workflow process each Knowledge Base is using.

Importing a Knowledge Base

The **Import KB** function on the Knowledge Base page enables you to import an existing Knowledge Base from a remote location into Knowledge Spaces™ Admin Control Panel. The import function requires existing Windows.chm (HTML Help) files, and imports them in a format recognized by Knowledge Spaces™, thereby creating a functional Knowledge Base on import.

> **Note**
>
> You must be granted the **Import Knowledge Base** permission to import a Knowledge Base.

To Import a Knowledge Base

1. On the **Content** page, click **View** in the Knowledge Base section.
   A list of Knowledge Bases in Knowledge Spaces™ is displayed.
2. On the **Knowledge Base** page, click or the **Import KB** link.
   The **Import Knowledge Base** page is displayed.

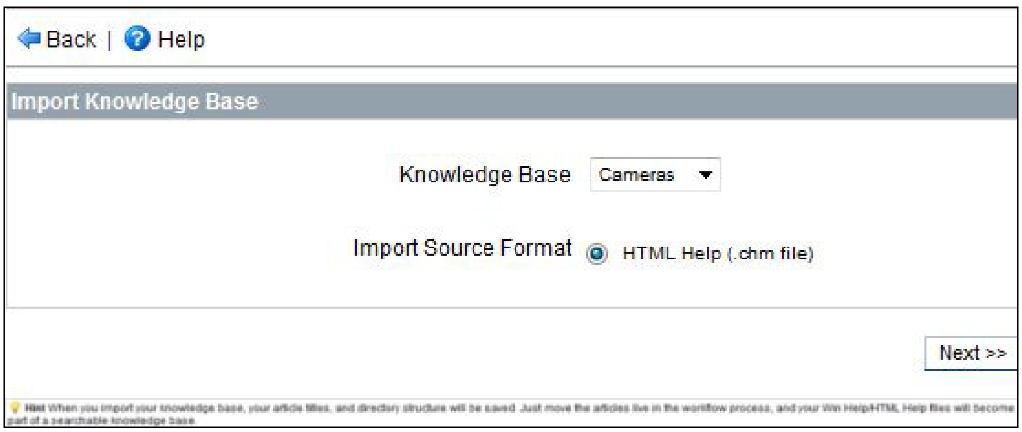


Figure 4 Import Knowledge Base Page

3. From the **Knowledge Base** list, select a Knowledge Base to which you want to import the help file. By default, the source format is HTML Help (.chm file).

4. Click **Next**. The page for selection of the file to upload is displayed.

Figure 5 File Upload Page

5. Click **Browse** to locate the.chm file that you want to upload. The **Choose File** dialog box is displayed.
6. Select the file to upload, and click **Open**.
7. Click **Next**. The file is uploaded.

   After the upload is complete, you must wait for some time before you can view the new files in the Knowledge Base into which the help file is uploaded. This time is necessary for the Knowledge Base application to convert the files into the format used by Knowledge Spaces™.

> **Note:**
>
> - The maximum file size for a.chm file that you can upload is 3.5 MB (ASP version only).
> - The help file uploaded into a selected Knowledge Base will be listed as articles in the Knowledge Base.

Sorting Knowledge Base Columns

After you create or import a Knowledge Base, it is listed on the Knowledge Base page. Knowledge Bases are listed in alphabetical order.

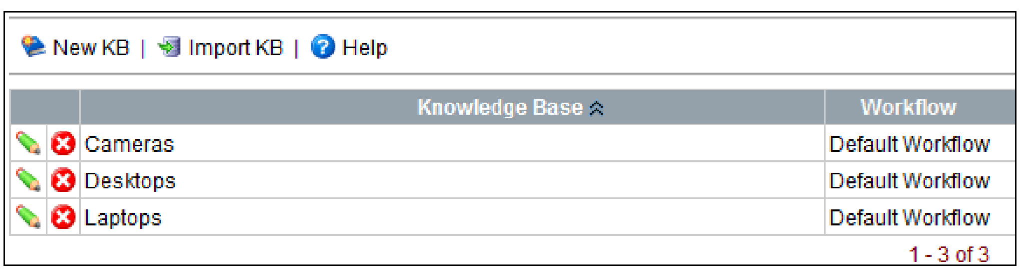


Figure 6 List of Knowledge Bases on the Knowledge Base Page

To Sort Knowledge Base Column Headings

- On the **Knowledge Base** page, click the **Knowledge Base** column heading.

  The list of Knowledge Bases is sorted in the alphabetical order.

  The order of the Knowledge Bases is sorted based on the alphabetical order of the Knowledge Base names.

To Sort by Workflow

- On the **Knowledge Base** page, click the **Workflow** column heading.

  The order of the Knowledge Bases is sorted based on the alphabetical order of the Workflow names.

Editing a Knowledge Base

You can edit the name of an existing Knowledge Base, or change the Workflow editor that the Knowledge Base is currently using for the article publishing process.

> **Note:**
>
> You must be granted the **Edit Knowledge Base** permission to edit a Knowledge Base

To Edit a Knowledge Base

1. On the **Knowledge Base** page, click to the left of the Knowledge Base name.

   The **Edit Knowledge Base** page is displayed.

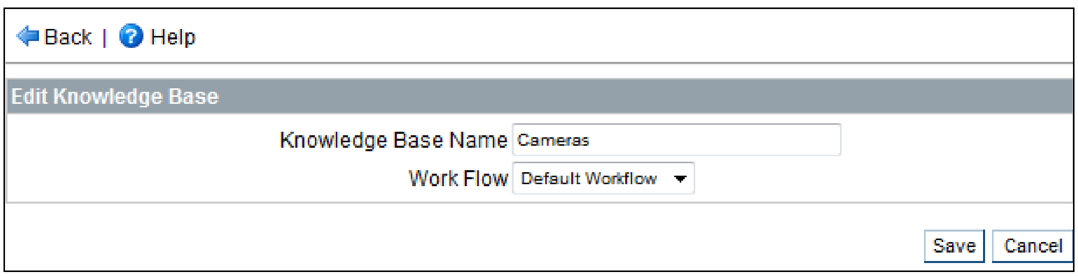


Figure 7 Edit Knowledge Base Page

You can edit the name of the Knowledge Base, and change the Workflow process.

> **Note:**
>
> If you change the Workflow process with which the Knowledge Base is associated, all articles that are not in the **New**, **Published**, or **Expired** Workflow steps move to the new Workflow step in the new Workflow process. Articles previously in the **New**, **Published**, or **Expired** Workflow steps remain in these steps in the new Workflow process. For more information, **see “About Workflow Editor” on page 392**.

2. Click **Save**. The changes made to the selected Knowledge Base are updated.

Deleting a Knowledge Base

You can delete a Knowledge Base only if you have the **Delete Knowledge Base** Permission. Deleting a Knowledge Base automatically deletes all the Articles, FAQs, and Categories that reside in the Knowledge Base.

Note:

- The deletion of a Knowledge Base cannot be undone.
- The permission to delete Knowledge Bases must be granted to Users, with discretion.

To Delete a Knowledge Base

1. On the **Knowledge Base** page, click to the left of the Knowledge Base name.

   The confirmation message box to delete the Knowledge Base is displayed.

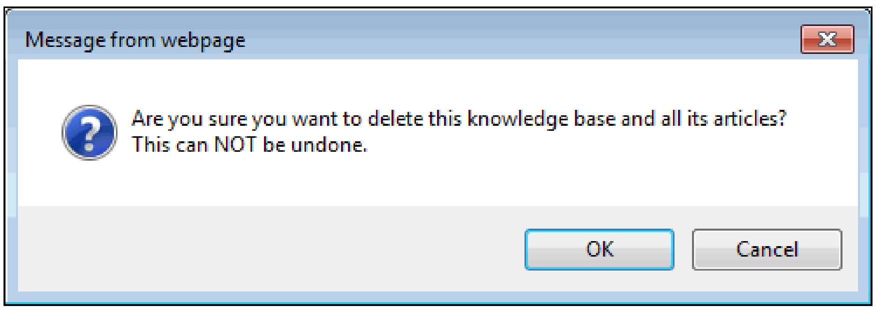


Figure 8 Confirmation Message Box to Delete the Knowledge Base

2. Click **OK**. The **Edit Knowledge Base Confirmation** page is displayed.
3. Specify you KB Administrator password, and click **Finished**.

   The selected Knowledge Base is deleted.

Caution:

If you delete a Knowledge Base, you also delete all the Articles, and Categories that reside in the Knowledge Base.

Articles

The Content tab provides the necessary tools for the creation, management, and organization of Articles. An Article can be either created online using a template or an uploaded file. An Article can be a data sheet, a list of instructions, a policy manual, a help file, and so on. Article content is generally text, and images. The Articles can also have attachments such as images and sound files, as well as references to related links or related Articles. From a Knowledge Spaces hierarchy perspective, Articles are at the lowest level

Batch Update

Changing article properties such as titles, categories, attributes, article groups, keywords, and more, can now be done by the batch update process. Users can download a control file containing all article properties for one or more knowledge bases, edit the file, upload it and schedule a date and time for the changes to occur.

Article properties that can be added or modified by batch update include the following:

- Attributes
- Article Groups
- Attachments
- Categories
- Exact Match Keywords
- Priority Keywords
- FAQs
- Related Articles
- Related Links

Admin Setting for this Feature

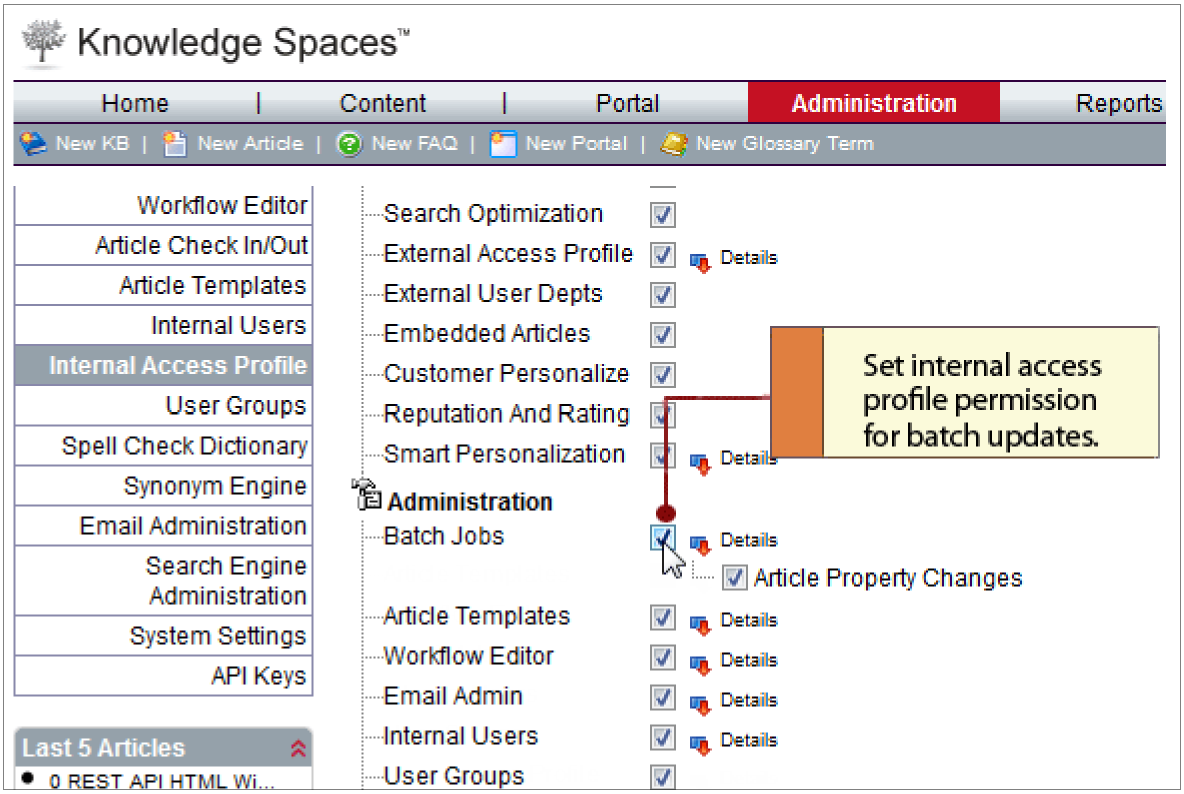


Figure 9 Admin Setting - Internal Access Profile Permission

This feature is supported by a new permission in the internal access profile to restrict use of this feature by only authorized users.

Database Rollback

Selecting "Create Article Properties snapshot prior to job execution" creates a backup file in "\Knowledgebase.Net\logs\ScheduledTasks\BatchJobs\clientId\ArticleProperties\Backup" with the file name “jobId_date”.

The backup file includes logging and audit history to help track the schedules and the batch jobs. This file can be used to return the knowledgebase to the state it was in prior to a batch update.

> **Note**
>
> The backup file will be automatically deleted after 7 days.

Creating New Batch Jobs

To create a new batch job, carry out the following steps:

1. Click **Batch Jobs,** then click **New Job.**
2. Enter job name in the **Job Name** text box.
3. Select date, month and year from the **Run Date** drop-down menu.
4. Select time from the **Run Time** drop-down menu.
5. Click **Browse,** then select the appropriate **Control File** from the destination folder.
6. Click **Finished** to create a new **Batch Job**.

Updating Batch Jobs

For *batch update*, carry out the following steps:

1. Select one or more knowledge base and download its properties to a CSV (comma separated values) file.
2. Open the CSV file in a spreadsheet editor like Microsoft Excel™.
3. Update article properties and upload the revised data from the spreadsheet file.
4. Schedule a run time update.

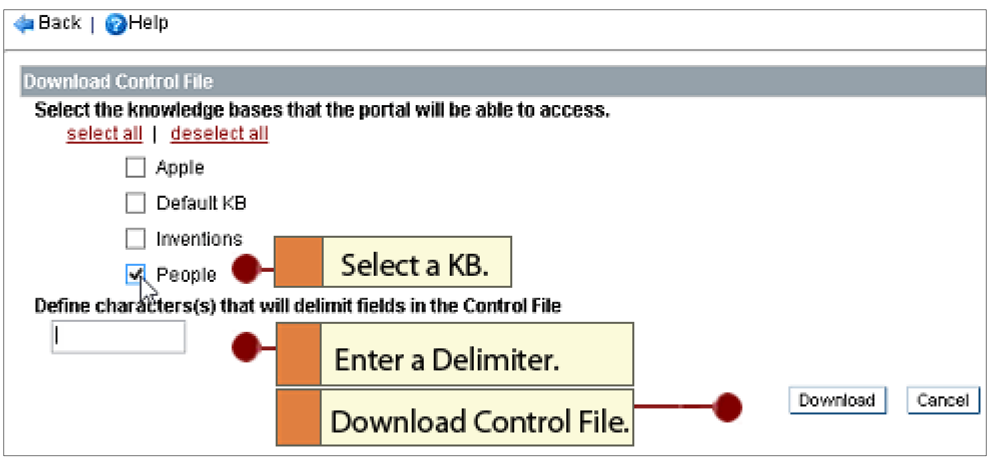


Figure 10 Select KB, Download for Batch Update

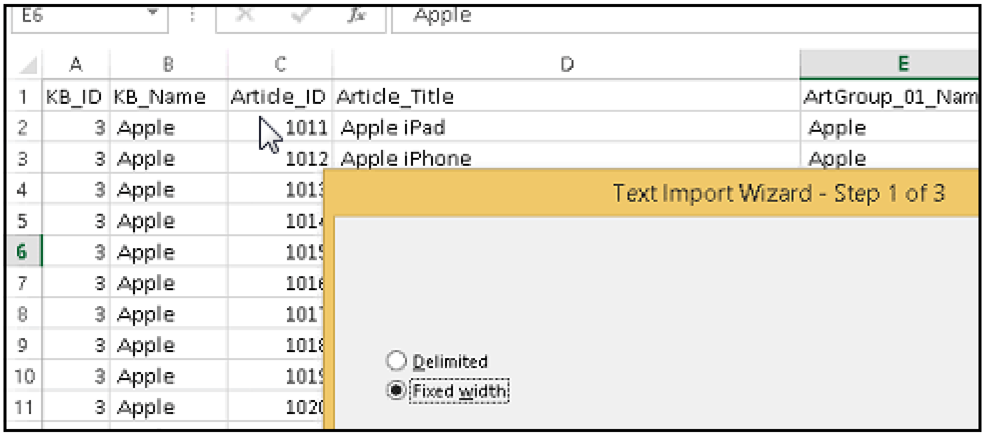


Figure 11 Comma separated list - input for a Spreadsheet Tool like Microsoft Excel™

Batch-Job - Example

For a ***batch update***:

- Select one or more knowledge base(s) and download its properties to a CSV (comma separated values) file. This is termed the control file.
- Open the control file in any application that supports CSV file format. For example a spreadsheet editor like Microsoft Excel™.
- Make changes and upload the revised data from the file.
- Schedule a run time update.

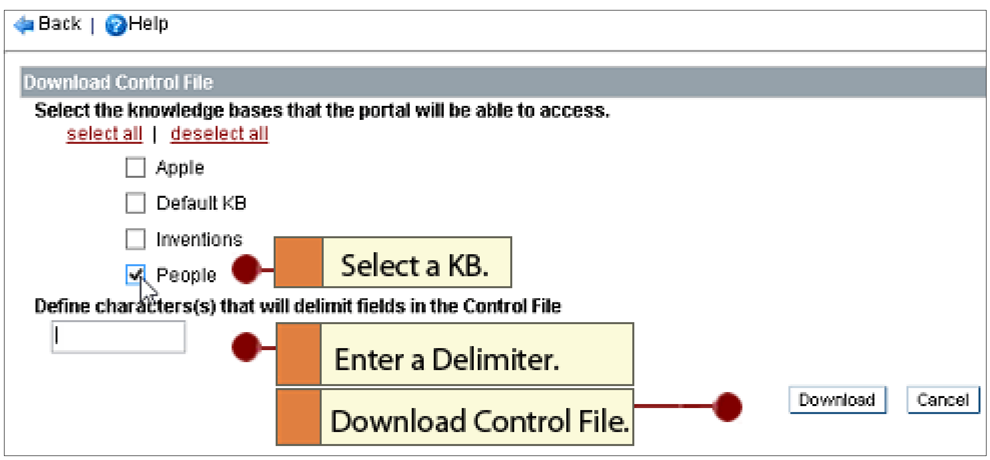


Figure 12 Select KB, Specify Field Delimiter for Control File

> **Note:**
> The control file downloaded as described in this section, should not be opened by double-clicking the file name in the folder-view. The correct way to access this file is as follows:
>
> - If you use Microsoft Excel™, open a new file.
> - Use the option sequence
>   Data > From Text File > browse for and click the downloaded file.
> - Specify the delimiter
> - Click Finish.

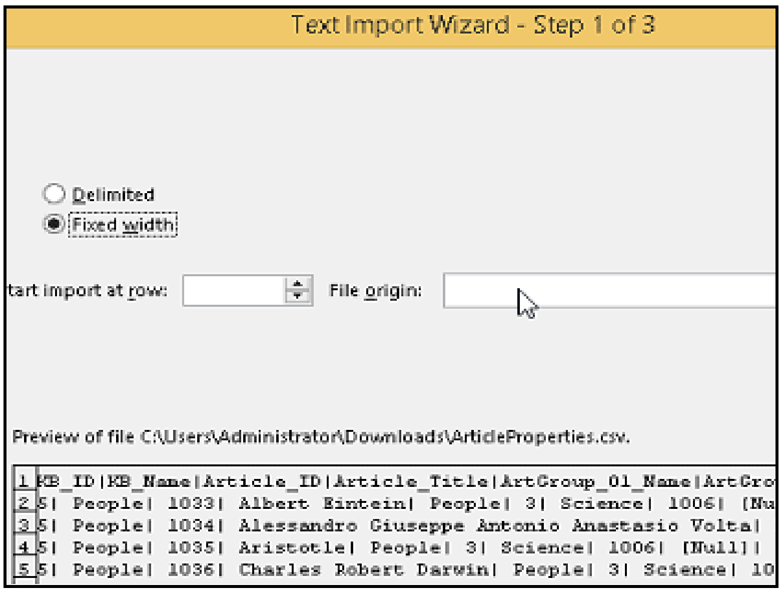
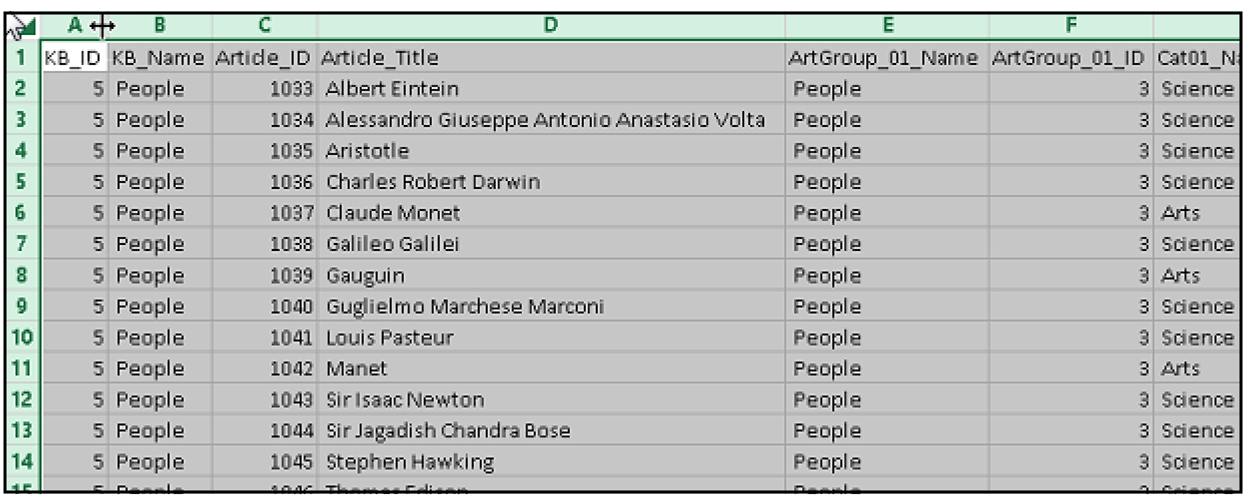


Figure 13 Control File (CSV) for Upload into an Application that supports CSV files



	A	B	C	D	E	F	
1	KB_ID	KB_Name	Article_ID	Article_Title	ArtGroup_01_Name	ArtGroup_01_ID	Cat01_N
2	5	People	1033	Albert Eintein	People	3	Science
3	5	People	1034	Alessandro Giuseppe Antonio Anastasio Volta	People	3	Science
4	5	People	1035	Aristotle	People	3	Science
5	5	People	1036	Charles Robert Darwin	People	3	Science
6	5	People	1037	Claude Monet	People	3	Arts
7	5	People	1038	Galileo Galilei	People	3	Science
8	5	People	1039	Gauguin	People	3	Arts
9	5	People	1040	Guglielmo Marchese Marconi	People	3	Science
10	5	People	1041	Louis Pasteur	People	3	Science
11	5	People	1042	Manet	People	3	Arts
12	5	People	1043	Sir Isaac Newton	People	3	Science
13	5	People	1044	Sir Jagadish Chandra Bose	People	3	Science
14	5	People	1045	Stephen Hawking	People	3	Science

Figure 14 Control File in a Spreadsheet Format Ready for Editing

Columns in the Control File represent article properties

Control File Table

Table 1 illustrates the following characteristics of the columns in a typical *control file*.

- Column names.
- Each column's purpose.
- Whether the column can be updated by the batch process.
- Whether the column is mandatory in order for the Batch Job process to complete.

Column Name	Purpose	Can be updated? Y/ N	Type
KB_ID	Context	No	n/a
KB_Name	Context	No	n/a
Article_ID	Context	No	n/a
Article_Title	Update	Yes	Alpha-Num
ArtGroup_nn_Name	Context	No	n/a
ArtGroup_nn_ID	Update	Yes	Numeric
Catnn_Name+Parent+GrParent	Context	No	n/a
Catnn_ID	Update	Yes	Numeric
Attrnn_Name+Parent+GrParent	Context	No	n/a
Attrnn_ID	Update	Yes	Numeric
Priority_Keywords	Update	Yes	Alpha-Num
Exact_Keyword_nn	Update	Yes	Alpha-Num
Reference_Word	Update	Yes	Alpha-Num
Manual_Summary	Update	Yes	Alpha-Num
Related_Article_nn_Title	Context	No	n/a
Related_Article_ nn _ID	Update	Yes	Numeric
Locale_ID	Context	No	n/a
Attachment_ nn _Name	Context	No	n/a
Attachment_ nn _ID	Update	Yes	Numeric
Subscription_Enabled	Update	No	n/a
Is_Base_Article	Context	No	n/a
Base_Article_ID	Context	No	n/a
FAQ_ nn	Update	Yes	Alpha-Num

Column Name	Purpose	Can be updated? Y/ N	Type
ArtCreated_Date	Context	No	n/a
ArtCreated_By	Context	No	n/a
Published_Version	Context	No	n/a
Published_Workflow	Context	No	n/a
Published_Date	Context	No	n/a
Published_By	Context	No	n/a
Latest_Version	Context	No	n/a
Latest_Version_WF	Context	No	n/a
Latest_Version_WFS	Context	No	n/a
Latest_Version_Date	Context	No	n/a
Latest_Version_Created_By	Context	No	n/a
Expiration_Date	Context	No	n/a
Template_Name	Context	No	n/a
Inherent_Format	Context	No	n/a
Converted_HTML	Context	No	n/a

Table 1 Control file Table and Column Properties

The column headings should be understood as follows:

- Column Name - Column names in the table that show text formatted as ***nn*** represent a type of *Article Property* for which multiple values may be defined for each Article. The ***nn*** is a placeholder for documentation purposes, and represents a numeric identifier that increments when more than one value of a property type exists for an article.
- Context - Fields whose purpose is marked as ***Context*** provide users key insights about an Article in order to help in the selection of Articles to be updated, but cannot be updated via the batch update process. For example, understanding which Knowledge Base an Article resides within, or the Article Template that it uses can help guide in the selection of Articles to apply a specific update to.
- Can be Updated? - ***Yes*** indicates that the Fields can be updated via batch process. ***No*** indicates that they cannot be updated.
- Type - The type of value that is valid for use by the update process.

  Fields with an *Alpha-Num* type can be updated with strings that contain any valid ASCII character.

  Fields with a *Numeric* type, may only be updated with valid values from the Knowledge Spaces application. For example, to add an Article to a Category, a valid Category ID number from the corresponding Knowledge Base is required. The Category ID value can be viewed by hovering over any Category Name in *Admin Control Panel > Category Management.* See red highlight in Figure 15.

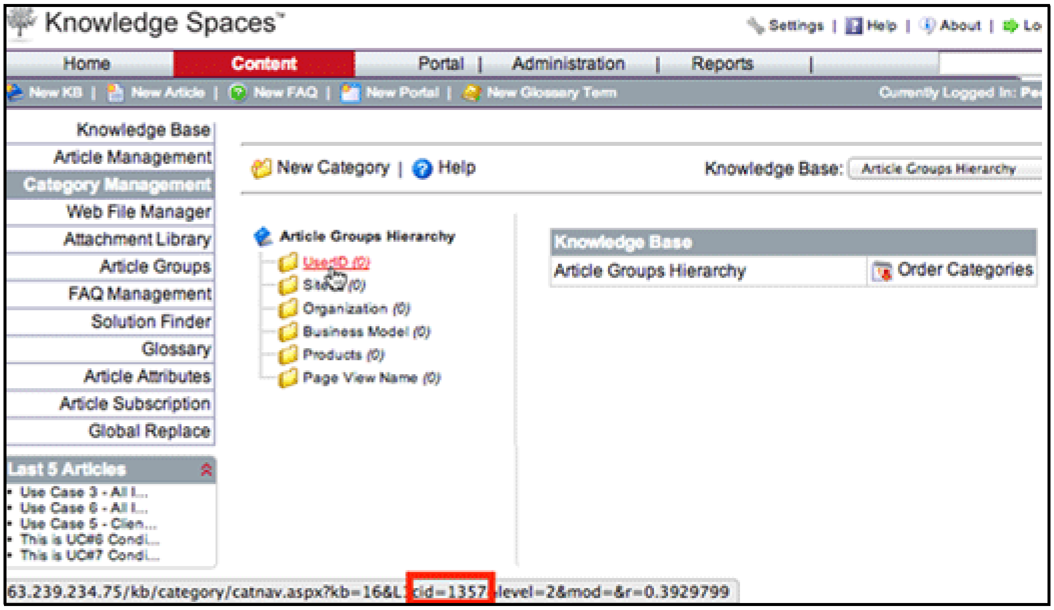


Figure 15 A Category Name's Category ID Value

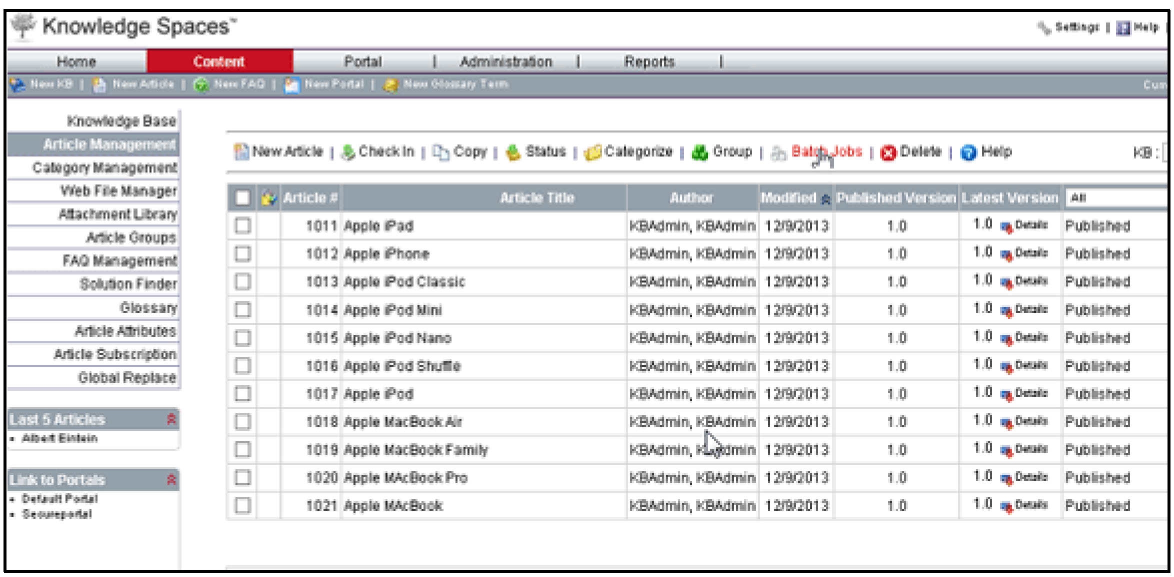


Figure 16 Select Option *Content* > *Batch Update*

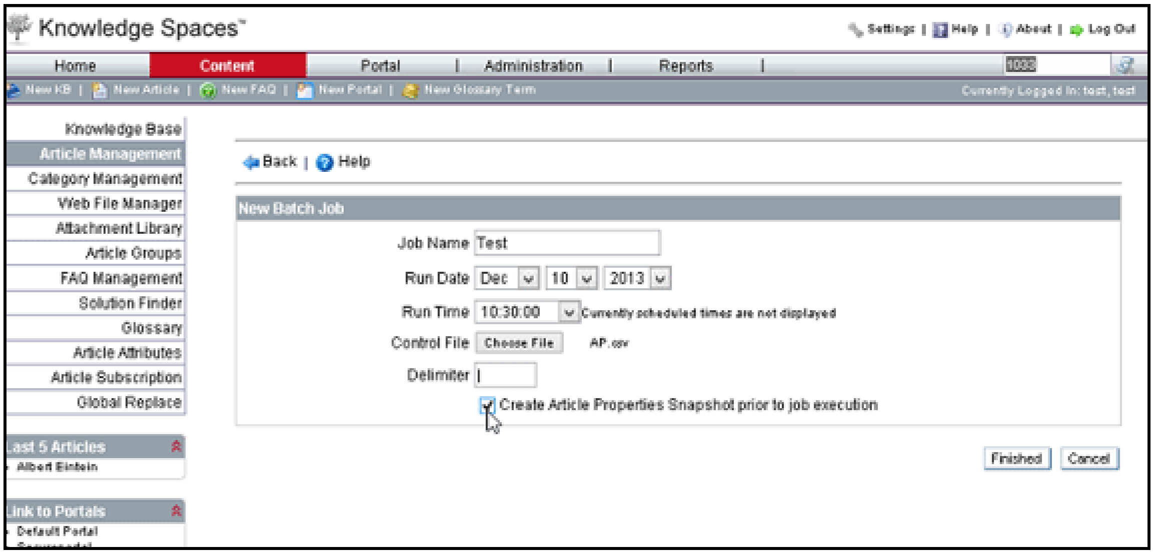


Figure 17 Set a Schedule for Batch Update and Set the Option for Creating the "Snapshot"

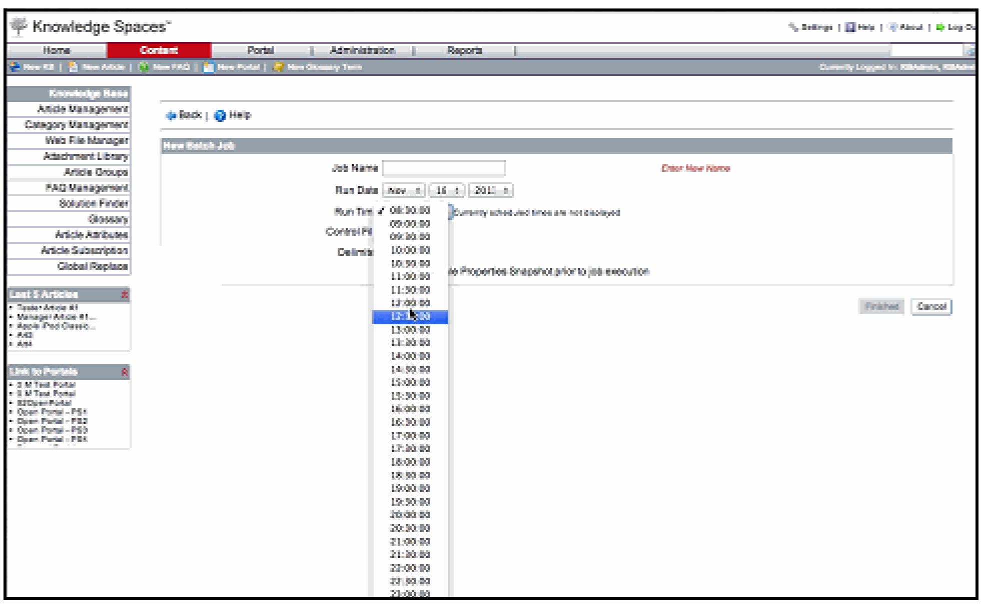


Figure 18 Set Time for the Batch Job

Listing the Articles in a Knowledge Base

After an Article is created or imported, it is listed by date (most recently created or edited) on the Article Management page. At the top right of the Article Management page is the KB list. When you select a Knowledge Base from the KB list, the Articles contained in the selected Knowledge Base are listed on the Article Management page.

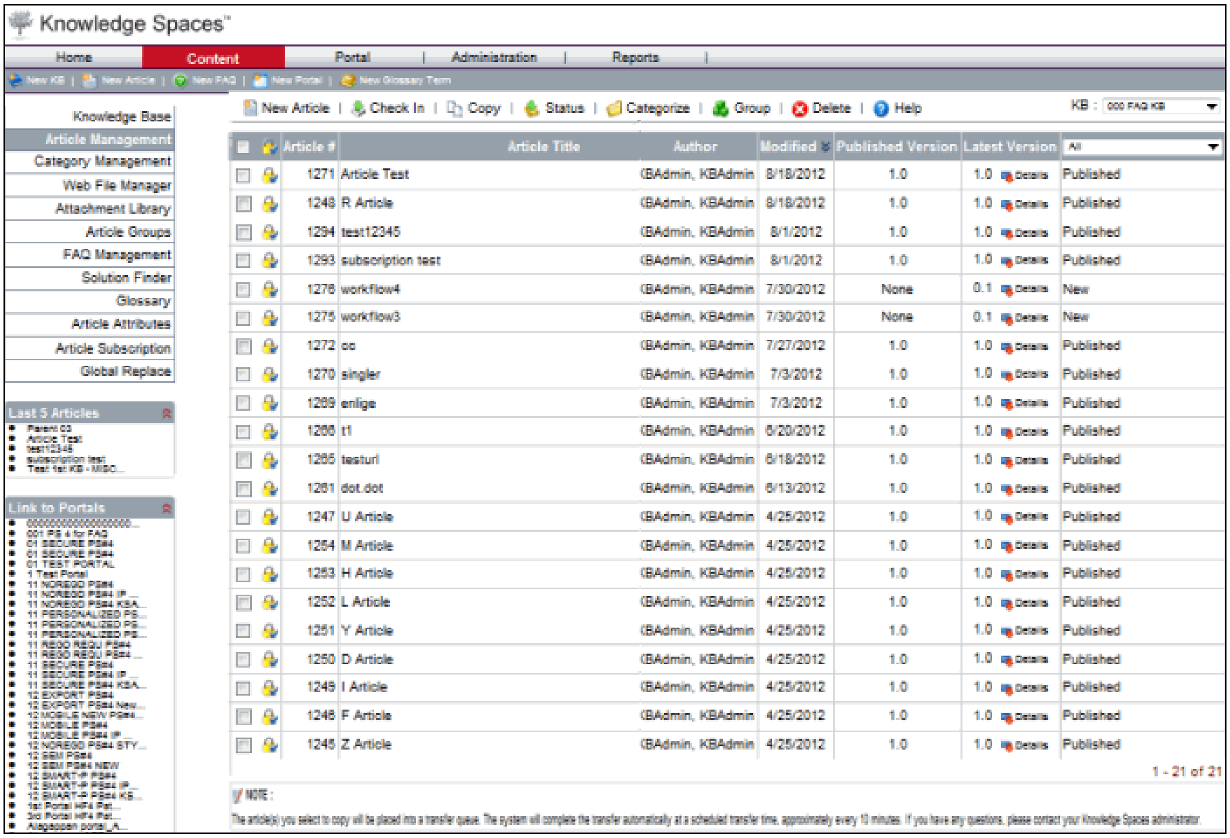


Figure 19 Article Management Page Showing the List of Articles in a Knowledge Base

On the Article Management main page, you can do the following operations:

- Create Articles
- Check in the Articles
- Copy Articles
- Change Workflow status
- Categorize Articles
- Group Articles
- Delete Articles
- Sort Articles

Creating an Article

You can create an Article in the following two ways:

- Create an Article using the Article Editor
- Import a file

> **Note:**
>
> You must be granted the Create New Article permission to create new Articles.

To Create a New Article Using the Article Editor

1. In the navigation bar, click New Article

   - OR -

   From the **Content** tab, click **View** in the Knowledge Base section. A list of Knowledge Bases is displayed. Select a Knowledge Base for the new Article, and click . New Article

   The **New Article** page is displayed.

   -OR-

   From the **Content** tab, click **Article Management.** The List of Articles for a Knowledge Base is displayed. Select a Knowledge Base from the KB dropdown box available on the upper right side. Click New Article The **New Article** page is displayed.

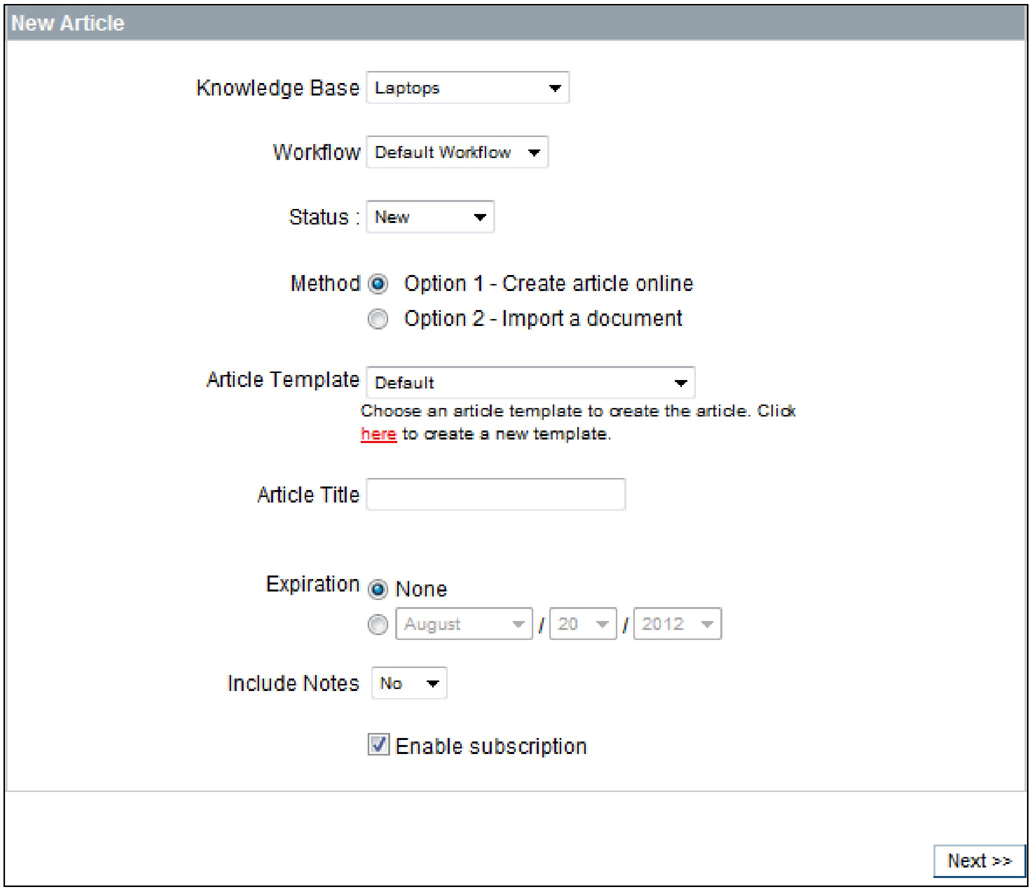


Figure 20 New Article Page

By default, Option 1 – Create article online is selected.

2. From the **Knowledge Base** list, select the Knowledge Base where you want the new Article to reside.
3. From the **Workflow** list, select the Workflow you want to assign to the Article. This list includes the Workflows that your Administrator has granted you access. The Workflow associated with a version enables the version to progress through a series of Workflow steps defined for the Workflow.
4. From the **Status** list, select the Workflow step where you want to place the Article. The statuses defined for the selected Workflow are included in this list. The list includes the steps that your Administrator has granted you access.
5. From the **Article Template** list, select the Article template you want to use for creating the Article. Article Templates are used to create a format for an Article. If you have not created any Article templates, you can use the default template provided.

   Article templates are created, and managed through the Article Templates section on the Administration tab. For more information, see **"About Article Templates" on page 404**.
6. In the **Article Title** field, enter a title for the Article.

7. In the **Article Title** field, enter a title for the Article

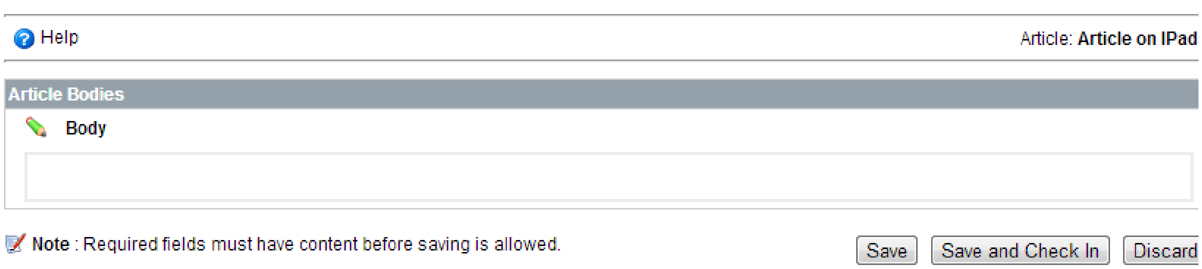
> **Notes:**
>
> It is recommended not to create Articles with the word “attachment” in the title of the Article. When a Portal User tries to view an Article that has the word attachment in the title, Internet Explorer 8 mis-interprets and attempts to download the Article instead of displaying it.
>
> While creating an Article, if you enter a space at the beginning of the Article, the Online Editor does not include the space in article content.

8. From the **Expiration** options, enter a date of expiration for the Article if you want to set the expiration date for an Article. By default, the Expiration is set to **None.**
9. From the **Include Notes** list, select **Yes** to include a note for the Article. If you do not want to add a note, proceed to Step 11.

   The **Subject** and **Notes** fields are displayed.
10. Enter the **Subject** of the **Note** in the **Subject** field.
11. Enter the Body of the **Note** in the **Notes** field.
12. Select the **Enable subscription** option if you want users to be able to subscribe to the Article.

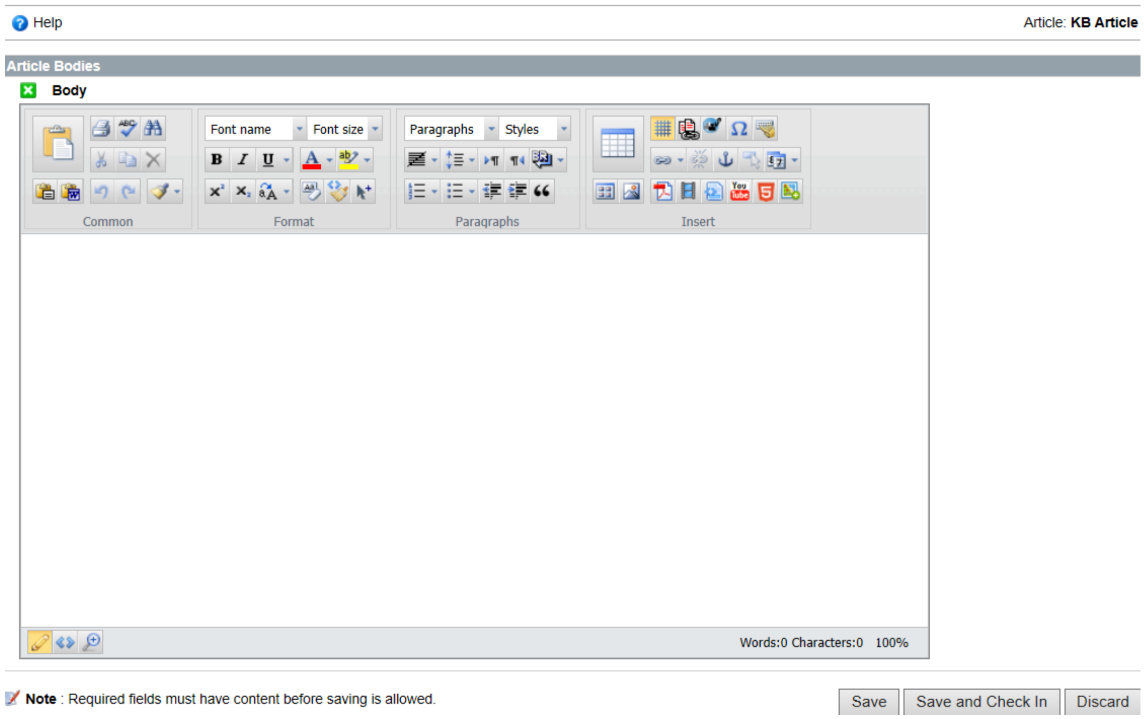
> **Note:**
>
> You can also select the **Enable subscription** option later, by editing the Article Properties.

13. Click **Next**. The **Article Editor** page is displayed. The Article Editor displays a field for each Article Body available in the selected Article Template.



14. Click  button to open the editor control for an Article body.

    The Article Editor is displayed.



> **Note:**
>
> You cannot delete or move images in the image gallery.

The Article Editor enables you to create, and edit rich content.

You can choose from two editor modes:

- Normal: functions similarly to Word processing applications. and contains toolbars with a number of formatting options and controls.
- HTML: displays markedup content of the active Article body. Care must be taken in this mode because changes to HTML can significantly alter the appearance of the content. Users who are familar with HTML choose this mode to enhance the default markup created by the editor’s formatting options.

15. Type, or paste the content in the field(s) provided. In the Normal mode, you can use the features available in the toolbar to format your Article.

- The number of Text Bodies, font, and other properties of the Article are determined by the Article template selected to create the Article. For more information, see **"About Article Templates" on page 404**.

> **Note:**
>
> Autosave
>
> Autosave feature saves the content of an Article automatically while creating or editing Article content using the Online Article Editor at the pre-configured time intervals. The Autosave feature prevents the loss of Article content that might occur from a browser or system crash, or loss of network connectivity. All the Autosaved articles are displayed on the Article Information page with the prefix Autosaved along with the Article Title with the appropriate Article status.
>
> When a User creates an Article in the Online Article Editor by selecting the Published Workflow step, the status of the Autosaved Article will be saved to New Workflow step on the Article Information page.
>
> Note:
>
> If the User has permission only to the Published Workflow step, the Article will not be Autosaved.

16. Click **Insert Image** to insert an image into the Article.

Note:

The default maximum size of an image folder from which you can upload an image into an Article is 100 MB. You can configure a different Image folder size by editing the <security name="MaxImageFolderSize">102400</security> tag in the Admin.config file located in the <Knowledge Spaces Installation Path> \KnowledgeBase.Net\Knowledge base\applicationprogram\ui\http\ClientPortal\CuteSoft_Client\CuteEditor\Configuration\Security\ path on the computer where Knowledge Spaces Client Portal is installed.

You can configure the "Insert Image" path in the Article Editor to Manager or Attachment Library.

To configure the "Insert Image" path to " Manager", carry out the following steps:

- Open the web.config file in the <System Drive>: \Program Files\Knowledgebase.Net\knowledgebase\applicationprogram\ui\http\ClientPortal\ path
- change the value of add key tag to "/pf/"

  <add key="InsertImagePath" value= "/pf/"/>

- To configure the "Insert Image" path to "Attachment Library", carry out the following steps:
  - Open the web.config file in the <System Drive>: \Program Files\Knowledgebase.Net\knowledgebase\applicationprogram\ui\http\ClientPortal\ path
  - change the value of add key tag to "/cd/"

    <add key="InsertImagePath" value= "/cd/"/>

17. Click **Insert Article Link** to create a hyperlink to another Article. To do so:

    i. Select the text for which you want to embed a link, and then click  . The **Insert Article Link** window is displayed.

Figure 21 Insert Article Link Window

ii. In the ArticleID field, enter the ID of the Article you want to link.
iii. If you want to link to anchored text within the Article, specify the anchor created within the Article to which you are linking. This step is optional.
iv. Click **Insert**.The Article Link is created.

18. Click **Insert Forum** link to create a hyperlink to a specific Knowledge Spaces Forum Thread.

Note: Forum links will appear regardless of whether the user's Portal contains the referenced Forum.

To create a link from an Article to a Forum Thread, carry out the following steps:

i. Click  . The **Insert Forum Link** window is displayed.

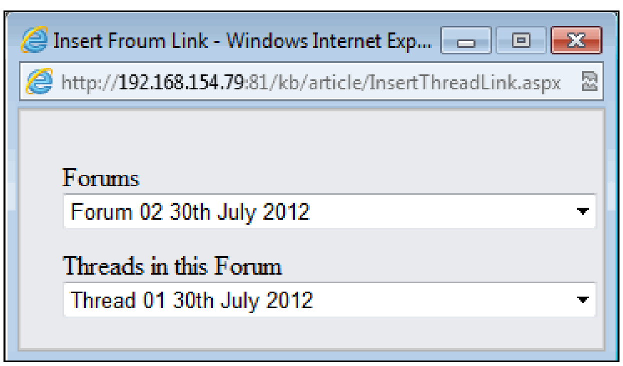


Figure 22 Insert Forum Link Window

ii. In the **Forums** field, select the Forum which has the Forum Thread you want to link.
iii. In the Threads in this Forum field, all the Forum threads within the Forum selected in the Forums field are listed. Select the Forum Thread you want to link.
iv. Click **Select**. The **Forum** link is created.

> **Note:**
>
> When you preview the Article, and click the Forum link you inserted, the Forum thread will not be displayed in the Preview window. You must view the Article on the Portal to check if the Forum link works.

19. You can insert hyperlink to an external website. To do so:
    i. Click . The **Hyperlink Information** window is displayed.

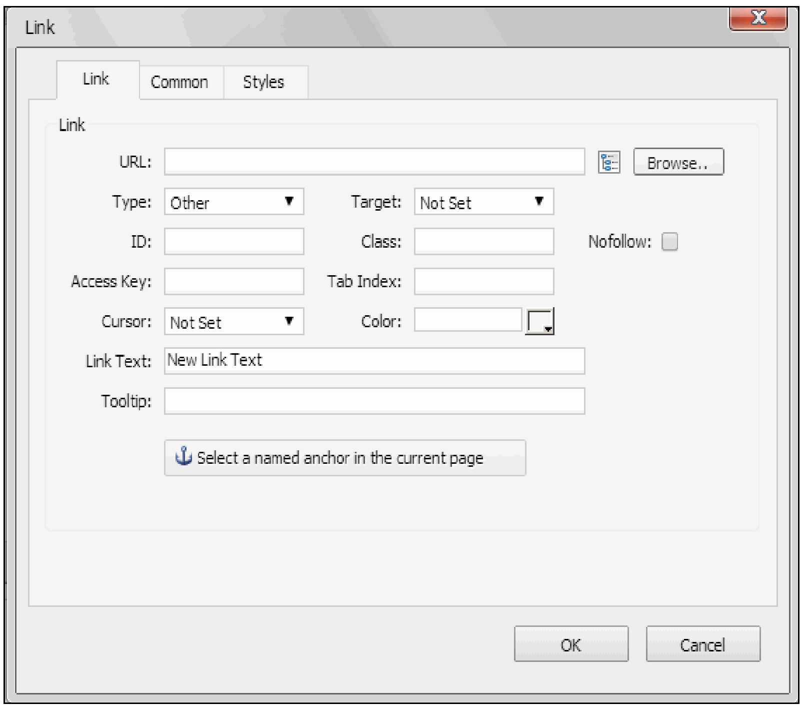


Figure 23 Hyperlink Information Window

    ii. In the URL field, specify the url of the external website. For example, http:\\www.google.com.
    iii. Click **OK**. The Hyperlink is created.
20. Click **Save** to save the Article. The **Versions** tab of the **Article Information** page is displayed with the new Article.

    - OR -

    Click **Save and Check In** to save and check in the Article into the Portal.

    - OR -

    Click **Discard** to delete the Article without saving. A message box is displayed prompting you to confirm the deletion of the incomplete Article. Click **OK** to confirm the deletion of Article without saving.

> **Note:**
>
> When you save the Article, the Article will remain checked-out, and locked for other users. Other users cannot edit the Article however, the users can check-in the Article to edit.

The following figure illustrates the Article Information page:

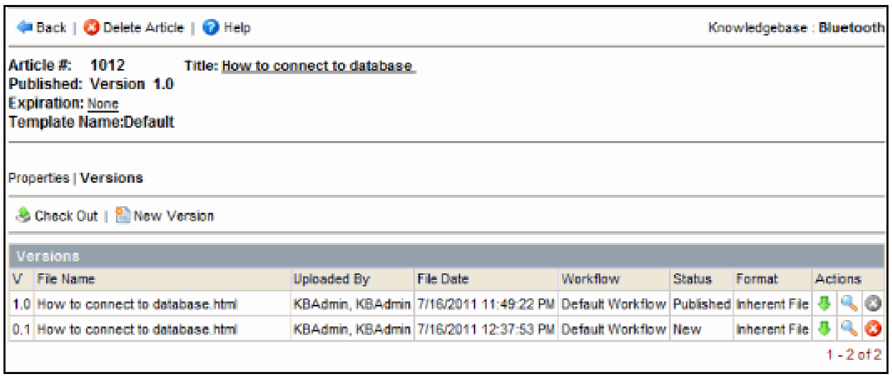


Figure 24 Article Information Page Showing the Details of an Article

To Create a New Article Using Import File

1. In the navigation bar, click New Article .
   - OR -
   From the **Content** tab, click View in the Knowledge Base section. A list of Knowledge Bases is displayed. Select a Knowledge Base for the new Article, and click New Article.
   The **New Article** page is displayed.

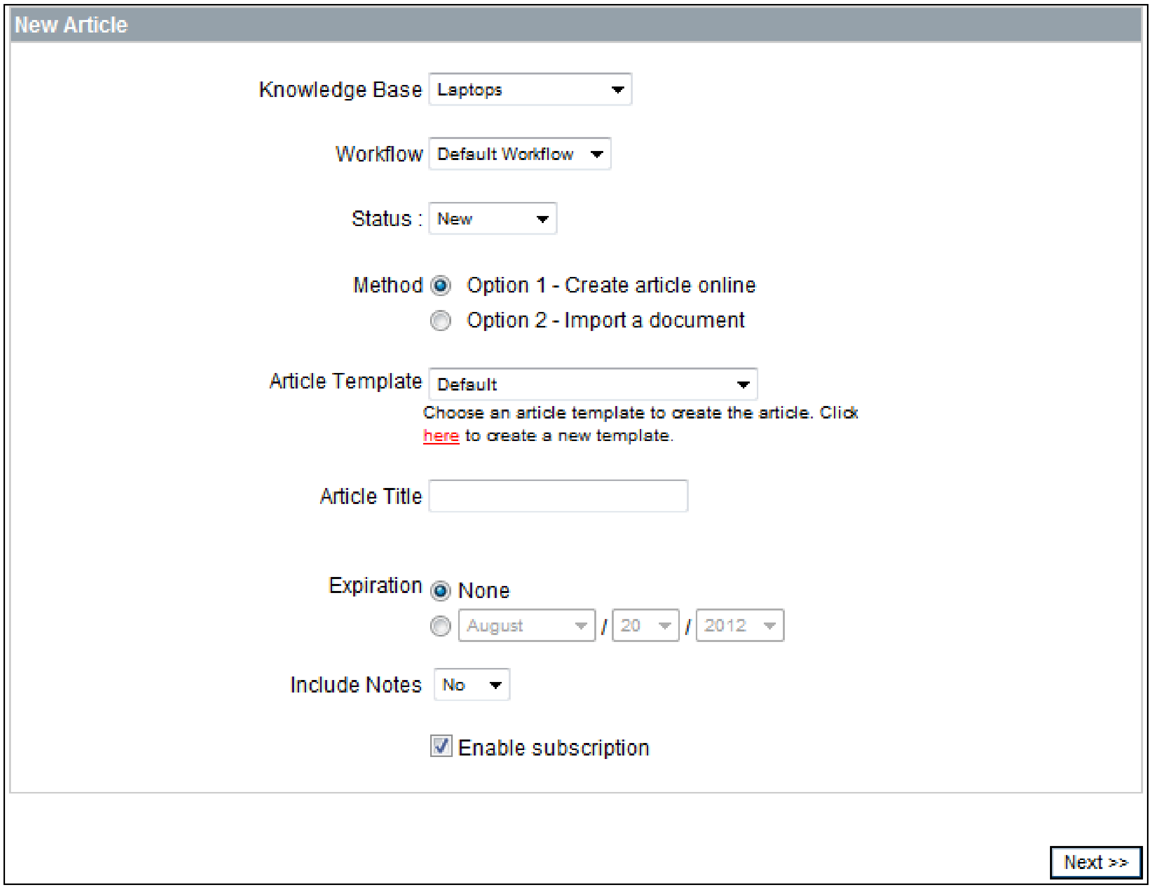


Figure 25 New Article Page

2. From the **Knowledge Base** list, select the Knowledge Base where you want the new Article to reside.
3. From the **Workflow** list, select the Workflow you want to assign to the Article. This list includes the Workflows that your Administrator has granted you access. The Workflow associated with a version enables the version to progress through a series of Workflow steps defined for the Workflow.
4. From the **Status** list, select the Workflow step where you want to place the Article. The statuses defined for the selected Workflow are included in this list. The list includes the steps that your Administrator has granted you access.
5. Select **Option 2 – Import a documen**t.

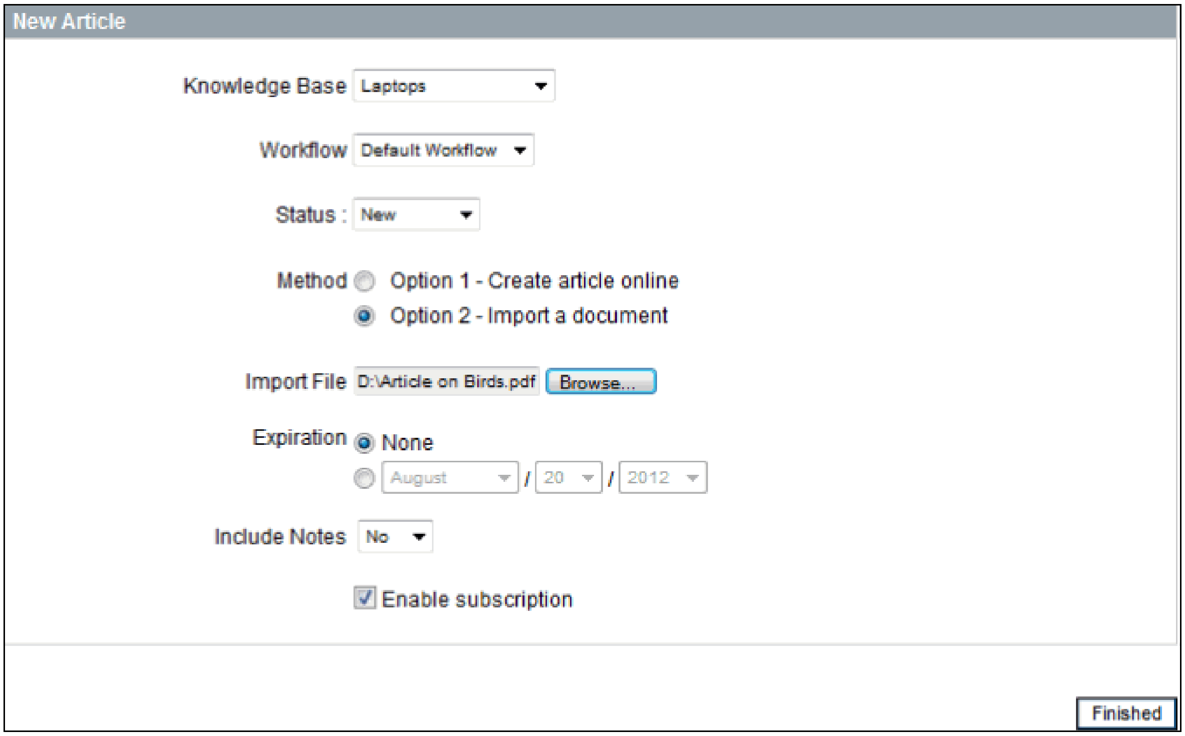


Figure 26 Selecting the Option 2 - Import a Document Method

This option enables you to import a file from the location that your local system has accesss to rather than create it online.

6. In the **Import File** option, click the **Browse** button to locate, and select the file you want to upload. By default, the following file types can be uploaded: .**doc/docx, .xls/.xlsx, .ppt/.pptx, .pdf, .html, .htm**, and **.txt.** To inquire about other file types, contact your Knowledge Spaces Administrator.

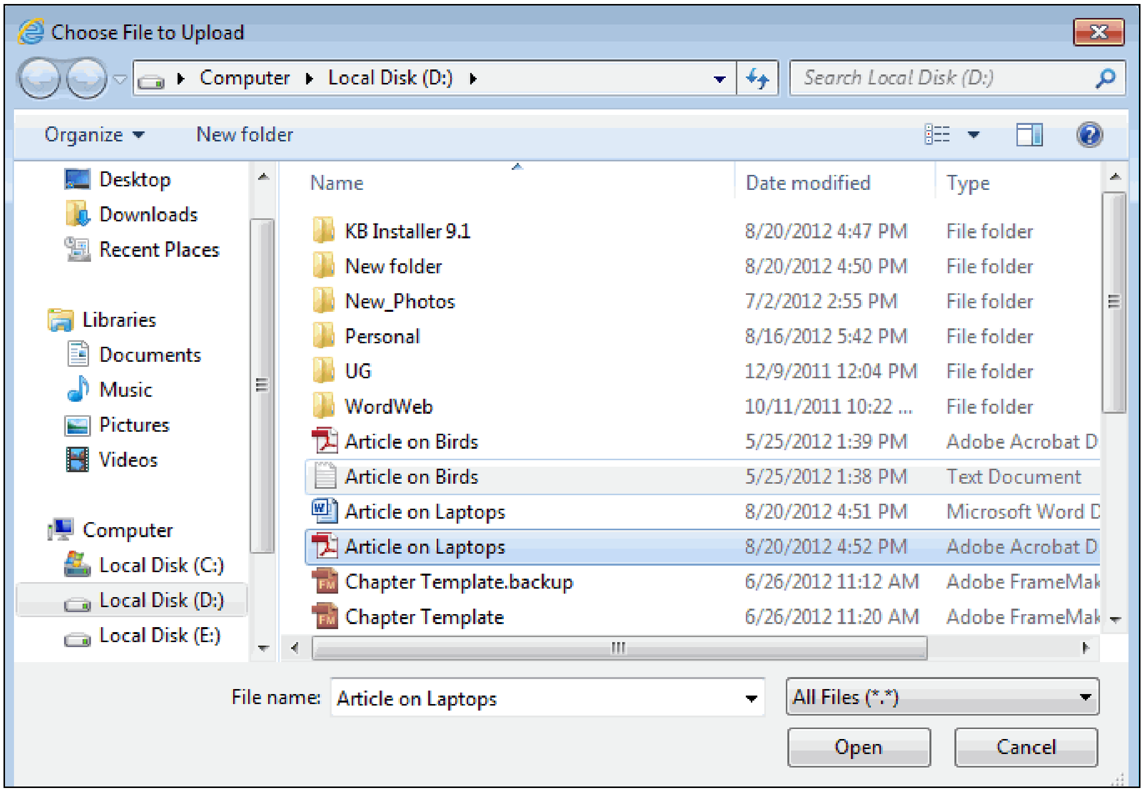


Figure 27 Choose File Window to Locate the File to be Uploaded

> **Note:**
>
> The Portal users must have Adobe Acrobat Reader installed to view the pdf files on the Portal.

7. Select **Open**. The location of the selected file is displayed in the Import File field.

> **Note:**
>
> The maximum limit for the file size of the Article depends on the Article size settings located in the System Settings section of the Administration tab.

8. From the **Expiration** options, enter a date of expiration for the Article if you want to set the expiration date for an Article. By default, the Expiration is set to **None.**
9. From the **Include Notes** list, select **Yes** to include a note for the Article. If you do not want to add a note, proceed to Step 11.

   The Subject and Note fields are displayed.

10. Enter the subject of the note in the **Subject** field.
11. Enter the Body of the Note in the **Notes** field.
12. Select the **Enable subscription** option if you want users to be able to subscribe to the Article.

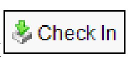
> **Note:**
>
> You can also select the Enable subscription option later, by editing the Article Properties.

13. .Click **Finished**. The **Article Information** page is displayed after the Article is uploaded.

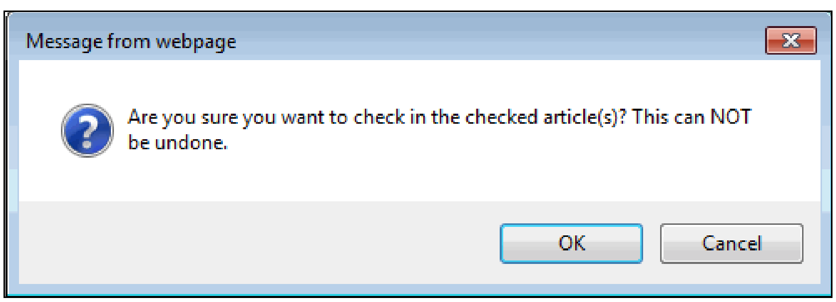
Checking In the Articles

To perform a bulk check in of the Articles, carry out the following steps:

> **Note:**
>
> You can do a bulk check in of only the Articles that you have checked out.t Articles.

14. On the **Article Management** page, click the  check out icon link to sort the Articles listed on the page by the checked out status.
15. Select the check box(es) to the left of the Article(s) you want to check in.
16. Click 

from the Article Management toolbar. A message box is displayed prompting you to confirm the check in of the Article(s).



17. Click **OK** to confirm the check in of Article(s). The selected Articles are checked in.

Copying Articles

You can copy Articles from one Knowledge Base to another, from the Article Management page.

> **Note:**
>
> You must be granted the **Copy Article** permission to copy Articles from one Knowledge Base to another.

To Copy an Article

1. On the Article Management page, select the check box(es) to the left of the Article(s) you want to copy.
2. Click 

 from the **Article Management** toolbar. A message box is displayed prompting you to confirm the copying of the Article(s).

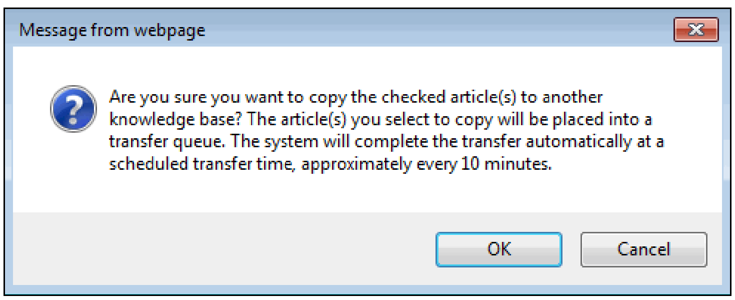


Figure 28 Copy Articles Confirmation Dialog Box

3. Click **OK**. The **Target Knowledge Base** page is displayed.

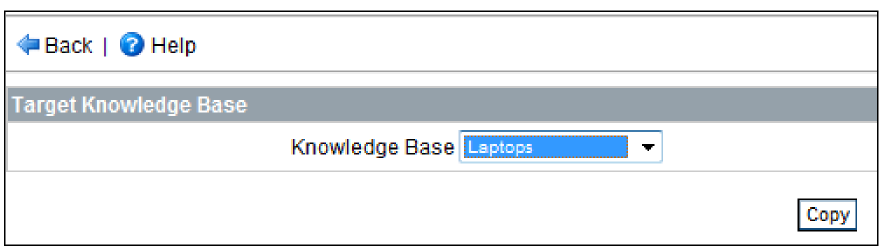


Figure 29 Target Knowledge Base Page

4. From the **Knowledge Base** list, select the Knowledge Base to which you want to copy the Article(s).
5. Click **Copy.** The Article(s) are copied to the selected Knowledge Base.

> **Note:**
>
> After you have copied the Article(s), the Article(s) are placed in a queue that runs on a scheduled basis. The default time is 10 minutes for the copied Article(s) to be listed and displayed in the target Knowledge Base.

Changing Article Workflow Status

Article status is the Article's current position in the publishing Workflow. As the Article moves through the publishing process, it passes through a number of Workflow steps that have been set up as part of the Workflow.From the Article Management page, you can change the Workflow status for many Articles simultaneously.

> **Note:**
>
> You must be granted the **Change Status** permission to change the Workflow status of Article(s).

To Change the Work flow Status of Article(s)

1. On the **Article Management** page, select the check box next to each Article whose workflow status you want to change.
2. Click **Status**. A message box is displayed prompting you to confirm the status change for the Article(s).

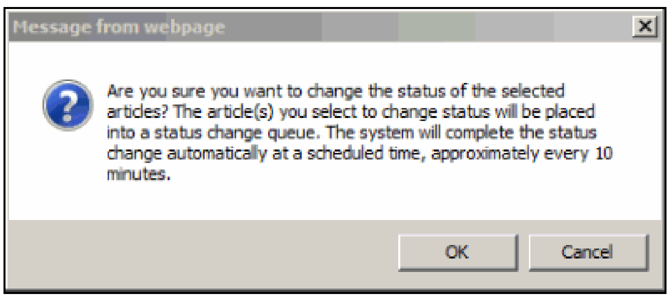


Figure 30 Change Article Status Confirmation Dialog Box

3. Click **OK.** The **Target Article Status** page is displayed.

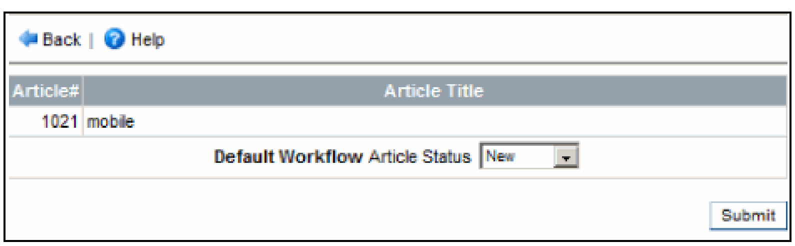


Figure 31 Article Status Page

4. From the **Article Status** list, select the Article status you want to assign to the Article(s).
5. Click **Submit**. The Workflow status of the first version of the Article is changed.

Note:

- Portal users see only the Published version of an Article.
- When you change the status of a version of Article to Published, the status of a previously published Article automatically changes to **Expired**.
- The Articles you select for a change of status are placed in a change status queue. The system completes the transfer at a scheduled time, so the Articles may not appear in their new Workflow step immediately. Contact your Knowledge Spaces Administrator for information on the change status queue settings.
- You can also change the status of an Article from the Versions tab on the Article Information page.
- The Workflow steps to which an Internal User can move an Article, is based on Internal Access Profile assigned to the user.

Categorizing Multiple Articles

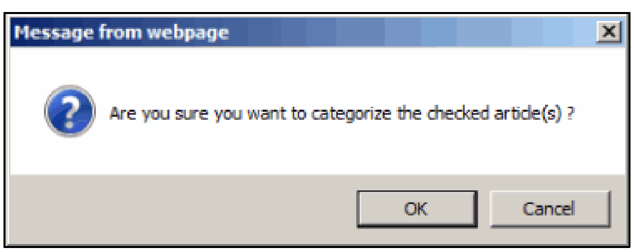
You can categorize several Articles in one operation.

Note:

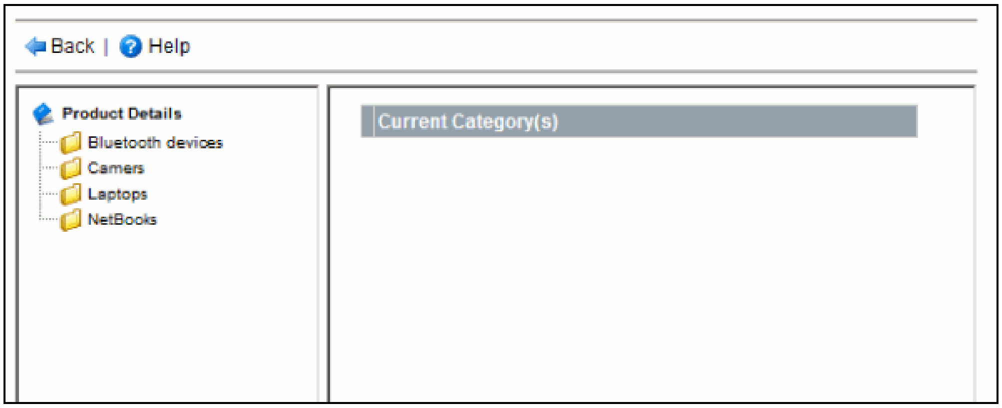
- You must be granted the **Categorize Article** permission to categorize Articles.
- To categorize an Article, you require the **Edit** permission for the Workflow step in which the Article is currently placed.

To categorize multiple Articles, carry out the following steps:

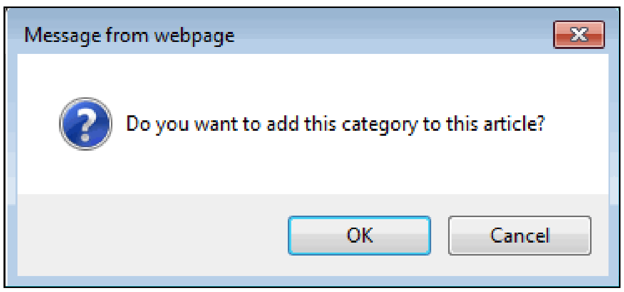
1. On the **Article Management** page, select the check box next to each Article you want to categorize, and click **Categorize**. A message box is displayed prompting you to confirm the categorization of the selected Article(s).



2. Click **OK**. The **Knowledge Base Categories** structure is displayed.



3. Select the Category or the Sub-category into which you want to place the selected Article(s). A message box is displayed prompting you to confirm the categorization of the Article(s).



Click **OK**. The Articles are added to the Category.

> **Note:**
>
> - You can add the Article(s) to multiple Categories.
> - You can also categorize an Article from the Properties tab on the Article Information page of the Article.

Adding Multiple Articles to Article Groups

From the **Article Management** page, you can add multiple Articles to one or more Article Groups.

> **Note:**
>
> - You must be granted the **Set Group** permission to add multiple Articles to Article Groups.
> - To add an Article to an Article Group, you require the **Edit** permission for the Workflow step in which the Article is currently placed.

To add multiple Articles to Article Groups, carry out the following steps:

1. On the **Article Management** page, select the check box next to each Article that you want to add to an Article Group.
2. Click  . A message is displayed prompting you to confirm the grouping of the Article(s):

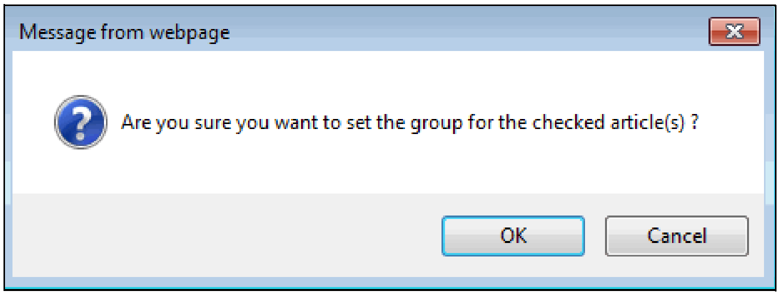
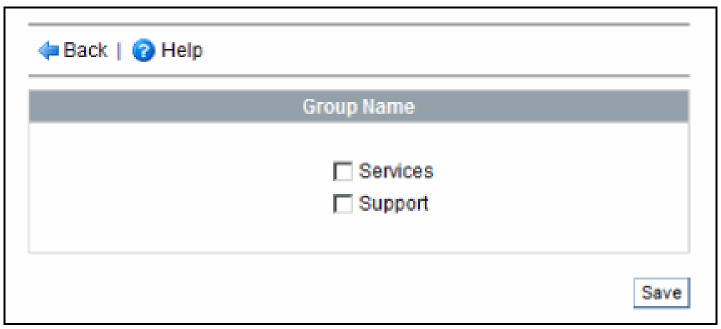


Figure 32 Confirmation Dialog Box to Add the Article to an Article Group

3. Click **OK**. The **Article Groups** page is displayed.



4. Select the check box next to the **Article Group(s)** to which you want to add the selected Article(s).
5. Click **Save**.

Note:

The Grouping feature is useful if you have at least one Secure or Personalized Portal.

Tip:

You can also add an Article to the required Article Groups from the **Properties** tab on the **Article Information** page of the Article.

Deleting Articles

You can delete Articles from the **Article Management** page.

> **Note:**
>
> You must be granted the **Delete Article** permission to delete the Articles.

To delete Articles from the Article Management page, carry out the following steps:

1. On the **Article Management** page, select the check box(es) to the left of the Article(s) you want to delete.
2. Click 

. A message box is displayed prompting you to confirm the deletion of the Article(s):

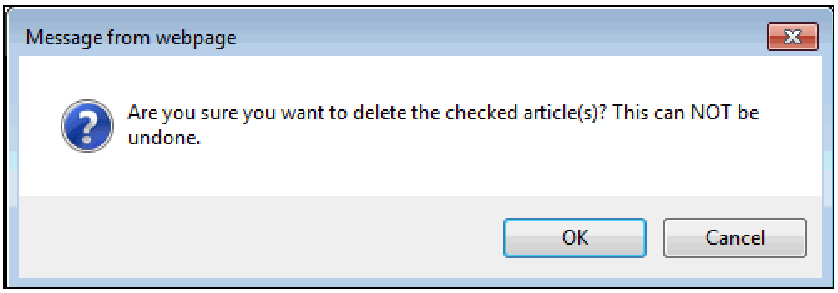


Figure 33 Delete Articles Confirmation Dialog Box

3. Click **OK** to confirm the deletion of Article(s).

   The selected Articles are deleted from the Knowledge Base.

Sorting Articles

From the **Article Management** page, you can sort the Articles by using the following Sort methods:

- Article ID
- Title
- Date Last Modified
- Check out/Check in Status
- Author

To sort Articles using one of the above sorting methods, click the relevant column heading.

For example, to sort Articles by the Article title, click on the **Article Title** link. The Articles will be sorted in the alphabetical order of Article titles.

Published Version and Latest Version Columns

The **Published Version** and **Latest Version** columns on the Article Management page display version specific information about the Articles. The **Published Version** column displays the version number of the published version of each Article listed on the page. The **Latest Version** column displays the version number of the latest version of each Article listed on the page.

You can click the **Details** link displayed next to the version number in the **Latest Version** column to view the properties of the **Latest version** of the Article.

> **Note:**
>
> If none of the versions is published for an Article, the **Published Version** column displays **None** for the Article.

The following figure shows the Article Properties displayed for the Latest Version of an Article:

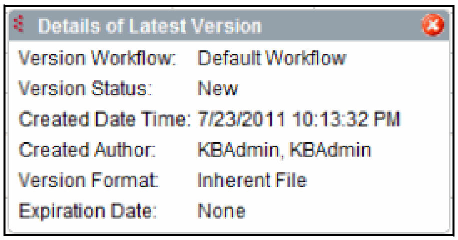


Figure 34 Details of Latest Version Dialog Box

The following table describes the Article Properties displayed for the Latest Version of an Article:

Column	Description
Version Workflow	The workflow associated with the Latest Version of the Article.
Version Status	The status of the Latest Version of the Article.
Created Date Time	The Date, and time the latest Article version was created.
Created Author	The Internal User who created the latest version of the Article.
Version Format	Indicates the format of the Article version.
Expiration Date	The expiry date set for the Latest version of the Article.

Article Information Page

The Article Information page for an Article provides the general information about a selected Article. You can set Article properties, and create versions of the Article from this page. To open the Article Information page of an Article, from the Article Management page, click any Article, the following figure shows a sample Article Information page:

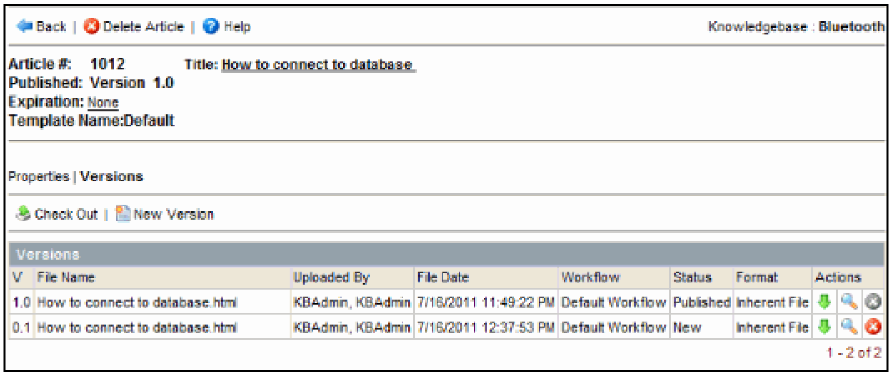


Figure 35 Article Information Page

The Article Information page includes the general Article information area, and two tabs, the Properties tab, and the Versions tab. The general Article information area includes details such as the Title, Article ID, the check out or check in status, the active version of the Article, the Article Expiration information, and the Knowledge Base with which the Article is associated.

The Properties tab enables you to configure properties for an Article.

The Versions tab enables you to maintain multiple versions of an Article.

Changing the Title of an Article

You can change the Title of the Article from the Article Information page. To do so, carry out the following steps:

1. In the general Article information area, click the link associated with the Title field. The Title of the Article is displayed in an editor text field.
2. In the text field, enter a new Title for the Article.
3. Click **Save**. The specified name is displayed as the Title of the Article.

In the **Article Information** page, you can change the Article Expiration information. You can either set the Expiration date for the Article as **None**, or you can specify an Expiration date. To do so, carry out the following steps:

1. In the general Article information area, click the link associated with the **Expiration** field. The radio buttons with the options **None**, and current date are displayed.
2. Select the **None** option if you do not want to set any **Expiration** date for the Article.

   -OR-
3. Select the required Expiration date from the list.
4. Click **Save**. The Article Expiration information is modified with the new value.

Properties Tab

The Properties tab includes the following sections:

- Attributes
- Article Groups
- Attachments
- Categories
- Exact Match Keywords

- Priority Keywords
- Questions (FAQ)
- Related Articles
- Related Links
- Notification
- Subscription
- Notes
- Article History
- Locale
- Manual Summary
- Reference Word
- Base And Derived Articles
- Embedded Articles
- External Notes

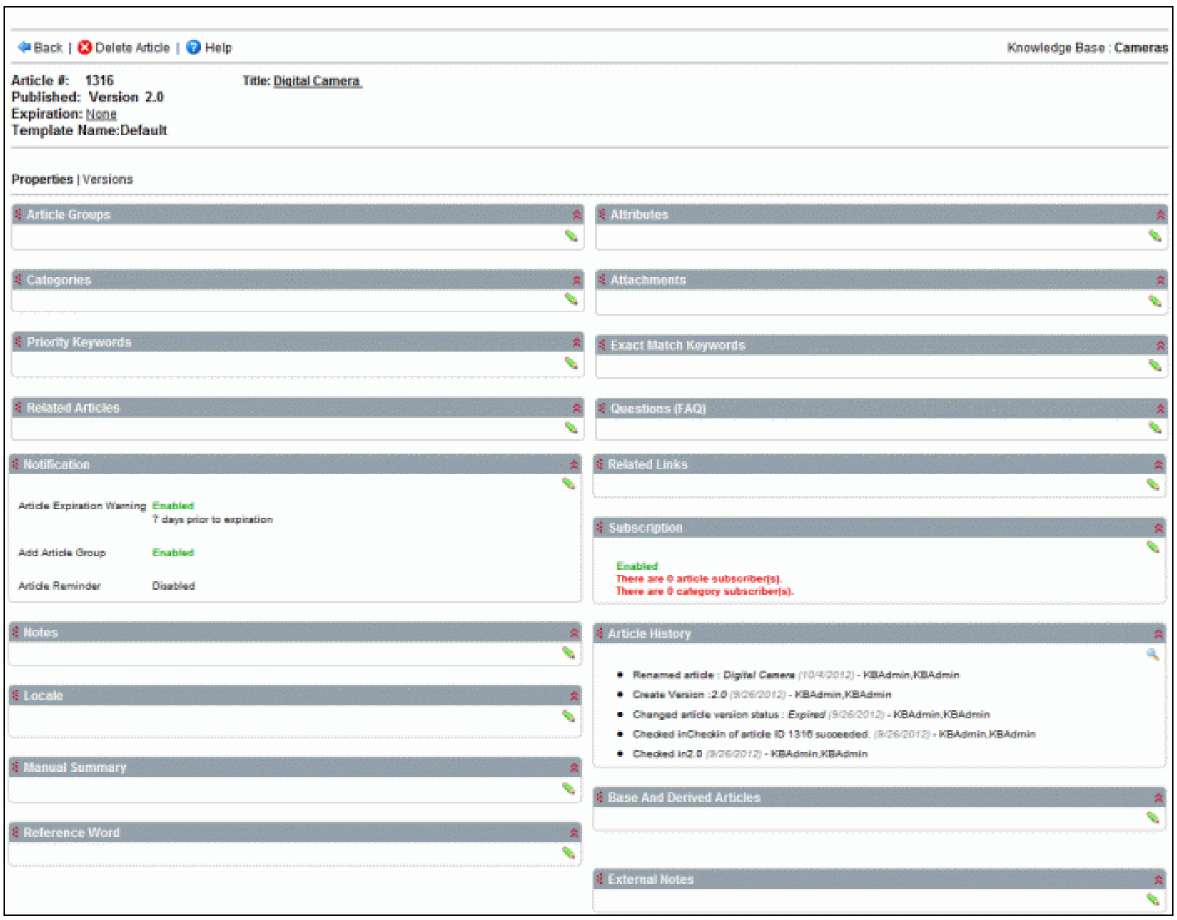


Figure 36 Properties Tab on the Article Properties Page

Article Groups

The **Article Groups** section displays the Article Groups to which the Article belongs. This area provides the option to place the Article into the Article Groups that are created from the Article Groups page. A Portal user can view the Article, provided the user and/or Portal has been given access to the Article Group(s) in which the Article is placed.

Adding an Article to an Article Group

1. From the **Article Groups** section, click . The **Article Group** page is displayed.

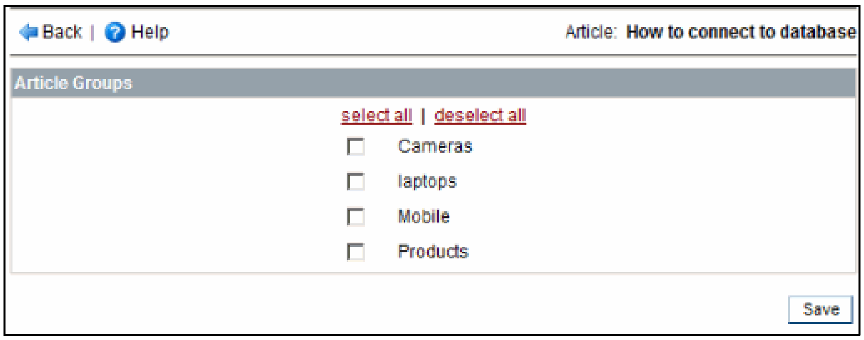


Figure 37 Article Group Page

2. Select the Article Group(s) into which you want to include the Article.

   - OR -

   Click **Select all** to select all the listed Article Groups.
3. Click **Save**. The Article is added to the selected Article Group(s).

Removing the Article from an Article Group

1. From the **Article Group** section, click adjacent to the Article Group from which you want to remove the Article. The **Article Group** page is displayed.
2. Clear the selection of the **Article Group** from which you want the Article to be removed.
3. Click **Save**. The Article is removed from the Article Group.

Note:

- You can also remove an Article from an Article Group by clicking the main **Edit** icon in the **Article Group** section.

Categories

The Categories section displays the Categories to which the Article belongs. This area provides the option to associate an Article to the Categories that are created in the Category Management page.

Adding an Article to a Category

1. From the **Categories** section, click . The **Current Category(s)** page is displayed.

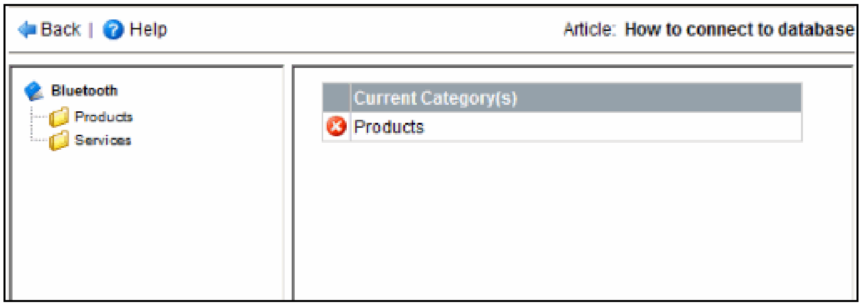


Figure 38 Current Category(s) Page

In the left pane on the **Current Categories** page, click the Category to which you want to add the Article. A message is displayed to confirm the addition of the Category to the Article.

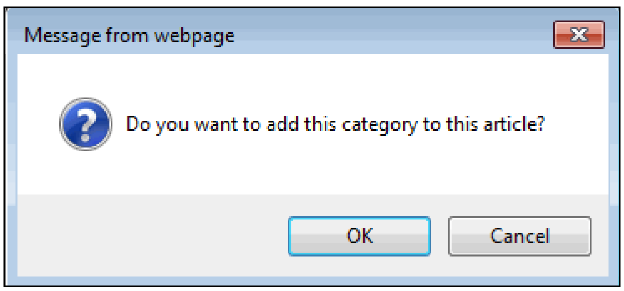


Figure 39 Confirmation Dialog Box to Add the Article to a Category

2. Click **OK**. The Article is added to the Category.

> **Note:**
>
> The Current Category(s) page displays only the Categories under the Knowledge Base(s) to which the selected Article belongs.

Removing the Article from a Category

1. From the **Categories** section, click adjacent to the Category from which you want to remove the Article. A message is displayed to confirm the removal of the Article from the Category.

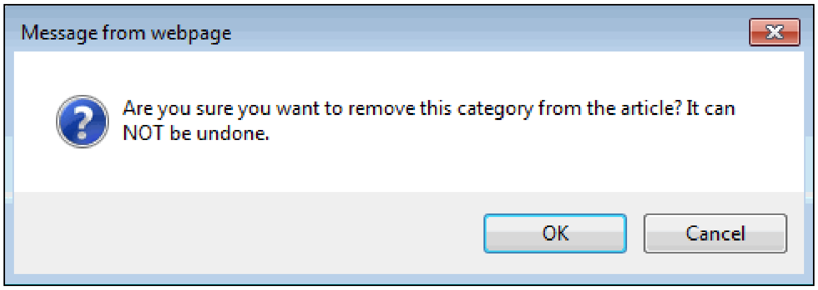


Figure 40 Confirmation Dialog Box to Remove the Article from a Category

2. Click **OK**. The Article is removed from the Category.

> **Note:**
>
> For more information about Categories, **see "Categories" on page 58.**

Priority Keywords

The **Priority Keywords** section displays the list of keywords associated with the Article. You can configure the weight of the Priority Keywords associated with an Article. When a Portal user searches for Articles by specifying a Priority Keyword, the order in which the Articles associated with the Priority Keyword and the other Articles with the Keyword in the Article text are listed depends on their cumulative scores. The Article scoring highest score is listed first in the list, and the remaining Articles are listed in descending order by their cumulative scores.

> **Note:**
>
> The following points can have an effect on an Article's cumulative score:
>
> - Search Engine assessment of conceptual relevance of content to search string.
> - Whether and how frequently any of the searched for words exist in the Article Title.
> - Whether and how frequently any of the searched for words exist in the Article Body.
> - Whether any of the searched for words are also Priority Keywords.
> - Whether any of the searched for Words are included in FAQs.

Example:

If an Article associated with a Priority Keyword has been assigned a total weight of 5 which is equivalent to a cumulative score of 15, and there is another Article that has 16 instances of the same Keyword in the Article text, the later Article is listed first on the Portal Search Results page.

.From the **Priority Keywords** area, you can add, and delete the Priority Keywords associated with an Article.

Adding Priority Keywords to an Article

1. From the **Priority Keywords** area, click . The **Priority Keywords** page is displayed.

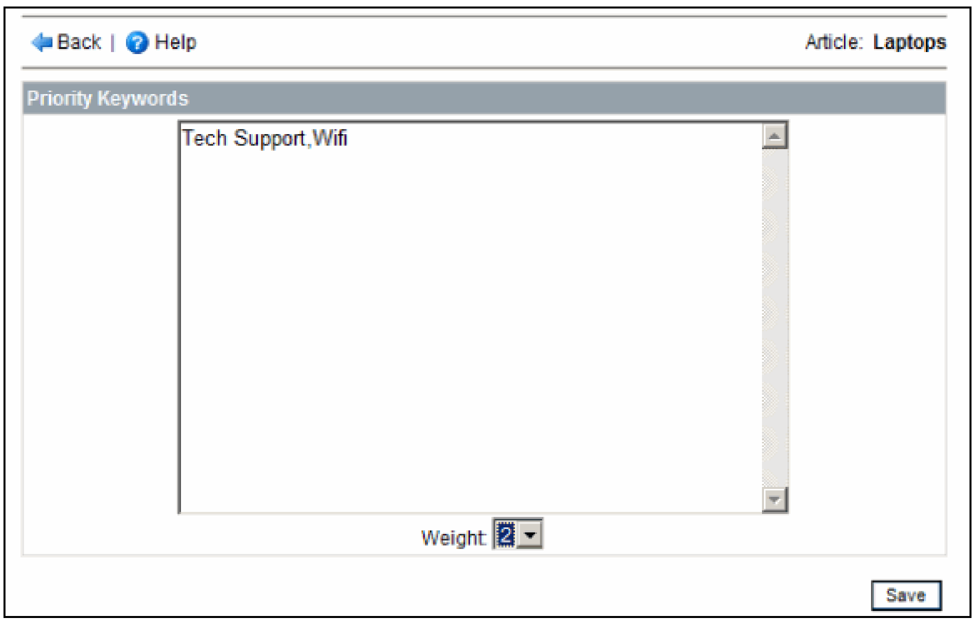


Figure 41 Priority Keywords Page

2. In the text area, type the keywords separated by a comma.
3. In the **Weight** list, specify the weight to be associated with the Priority Keyword(s).The following table describes the weight options you can set for Priority Keywords:

Weight	Description
1	Setting the weight of the Priority Keyword to 1 is equivalent to adding the Keyword three times in the Article text.
2	Setting the weight of the Priority Keyword to 2 is equivalent to adding the Keyword six times in the Article text.

Weight	Description
3	Setting the weight of the Priority Keyword to 3 is equivalent to adding the Keyword nine times in the Article text.
4	Setting the weight of the Priority Keyword to 4 is equivalent to adding the Keyword twelve times in the Article text.
5	Setting the weight of the Priority Keyword to 5 is equivalent to adding the Keyword fifteen times in the Article text

4. Click **Save**.The keywords are associated with the Article.

Note:

- Adding keywords to Articles is optional, since the search engine will provide full text indexing of Knowledge Base documents in formats such as HTML, Word, Excel, PDF, PowerPoint, and Text. Keywords are helpful in relating content to non-indexable file types, such as image and multimedia files.
- You need not leave spaces between keywords, as long as commas separate them.
- To remove a keyword associated with the Article, click in the **Priority Keywords** area. The **Priority Keywords** page is displayed. Remove the required keyword, and click **Save.**

Tip:

- Think carefully about the keywords that you relate to an Article. Too many keywords might unnecessarily make the Article appear too often, or too few keywords can make the Article too hard to find.
- To address Spelling errors, you can define Synonyms instead of Priority Keywords as the Synonym engine will work on all uses of the word.

  Synonym engine is not available to Hosted customers.

Related Articles

The **Related Articles** area displays the list of Articles that relate to the Article. When a Portal user views the Article associated with Related Articles, the **Related Articles** link is displayed with the Article, provided they have access to the Related Articles. On clicking the link, the Related Articles window with a list of related Articles is displayed. The Portal user can view the Articles by clicking the link.

Adding a Related Article to the Article

1. From the **Related Articles** area, click . The **Add New Related Article** page is displayed.

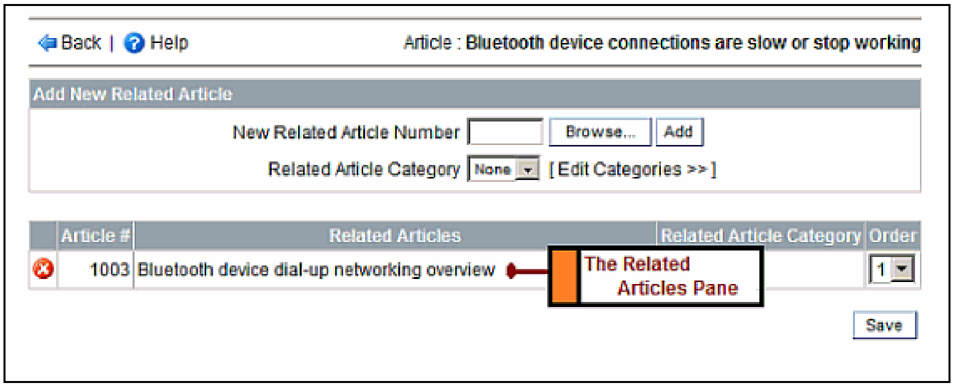


Figure 42 Add New Related Article page

2. In the **New Related Article Number** field, enter the ID of the Article you want to link to the Article.

   - OR -

   Click **Browse**, and select the Article you want to link.

3. To Categorize the Related Article, select the appropriate Category from the **Related Article Category** list.

> **Note:**
>
> You can click the **Edit Categories** link adjacent to the **Related Article Category** list to create new Related Article Categories.

4. Click **Add**. The Article is listed in the Related Articles pane.

> **Note:**
>
> If there is more than one Article listed in the Related Articles pane, from the Order list, select the order in which you want the Related Articles to be displayed on the Portal.

5. Click **Save**. The Related Article is displayed in the Related Articles area.

> **Note:**
>
> - To remove a Related Article associated with the Article, click adjacent to the Related Article. A message box is displayed prompting you to confirm the removal of the Related Article. Click OK to remove the Related Article.
> - To view the content of a Related Article, click adjacent to the Related Article.

Notification

The **Notification** area displays the Notification information set for the Article. From this area, you can set reminders for the Article, and enable or disable the Article Expiration Warning and Article Expiration Notification features. You can set the following Notifications for the Article:

- Article Expiration Warning
- Article Expiration Notification
- Article Reminder

To set the Article notifications, from the Notification area, click . The Notification page is displayed.

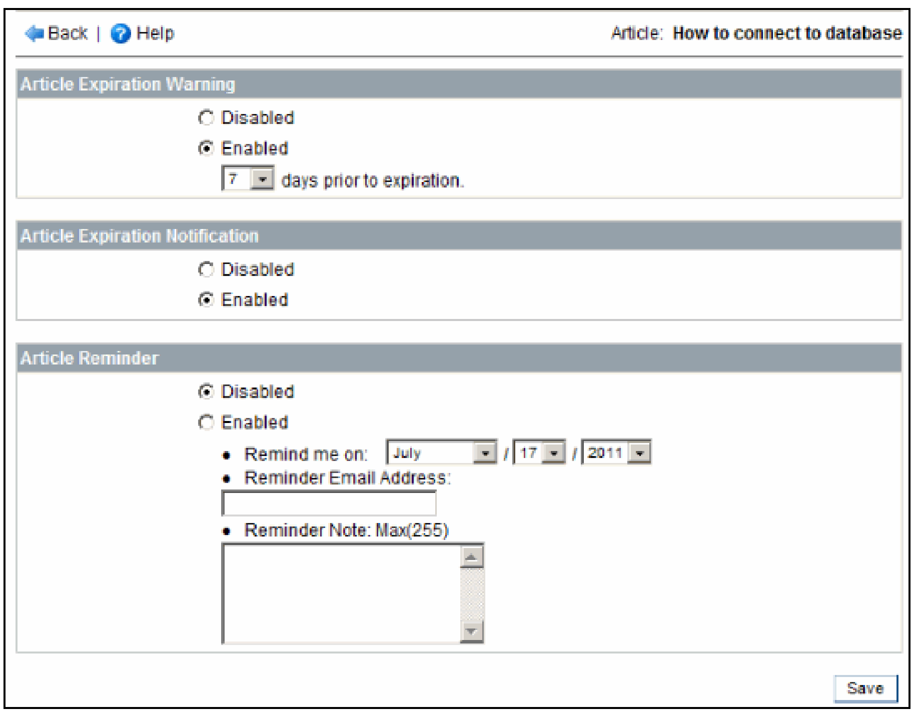


Figure 43 Notification Page

Article Expiration Warning

The Article Expiration Warning is a way of notifying Internal Users before an Article has reached its expiration date. When an Article expires, it is moved from the Published Workflow step, to Expired, and is no longer available in the Portals for the Portal users to access. If any of the Internal Users must be informed before an Article expires, use the Article Expiration Warning feature to notify the necessary parties. If activated, the system automatically sends an email message to the selected Internal Users, notifying them of the pending Article expiration.

To set the Article Expiration Warning for the Article, carry out the following steps:

1. In the **Article Expiration Warning** area on the Notification page, select Enabled.
2. In the **days prior to expiration list**, select the number of days before expiration that you want the email notification to be sent.
3. Click **Save** to save the settings.

Note:

- Select **Disabled** in the Article Expiration Warning area if you do not want the Article Expiration warning to be sent to the Users.
- From the Email Administration section on the Administration tab, you can configure the warning message, and the email address(es) of the Users to whom the message has to be sent. For more information,see **"E-mail Administration" on page 446**.

Article Expiration Notification

The Article Expiration Notification is a way of notifying Internal Users that an Article has reached its expiration date. When an Article expires, it is moved from the Published Workflow step, to Expired, and is no longer available on the Portals for the Portal users to access. To enable the Article Expiration Notification feature for the Article, select Enabled in the Article Expiration Notification area on the Notification page, and click Save.

The Email addresses and the text of the notification Email are created through the Email Administration section of KB Admin Control Panel.

Note:

- Select **Disabled** in the **Article Expiration Notification** area if you do not want the Article Expiration notification to be sent to the Users.
- From the Email Administration section on the Administration tab, you can configure the Expiration Notification message, and the email address(es) of the Users to whom the message has to be sent.
- The Expiration Notification Enabled or Disabled default setting for an Article depends on the Knowledge Base setting in the **Email Administration** section on the Administration tab. If you change the Expiration Notification **Enabled** OR **Disabled** settings for an individual Article, the setting overrides the Knowledge Base settings.

Article Reminder

The **Article Reminder** feature enables you to configure reminder messages or notifications to be sent to the Internal Users about the Article. This feature is not intended to be an expiration warning, or notification. It provides the ability to associate unique messages, set for a certain date, to various Internal Users.

Enabling the Article Reminder Feature for an Article

1. In the Article Reminder section on the Notification page, select the **Enabled** option to set a reminder.
2. In the **Remind me on** field, select the date on which you want the reminder to be sent.
3. In the **Reminder Email Address** field, enter the comma-separated email address(es) to which the reminder must be sent.
4. In the **Reminder Note** field, enter the content of the reminder message.
5. Click **Save** to save the Reminder settings.

Example:

You have created an Article that contains information about a Microsoft software update. When the update is released, you will need to change your Article. Set a reminder by specifying the date when the software update is released, the reminder note, and the Email address(es) of the Users to whom you want the reminder to be sent.

Notes

The **Notes** area displays the subject of the five most recent notes added to the Article. This area enables authors, and editors to provide information about the edits, and the changes made, or general comments that need to be logged along with the Article. Notes are commonly used when passing an Article from one Workflow step to another, with instructions for the next editor.

Associating Notes to an Article

1. From the **Notes** area, click . The **Article Notes** page is displayed.

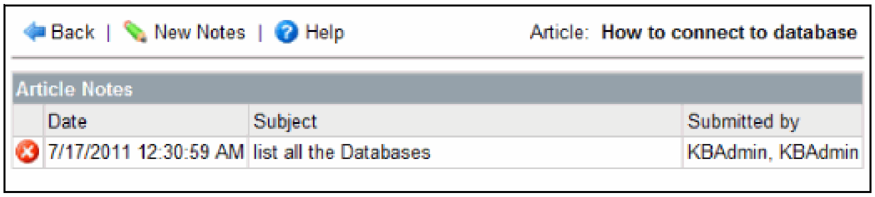


Figure 44 Article Notes Page

2. Click **New Notes**. The New Article Notes page is displayed.
3. In the **Subject** field, specify a suitable subject for the Note.
4. In the **Notes** field, specify the description of the Note.
5. Click **Next**. A preview of the Note is displayed on the Preview Article Notes page.
6. Click **Save**. The Note is saved.

> **Note:**
>
> To delete a Note, click adjacent to the Note in the Notes area on the Article Information page.
>
> To view a Note, click adjacent to the Note in the Notes area on the Article Information page.
>
> You can also delete a Note from the Article Notes page, by clicking adjacent to the Note.

Locale

The **Locale** area displays the Locale that is set for the Article. Locale is used in conjunction with the Portal Language setting to restrict the Article search by the preferred language.

Setting the Locale for an Article

1. From the **Locale** area, click . The **Edit Customer Portal** page is displayed.

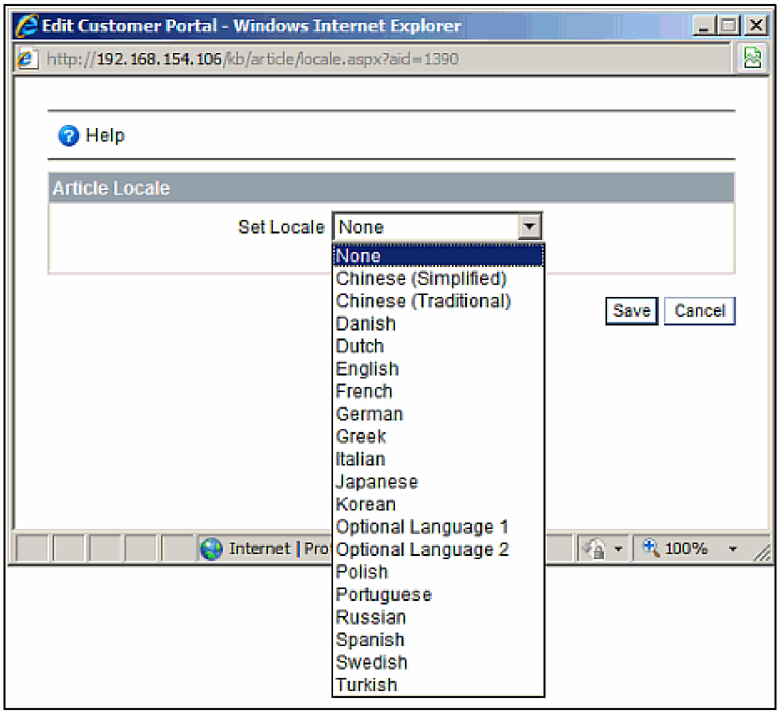


Figure 45 Edit Customer Portal Window

2. From the **Set Locale** list, select the Locale you want to set for the Article.
3. Click **Save** to save the setting.

Note

- ***Locale*** is an internal setting and does not affect search.
- ***Portal language*** settings control UI strings only.

Users can have content in any number of languages in a portal. The portal successfully returns search results as long as the IDOL configuration file is set to recognize the languages in a portal and its content is properly recognized by IDOL. The config file includes out-of-the-box support for over a hundred languages. Users cannot modify this file.

See ***About Search Engine Administration*** **Page 452**
Also refer the *Spaces by Moxie™ - Knowledge Spaces™ 9.4 Advanced Autonomy Configuration Guide.*

Attributes

The **Attributes** area displays the Attribute(s) associated with the Article. The Attributes area provides options to assign Attributes to the Article, and delete Attribute(s) associated with the Article. If a Portal is configured to display the Attributes, the Attribute(s) associated with the Article are displayed with the Article in the Portal Search results area.

Assigning Attributes to an Article

1. From the **Attributes** area, click . The **Current Attributes** page is displayed.

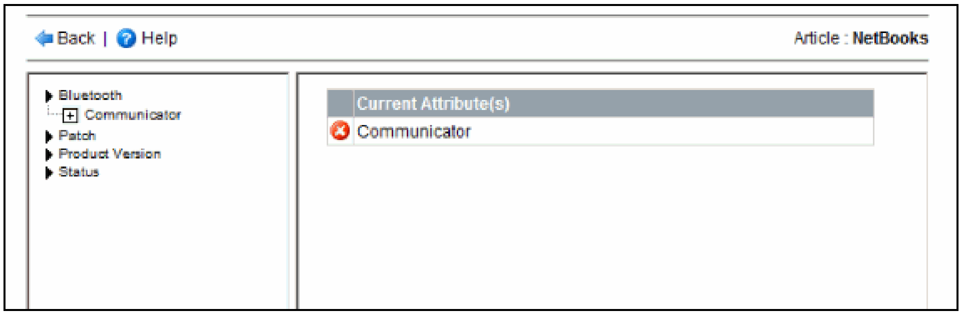


Figure 46 Current Attributes Page

2. In the left pane on the Current Attributes page, click the **Attribute**, and select the appropriate Sub-Attribute to which you want to add the Article. A message box is displayed prompting you to confirm the addition of the Attribute to the Article.

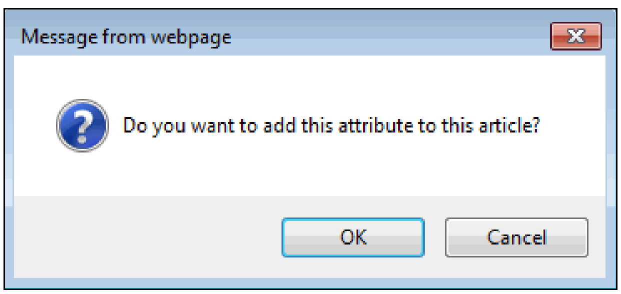


Figure 47 Attribute Addition Confirmation Dialog Box

3. Click **OK** to associate the Attribute to the Article.

> **Note:**
>
> To remove an Attribute, click to the left of the Attribute.
>
> For more information about Article Attributes, see **"Article Attributes" on page 158**.

Attachments

The **Attachments** area displays information about the attachments associated with the Article. This information includes the name, and the file type of the attachment. When a Portal user views an Article that is associated with attachments, the **Attachments** link is displayed with the Article. On clicking the link, the Attachments window with a list of attachments is displayed. The Portal user can view the related attachment by clicking the link. From the **Attachments** area you can associate an attachment to an Article, remove an attachment from the Article, download an attachment, and upload a file to the Article Library.

Adding Attachments to an Article

1. From the **Attachments** area, click . The Article Attachment page listing the files in the Attachment Library, and the files currently attached to the Article is displayed.

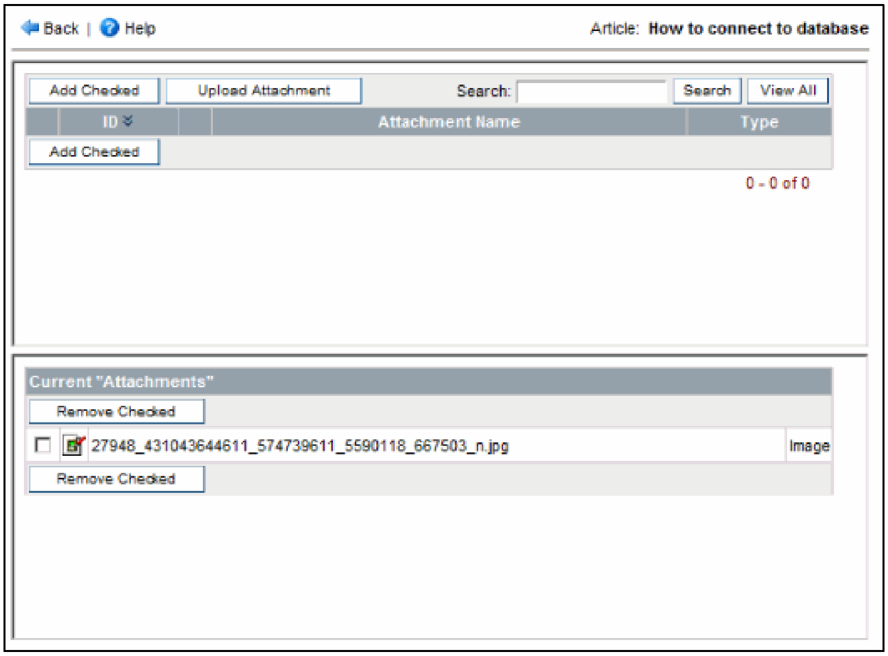


Figure 48 Article Attachment Page

2. From the list of attachments, select the file you want to associate with the Article.
3. Click **Add Checked**. The selected file is attached to the Article and listed in the **Attachments** area.

Removing an Attachment Associated with an Article

1. From the **Attachments** area, click . The Article Attachment page listing the files that are already attached to the Article, and the files that are uploaded to the Attachment Library is displayed.
2. From the **Current Attachments** section, select the file to be removed.
3. Click the **Remove Checked** button to remove the attachment.

Note:

- You can download a file attached to the Article by clicking adjacent to the file name in the Attachments area of the Properties tab.
- In the Article Attachment page you can upload a file to the Article Library by clicking the Upload Attachment button.
- In the Article Attachment page, you can search for a file that is uploaded to the Attachment Library.
- For more information about storing and managing files that can be used as Article attachments, see **"Attachment Library" on page 116**.

Exact Match Keywords

The **Exact Match Keywords** area displays the exact match keywords associated with the Article. The **Exact Match Keywords** area provides option to add exact match keywords to the Article. You can assign a keyword, or a set of keywords to the Article. When a Portal user uses the exact match keyword search criteria to search for the Articles, only the Articles associated with the specified keyword are listed on the Portal.

You can also edit, and delete the Keywords associated with the Article.

Adding Exact Keywords to the Article

1. From the **Exact Match Keywords** area, click . The **Exact Keywords** page is displayed.

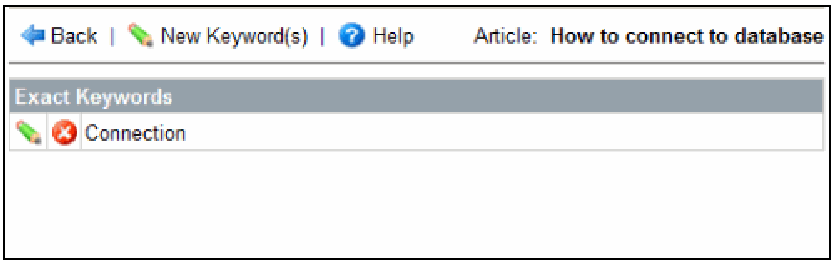


Figure 49 Exact Keywords Page

2. Click **New Keyword(s)**. The **Create Exact Keyword(s)** page is displayed.
3. Enter the Exact Keyword(s), or phrase(s) to be associated with the Article.
4. Click **Save**. The Keywords are associated with the Article.

Editing an Exact Keyword

1. From the **Exact Match Keywords** area, click adjacent to the keyword. The **Edit Exact Keyword** page is displayed.

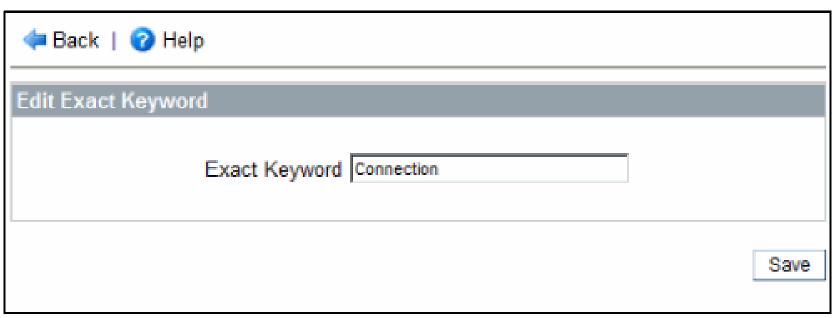


Figure 50 Edit Exact Keyword Page

2. In the **Exact Keyword** field, make the required changes.
3. Click **Save** to save the changes to the keyword.

Note:

To remove an Exact Keyword associated with the Article, click adjacent to the keyword. A message box prompting you to confirm the removal is displayed. Click **OK** to remove the keyword.

Tip:

To achieve the best search result, you must assign a keyword or a set of keywords to only a single Article. If you assign the same keyword to more than one Article, the search results retrieves multiple Articles.

Questions (FAQ)

The **Questions (FAQ)** area displays the questions associated with the Article. In the Questions (FAQ) area, you can associate new questions to the Article, and categorize them. To search for an Article, a Portal user can select the questions from the FAQ tab on the Portal.

Adding Questions to an Article

1. From the **Questions (FAQ)** area, click . The **New Question** page is displayed.

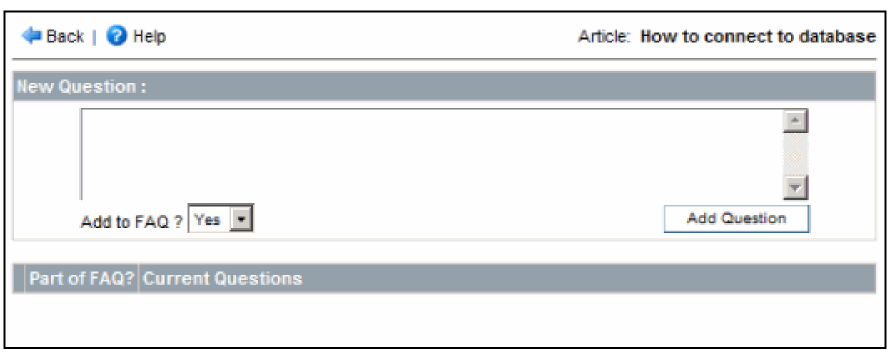


Figure 51 New Question page

2. Type the text of the question (with or without a question mark) in the New Question field.
3. Select Yes in the Add to FAQ? list, and click Add Question to associate the question with the Article, and the Knowledge Base FAQ (Frequently Asked Questions).

   -OR-

   Select **No** in the Add to FAQ? list, and click Add Question to associate the question to the Article without adding it to the Knowledge Base FAQ.

Note:

- To remove a question associated with the Article, click adjacent to the question in the **Questions (FAQ)** area. A message box prompting you to confirm the deletion is displayed. Click OK. The Question is removed.
- In the **Questions (FAQ)** area, the Questions that are part of FAQ are listed with a prefix, FAQ.
- For more information about managing FAQs, see **"Frequently Asked Questions" on page 123**.

Related Links

The **Related Links** area displays the links to the web pages that are related to the Article. When a Portal user views the Article associated with Related links, the **Related Links** link is displayed with the Article. On clicking the link, the Related Links window with a list of related links is displayed. The Portal user can view the related webpage by clicking the link. From the **Related Links** area, you can associate related links to the Article, and remove related links associated with the Article.

For example, if you have an Article that addresses the configuration of the Microsoft Outlook email software, the www.microsoft.com/outlook link can be added as a related link to the Article.

Adding Related Links to the Article

1. From the **Related Links** area, click . The **Add New "Related Links"** page is displayed.

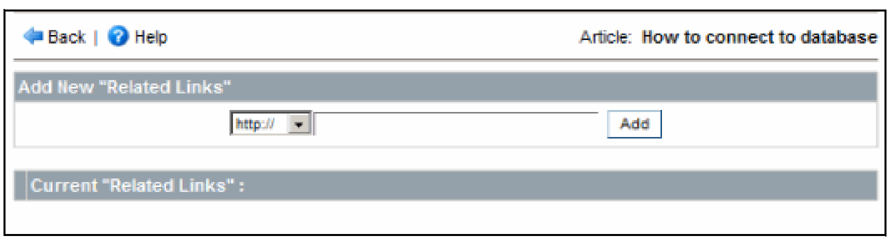


Figure 52 Add New Related Links Page

2. In the **Add New "Related Links"** field, type the Uniform Resource Locator (URL) of the Web page you want to associate to an Article. The default type of the link is http://. You can also select an https://, or a ftp:// type of a link. You see that http:// is coded into the application, hence specify the Web address without http://.
3. Click **Add.** The link is added to the Article, and is displayed in the Current "Related Links" column.

> **Note:**
>
> - Related links are displayed in the order in which they have been added to the Article.
> - There is no limit to the number of links that can be added to an Article.
> - To remove a related link, click adjacent to the Related link in the **Related Links** area. A message box prompting you to confirm the removal is displayed. Click **OK** to remove the related link.

Subscription

The **Subscription** area displays the information about the Article Subscription. The Subscription information includes the Subscription status, the number of Article Subscribers who subscribed to the Article, and the number of Category Subscribers who subscribed to the Article.

Enabling Article Subscription

1. From the **Subscription** area, click . The **Article Subscription** page is displayed.

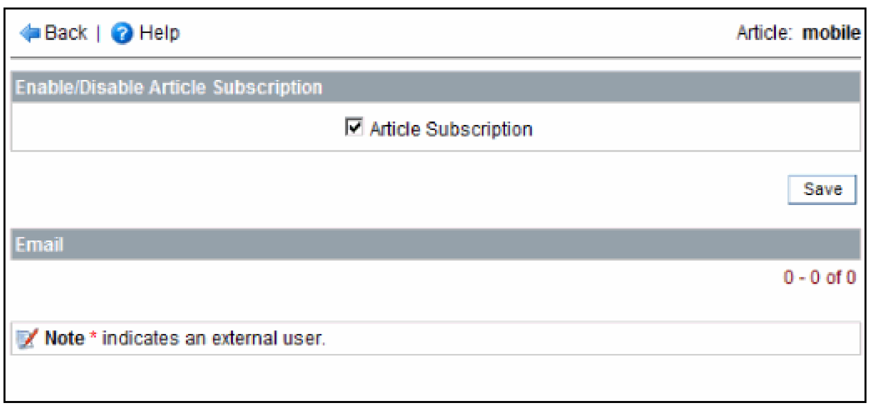


Figure 53 Article Subscription Page

2. Select the **Article Subscription** option to enable the Article subscription for all the Users whose email addresses are listed on the Article Subscription page.
3. Click **Save** to enable the Article Subscription.

> **Note:**
>
> To disable Article Subscription for the Article, on the Article Subscription page, clear the **Article Subscription** option

Notifying the subscribers about Article Updates

1. From the **Subscription** area, click . The **Email Editor** page is displayed.

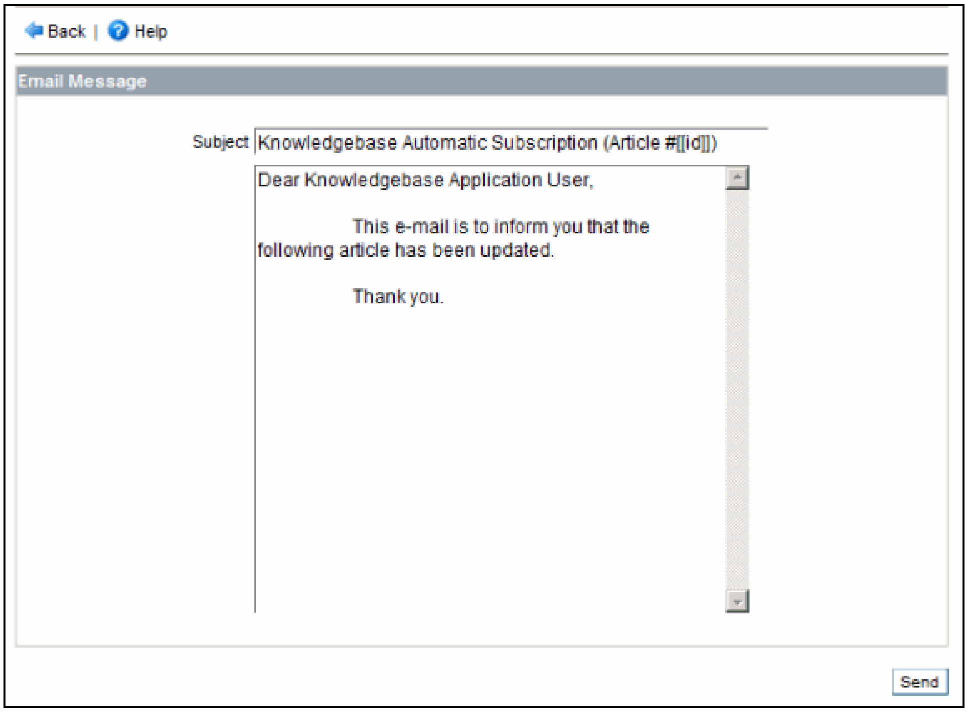


Figure 54 Email Editor Page

2. In the editor, specify the subject and content of the email message.
3. Click **Send.** The notification is sent to the specified recipients.

> **Note:**
>
> For more information about Article Subscription, see **"Article Subscription" on page 165**.

Article History

The **Article History** area displays the five most recent operations on the Article, and the date on which each operation was performed.

Click to view the complete Article History page. You can view the date, and time of the operation, and the User who performed the operation. The following is a partial list of operations that are displayed in Article History page.

- Article created
- Changed display format
- Changed content

- Checked out
- Checked in
- Created new version
- Changed version
- Added to category
- Renamed Article
- Updated notification settings

Specifying a Manual Summary for an Article

The **Manual Summary** area enables you to specify a Synopsis for an Article.

> **Note:**
>
> The **Manual Summary** area on the Article Properties page is displayed for a User only if the **Manual Summary** permission is granted for the User's Internal Access Profile.

To compose a Manual Summary for an Article, carry out the following steps:

1. From the **Manual Summary** area on the Article Properties page of the Article, click . The **Manual Summary** page is displayed.

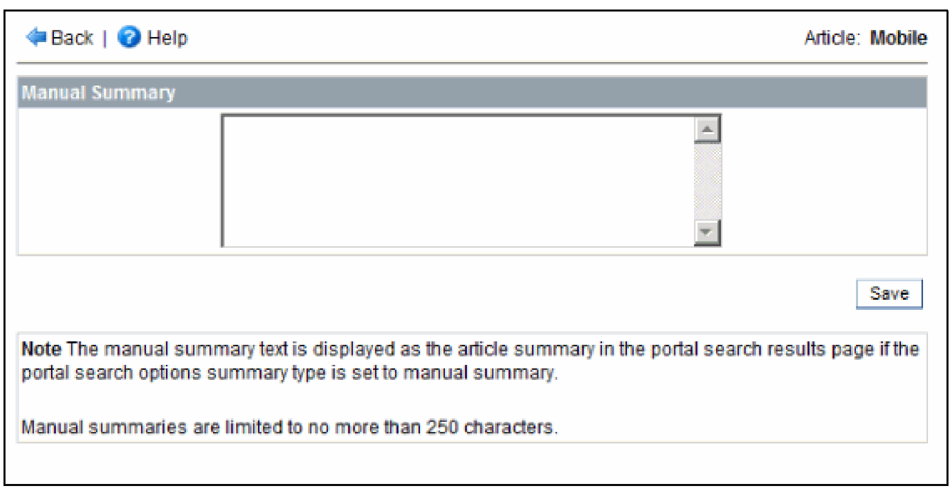


Figure 55 Manual Summary Page

2. Type the synopsis for the Article.
3. Click **Save** to associate the synopsis with the Article.

> **Note:**
>
> You can also configure a Portal to display user defined summaries for the Articles listed on the Search Results page of the Portal.

Specifying Reference Words for an Article

The **Reference Word** area enables you to specify Reference Words for an Article. When a Portal user specifies a search term, if the search term exists as a Reference Word for an Article, that Article is retrieved. Thus, you can specify a Reference Word that may not even exist in the Article itself. Reference Word search is performed by Knowledge Spaces and not by the integrated search engine. Hence, the result displayed for Reference Word search is quick.

> **Note:**
>
> - The **Reference Word** feature can be purchased from Moxie Software™ separately as an add-on licensed module.
> - The **Reference Word** area on the Article Properties page is displayed for a User only if the **Reference Word** permission is granted for the User's Internal Access Profile.
> - On the Portal Search Options page for a Portal, the **Reference Word** option should be selected to enable the users on the Portal to search using a Reference Word.

To specify a Reference Word for an Article, carry out the following steps:

1. From the **Reference Word** area on the Article Properties page of the Article, click . The **Add Reference Word** page is displayed.

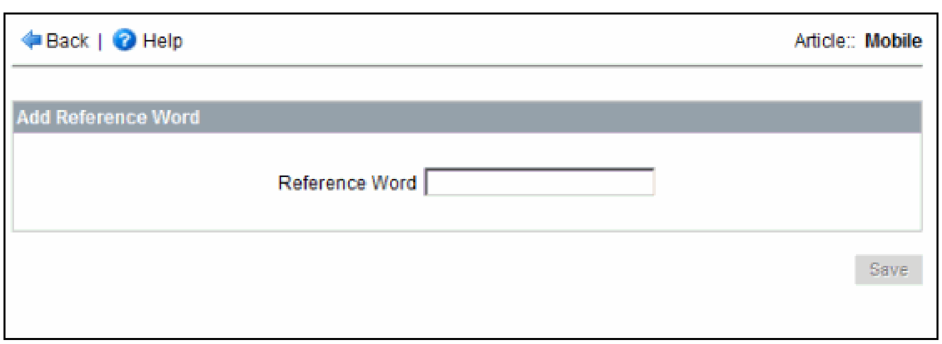


Figure 56 Add Reference Word Page

2. In the **Reference Word** field, specify reference words separated by a comma.
3. Click **Save** to associate the Reference Words with the Article.

> **Note:**
>
> Click in the **Reference Word** area to edit the Reference Word(s) associated with the Article.
>
> Click in the **Reference Word** area to delete the Reference Word(s) associated with the Article.

Base And Derived Articles

The Base and Derived Articles area enables you to set an Article as the Base Article, and the Articles that are created from a parent Article as the Derived Articles. For example, if an Article in English is translated into multiple languages, you can link the translated Articles as Derived Articles of the Article in English. For a Base Article, the Derived Articles area displays the list of child Articles. For a Derived Article, the Base Article area lists the parent Article from which the Article was derived.

Setting an Article as the Base Article

1. From the **Base And Derived** area, click . The **Select Base or Derived Status** page is displayed.

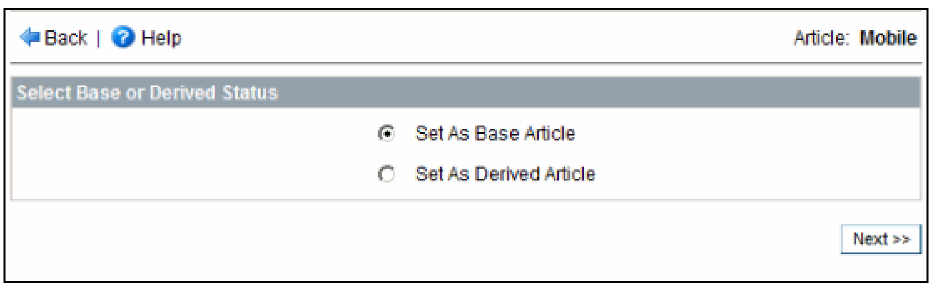


Figure 57 Select Base or Derived Status Page

2. By default, the **Set As Base Article** option is selected. Click **Next**. The **Select Derived Articles** page is displayed.

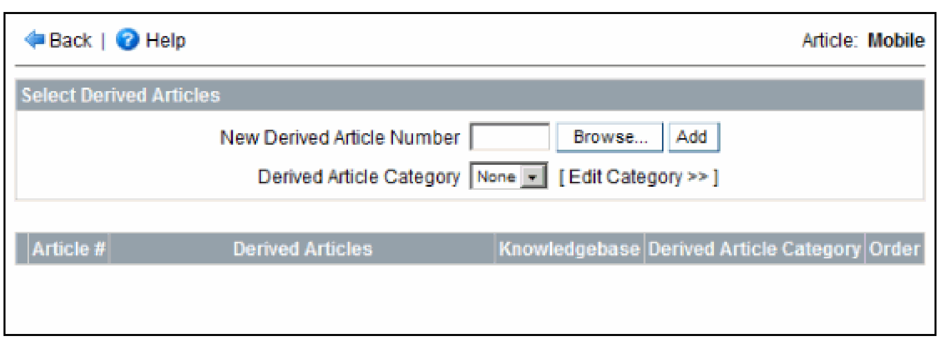


Figure 58 Select Derived Articles Page

3. In the **New Derived Article Number** field, specify the ID of the Article you want to link.

   - OR -

Click **Browse**, and select the Article you want to link.

4. To group the Derived Article, select the appropriate Group from the **Derived Article Group** list.

> **Note:**
>
> You can click the **Edit Group** link adjacent to the **Derived Article Group** list to create new Derived Article Group.

5. Click **Add.** The selected Article is added to the list of Derived Articles.

Figure 59 Derived Articles Page Showing the Derived Article

6. From the **Order** list, select the order in which each Derived Article should be displayed.
7. Click **Save**. The Derived Article is displayed in the **Derived Article** area of the **Properties** tab.

> **Note:**
>
> To remove a Derived Article from the list of Derived Articles, in the **Derived Article** area, click adjacent to the Article. A message box prompting you to confirm the deletion is displayed. Click **OK**. The Article is removed from the Derived Articles list.

Setting an Article as the Derived Article

1. From the **Base And Derived** area, click . The **Select Base or Derived Status** page is displayed.
2. Select the **Set As Derived Article** option.

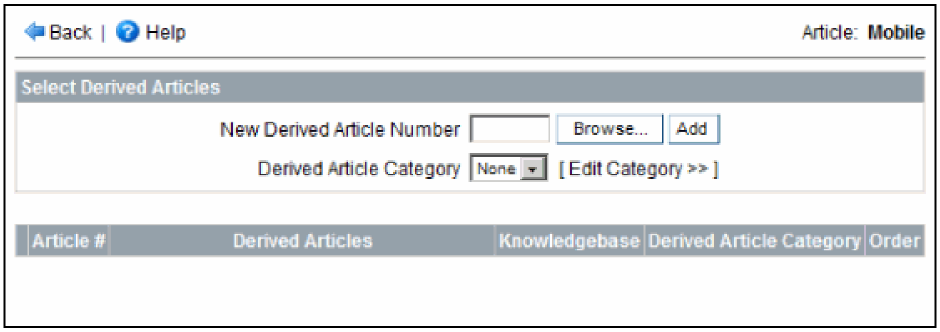


Figure 60 Select Base or Derived Status Page

3. Click **Next**. The **Select Base Article** page is displayed.

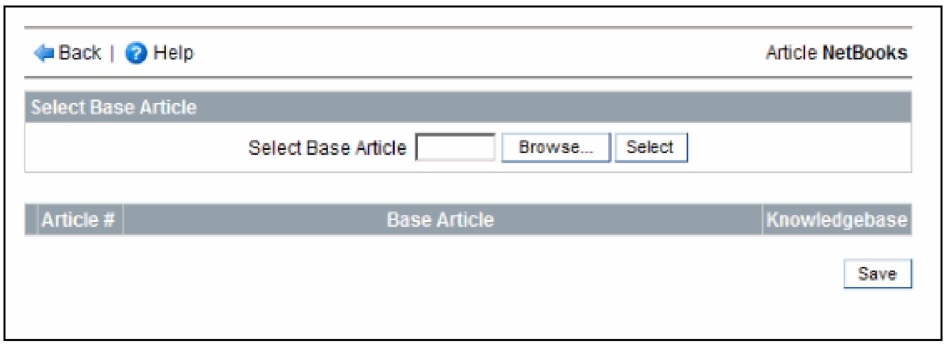


Figure 61 Select Base Article Page

4. In the **Select Base Article** field, specify the ID of the Article you want to link.
   - OR -
   Click **Browse**, and select the Article you want to link.
5. Click **Select**. The selected Article is added to the Base Article area.

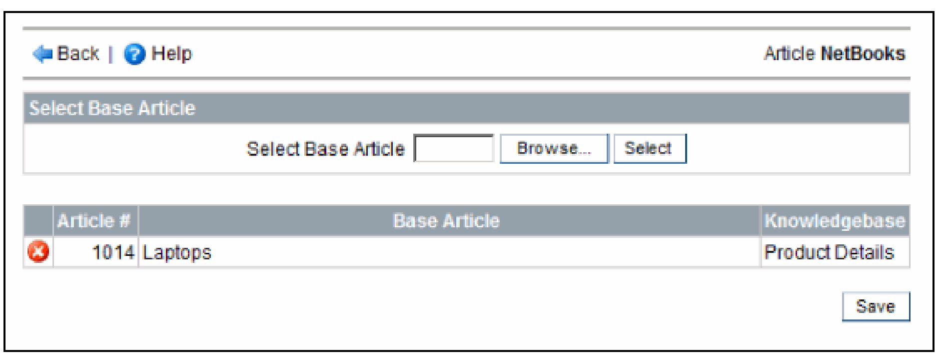


Figure 62 Select Base Article Page Showing the Base Article

6. Click **Save**. The selected Article is added as the Base Article and listed in the **Base Article** area of the Properties tab.

Modifying the Base Derived Relationship

You can remove the Base Article associated with a *Derived Article* and ensure that there is no Base Derived relationship between the two Articles. Additionally, you can also replace the Base Article with a different Base Article. To do so, carry out the following steps:

1. In the **Base Article** area, click adjacent to the Article. A confirmation message is displayed.

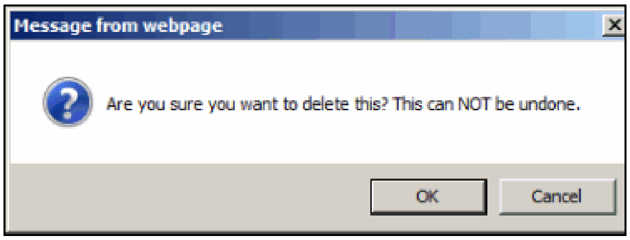


Figure 63 Delete Confirmation Window

2. Click **OK**. The **Base Article Disposition** page is displayed.

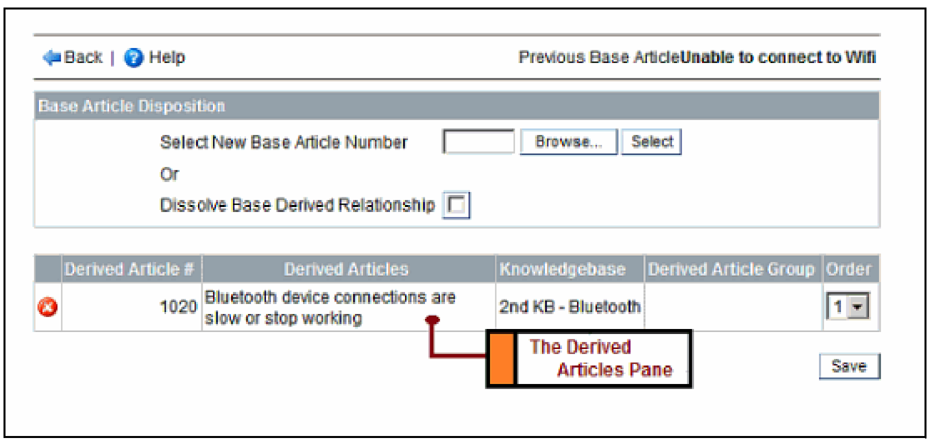


Figure 64 Base Article Disposition Page

3. To remove an Article as the Base Article of the Article, carry out the following steps:
   i. From the **Base Article Disposition** area, select the **Dissolve Base Derived Relationship** option.
   ii. Click **Select**. The Base Article is removed from the Base Article area.
4. To select a new Base Article, carry out the following steps:
   i. In the **Select New Base Article Number** field of the **Base Article Disposition** area, specify the ID of the Article you want to link.

   – OR –

   Click **Browse**, and select the Article you want to link.
   ii. Click **Select**. The selected Article is set as the Base Article of the Article.

> **Note:**
>
> - The Derived Articles pane on the Base Article Disposition page lists the Derived Articles associated with the selected Base Article.
> - To remove a Derived Article associated with the selected Base Article, click the button adjacent to the Derived Article in the Derived Articles pane.

Derived Article Group

In the **Select Derived Articles** page, you can create a Derived Article Group, and categorize the Derived Articles.

Creating a Derived Article Group

1. From the **Base And Derived** area, click . The Select Base or Derived Status page is displayed.
2. By default, the **Set As Base Article** option is selected. Click **Next.**

   - OR -

3. From the **Derived** area, click .

   The **Select Derived Articles** page is displayed.

Figure 65 Select Derived Articles Page

4. Click the **Edit Category** link to the right of the **Derived Article Category** list. The **Category List** page is displayed.

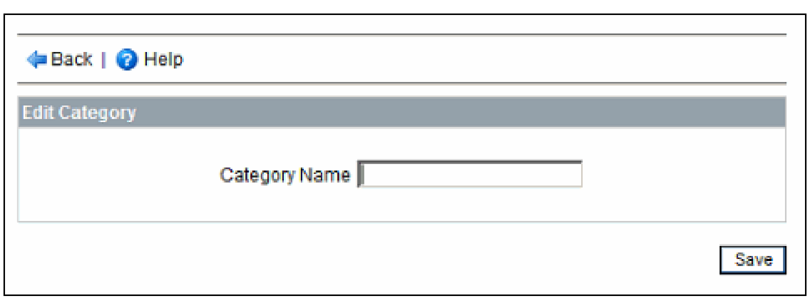


Figure 66 Create Group Page

5. Enter a name for the Group in the **Group Name** field.
6. Click **Save**. The new Derived Article Category is created.

Embedded Articles

The **Parent and Embedded Articles** area on the Article Properties page enables you to embed published Child Articles into a Parent Article. Embedding avoids the task of linking related Articles to an Article. When you embed a Child Article into a Parent Article, a new version of the Parent Article is created. To embed Child Articles into a Parent Article, you must first create an Article Template based on the number of Article Bodies you want in your Parent Article, and then create the Parent Article using the Article Template you created.

> **Note:**
>
> The **Embedded Articles** feature can be purchased from Moxie Software™ separately as an add-on licensed module.

The following figure depicts a sample Article with an Embedded Child Article:

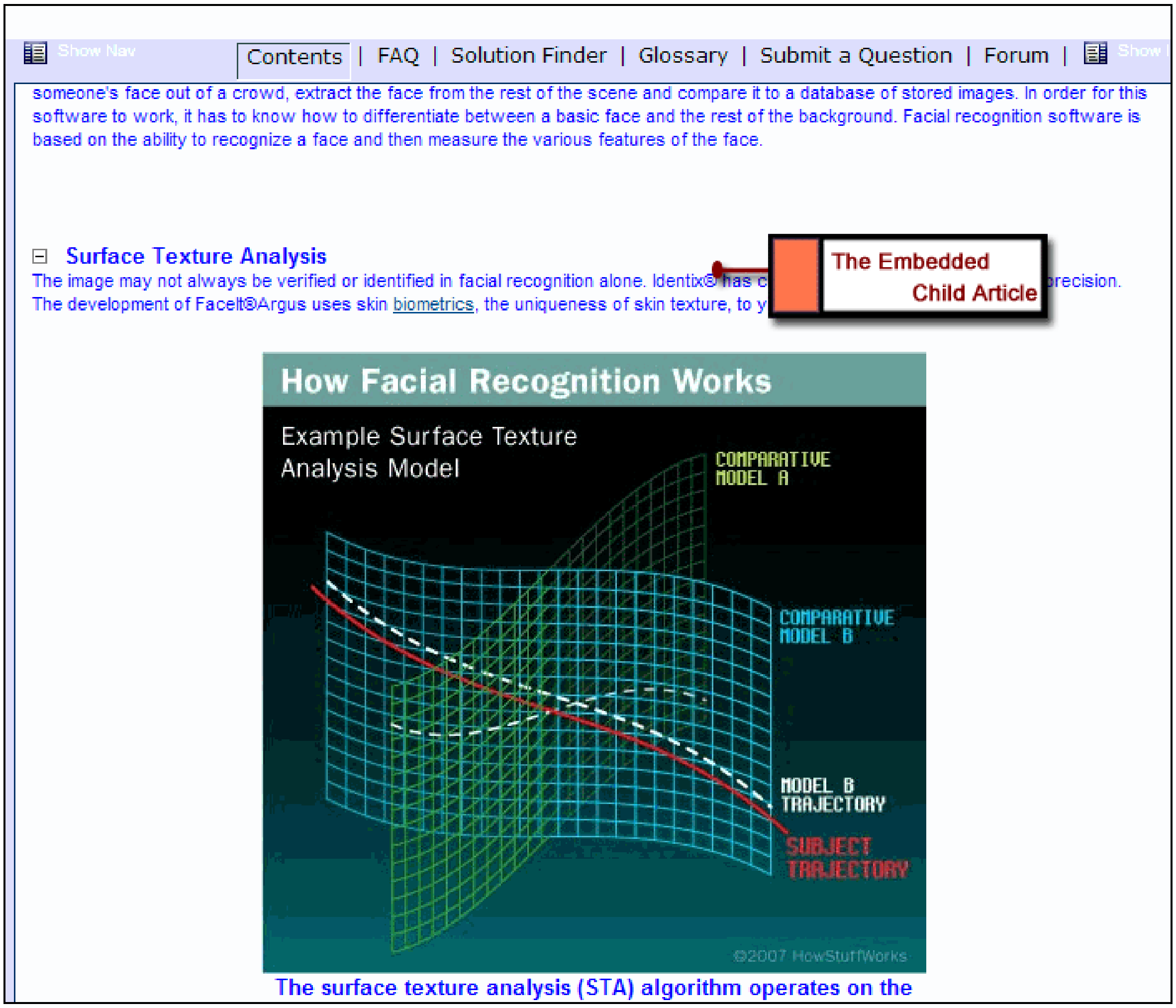


Figure 67 An Article with Embedded Child Articles Displayed on a Portal

The following operations are associated with embedding a Child Article into a Parent Article:

1. Creating an Embedded Article Template
2. Creating a Parent Article using Embedded Article Template
3. Embedding Child Articles into the Parent Article

Creating an Embedded Article Template

An Embedded Article Template must comprise at least one Normal text body, and an Embedded Article body. The Normal text body defines the format style for the Parent Article, and the Embedded Article body defines the format style for the Child Articles to be embedded in the Parent Article. A sample HTML Embedded Article Template that comprises two Normal text bodies, and two Embedded Article bodies is as follows:

```
  <html>
 <head>
            <title>Embedded Doc Template</title>
    </head>

    <body>
            <h1>Special Articles</h1>
            [[articleBody:Normal1]]
            [[articleBody:EmbeddedArticleID1,embed,
               <Title> </Title>,displayTitle]]
            [[articleBody:Normal2]]
            [[articleBody:EmbeddedArticleID2,embed,
               <Title> </Title>,displayTitle]]
   </body>

</html>
```

You must save the above content as .html.

> **Note:**
>
> - Specify the **displayTitle** tag in the Embedded Article Template code if you want the title of the Embedded Child Article to be displayed on the Portal. In the **Title** tag, specify the text to be displayed as the title of the Embedded Child Article.
> - In the **Article Template** code, the embed tag must be associated with the Article Bodies used to place the Child Articles.

To upload an Embedded Article Template, carry out the following steps:

1. From Knowledge Spaces Admin Control Panel, select the **Administration** tab. The Administration page is displayed.
2. Click the **Article Templates** option. The Article Template Home page is displayed.
3. Click . 

 The **New Article Template** page is displayed.

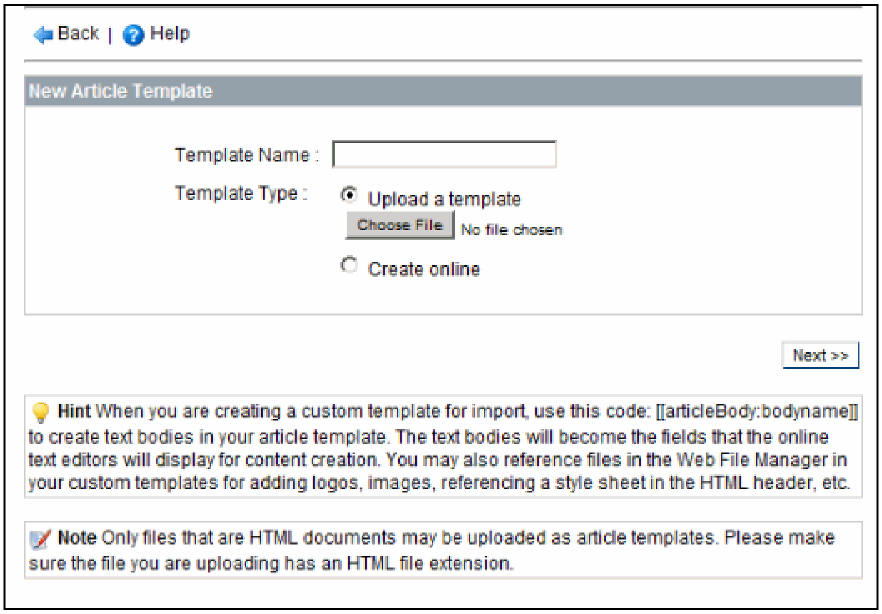


Figure 68 New Article Template Page

4. In the **Template Name** field, enter a name for the Embedded Article Template.
5. Select the **Upload a template** option.
6. In the **Template Type** field, specify the path of the **.html** Template file you created for Embedded Articles.

   -OR-
7. Click **Browse** to select the Template file from the Choose file window.
8. Click **Next.** The **Article Body Sections** page is displayed, with a list of the Normal, and Embedded Article bodies defined in the Article Template.

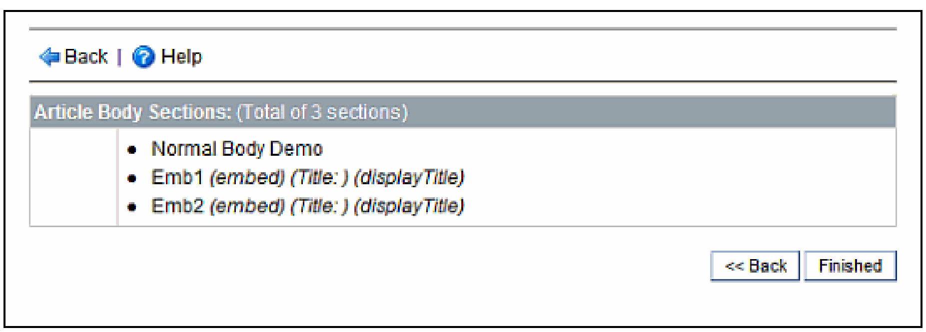


Figure 69 Article Body Sections

9. Click **Finished** to complete the Article Template upload process.

Creating a Parent Article Using an Embedded Article Template

To create an Article with Embedded Child Articles, you must first create an online Parent Article using the Embedded Article Template. The content of the Parent Article uses the Normal Article body style you specified in the Template.

To create a Parent Article using an Embedded Article Template, carry out the following steps:

1. In the navigation bar of Knowledge Spaces Admin Control Panel, click 

.

   The **New Article** page is displayed.

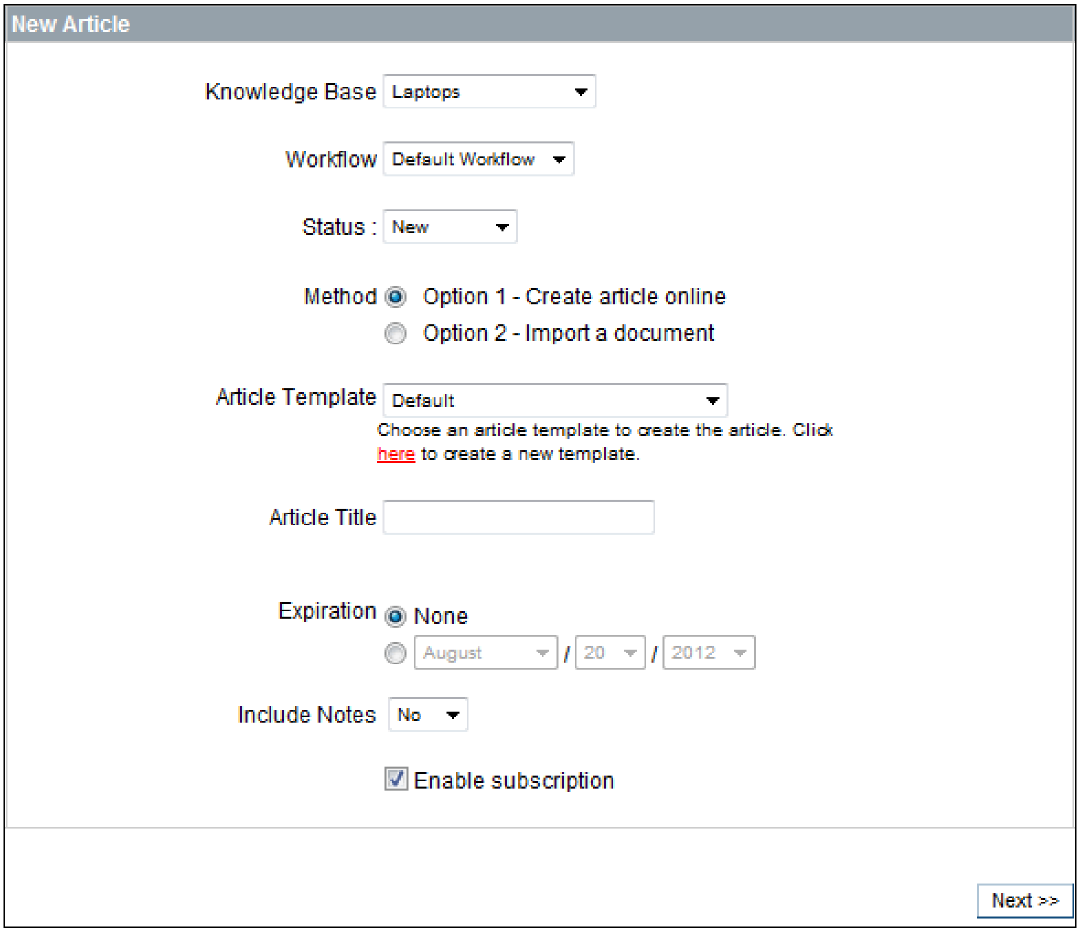


Figure 70 New Article Page

By default, Option 1 – Create article online is selected.

2. From the **Knowledge Base** list, select the Knowledge Base where you want the new Article to reside.
3. From the **Workflow** list, select the Workflow you want to assign to the Article. This list includes the Workflows associated with your User Profile.
4. From the **Status** list, select the Workflow step where you want to place the Article. The list includes the steps associated with your User Profile.
5. From the **Article Template** list, select the Embedded Article Template you created.
6. In the **Article Title** field, enter a name for the Parent Article.
7. From the **Expiration** options, enter a date of expiration for the Article. By default, the Expiration is set to **None**.
8. From the **Include Notes** list, select **Yes** to include a note for the Article.
9. Select the **Enable subscription** option if you want users to be able to subscribe to the Article.
10. Click **Next** to proceed with the Article creation.

    The **Article Editor** is displayed.

Figure 71 Article Editor Page

11. Click to open the editor control for an Article body. The **Article Editor** is displayed.Specify the Article content in the Normal text body field(s) provided.

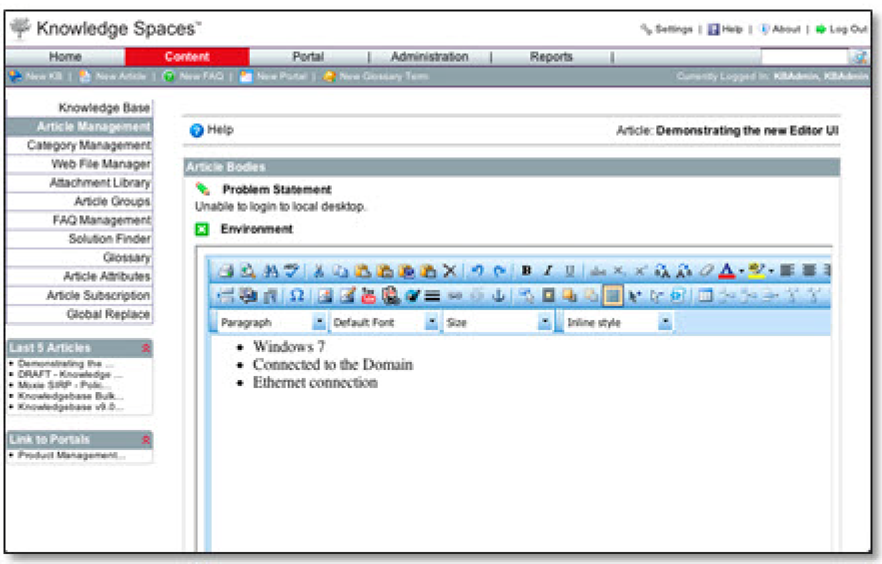


Figure 72 Article Editor Page

The Article Editor enables you to create and edit rich content.

You can choose from two editor modes:

- Normal: functions similarly to Word processing applications. and contains toolbars with a number of formatting options and controls.
- HTML:displays markedup content of the active Article body. Care must be taken in this mode because changes to HTML can significantly alter the appearance of the content. Users who are familar with HTML choose this mode to enhance the default markup created by the editor's formatting options.

12. Type, or paste the content in the field(s) provided. In the Normal mode, you can use the features available in the toolbar to style and format your Article.
    - Type, or paste the content in the field(s) provided. In the Normal mode, you can use the features available in the toolbar to format your Article

13. Click **Save** to save the Article. The **Versions** tab of the Article Information page is displayed, with the new Article.

    - OR -

    Click **Discard** to delete the Article without saving. A message box is displayed, prompting you to confirm the deletion of the incomplete Article. Click OK to confirm the deletion of the Article without saving.

Embedding Child Articles into a Parent Article

The **Parent and Embedded Articles** area on the Article Properties page of a Parent Article enables you to embed Child Articles into the Article. You can embed only Published Child Articles into a Parent Article.

> **Note:**
>
> The **Parent and Embedded Articles** area is displayed on the Article Properties page for a User only if the **Embedded Article** permission is granted for the User's Internal Access Profile.

To embed Child Articles into a Parent Article, carry out the following steps:

1. From the **Parent and Embedded Articles** area on the **Article Properties** page of the Parent Article, click  . The **Select Embedded Articles** page is displayed.

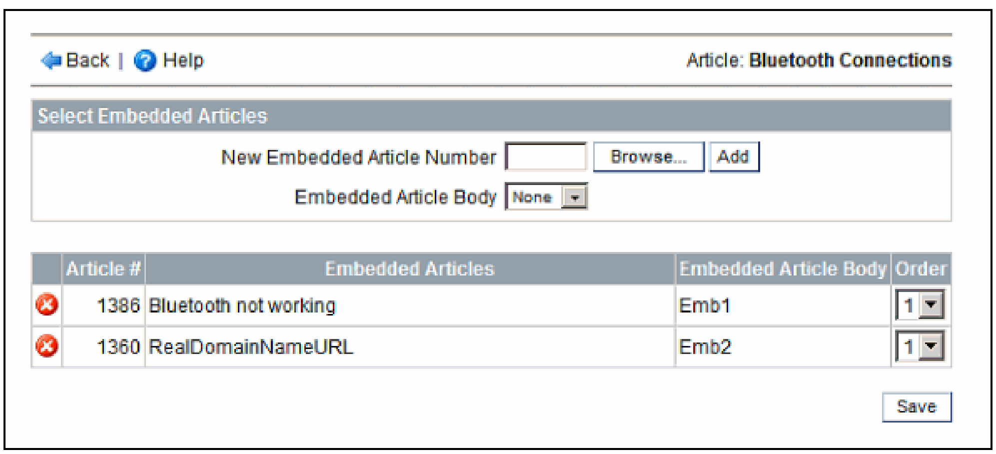


Figure 73 Select Embedded Articles Page

2. In the **New Embedded Article Number** field, enter the ID of the published Child Article you want to link.

   - OR -

   Click **Browse**, and select the Article you want to link.

> **Note:**
>
> The Search by Title window that is displayed when you click the Browse button lists only the Published Articles. Additionally, the Parent Articles in the list will be unavailable for selection.

3. The Article bodies in the Embedded Article Template associated with the **embed** tag are listed in the **Embedded Article Body** list.
4. Select the Article body to be associated with the Child Article you selected in the **New Embedded Article Number** field.
5. Click **Add**. The selected Article is added to the list of Embedded Articles.
6. Repeat step 2 through 5 for all the Articles you want to embed in the Parent Article.
7. From the **Order** list, select the order in which the Child Articles must be displayed in the Parent Article.
8. Click **Save**. The Embedded Child Articles are listed in the **Embedded Article** area on the Article Properties page of the Parent Article.

> **Note:**
>
> - To remove an Embedded Article from the list of Embedded Articles, in the **Embedded Article** area, click adjacent to the Article. A message box is displayed, prompting you to confirm the removal of the Article. Click OK. The Article is removed from the Embedded Articles list.
> - Only published HTML Articles can be embedded into a Parent Article.
> - You cannot change the Title, and Expiration of an Embedded Child Article.
> - You cannot delete an Embedded Child Article from the Article Management page without removing its association with the Parent Articles. For information on removing an Article's association with the Parent Articles, see **"Modifying the Parent-Child Relationship of Articles" on page 91**.
> - On the **Knowledge Base and Article Group Access** page, you can enable the **Article Template Body Security** option to restrict specific Embedded Child Articles within the Parent Article from being displayed on a Portal.
> - The **Embedded Articles** feature supports only one level of embedding. You cannot set a Parent Article as the Embedded Child Article of another Article

Modifying the Parent-Child Relationship of Articles

If you want to remove an embedded Child Article from multiple Parent Articles, you can remove the association easily by changing the Workflow status of the Child Article, without going through the tedium of removing each association.

To remove the association of a Child Article with multiple Parent Articles, carry out the following steps:

1. From the **Versions** page of the Child Article, click the file name of the Article. The **Article Version Status** page is displayed.

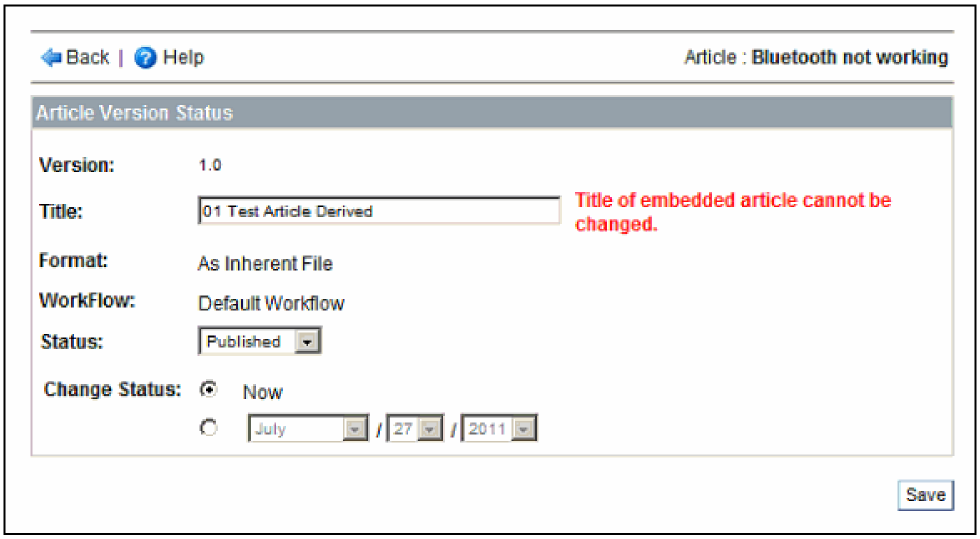


Figure 74 Article Version Status Page

2. From the **Status l**ist, change the **Published** status to **New.** A message box is displayed prompting you to confirm the status change.

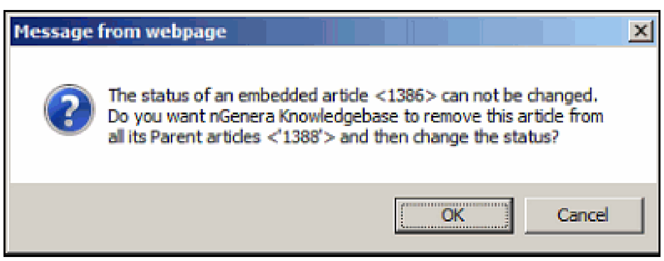


Figure 75 Status Change Confirmation Dialog Box

3. Click **OK**. The association of the Article with the Parent Articles is removed. You may now edit or publish the Article again.

Setting the Display Mode of an Embedded Article on the Portal

You can configure the display mode of the Embedded Articles for an External User on the Portal. To display an Embedded Article with the Child Articles in the expanded mode, you must select the Expand **Embedded Articles** option in the User's External Access Profile. This option is selected by default when you create an External Access Profile.

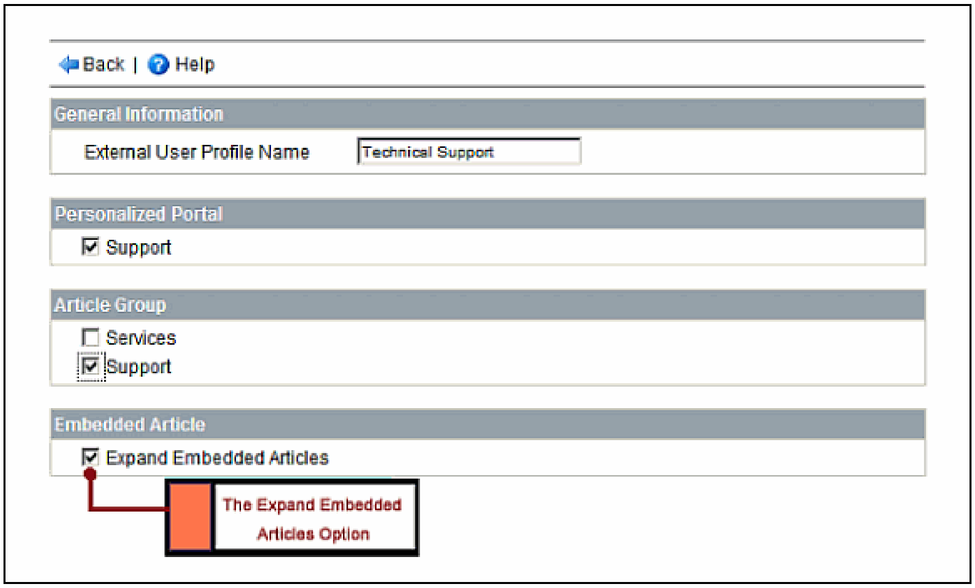


Figure 76 External Access Profile Page

To configure the display of an Embedded Article to an External User with the Child Articles in the collapsed form, carry out the following steps:

1. From the **Portal** page, click **External Access Profile**. The **External Access Profile** page is displayed.
2. Click  to the left of the **Profile** name, or click the **Profile** name. The **Access Profile** information page is displayed.
3. In the **Access** area, clear the selection of the **Expand Embedded Articles** option.
4. Click **Save** to update the settings.

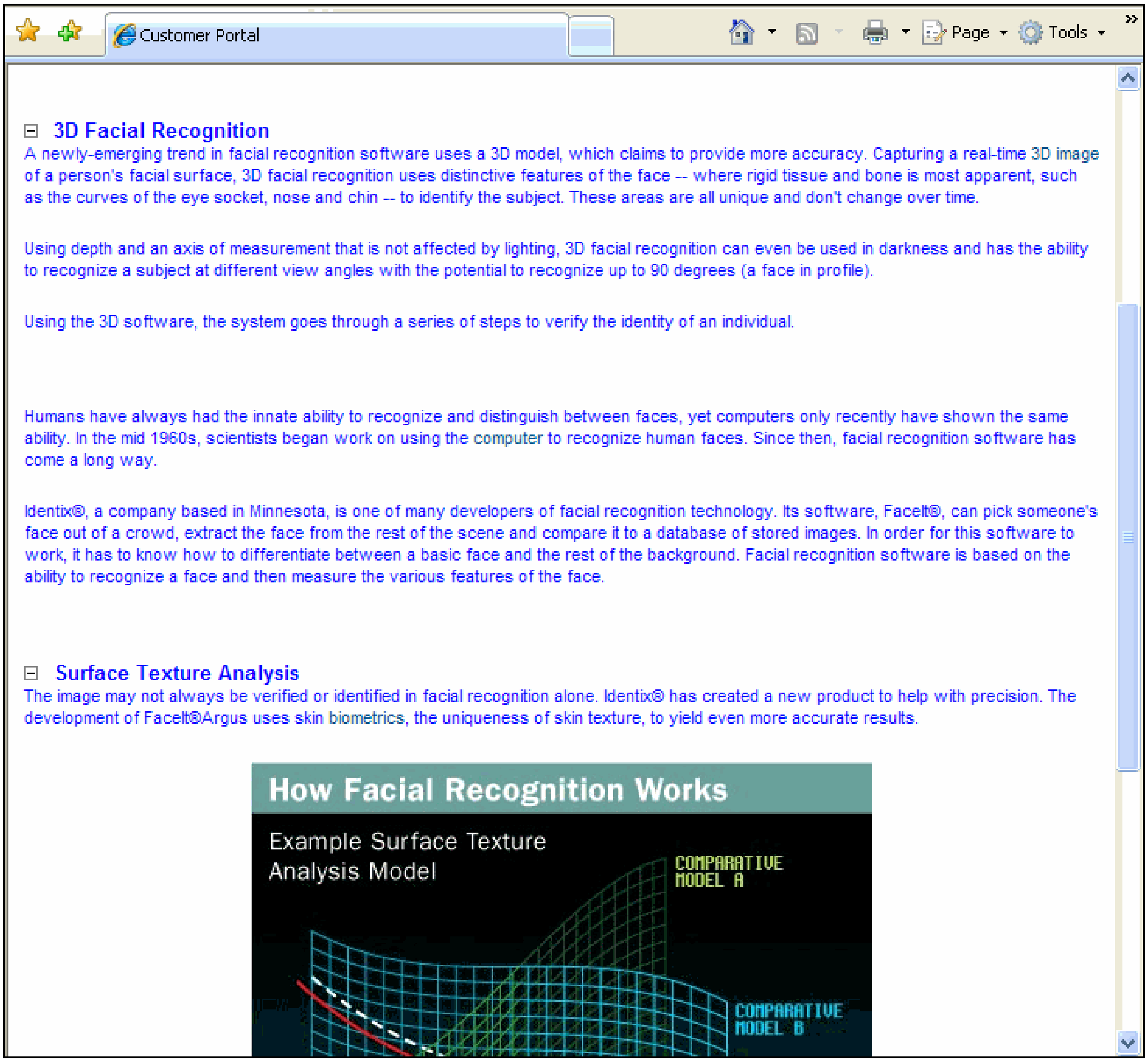


Figure 77 Child Articles in the Expanded Mode

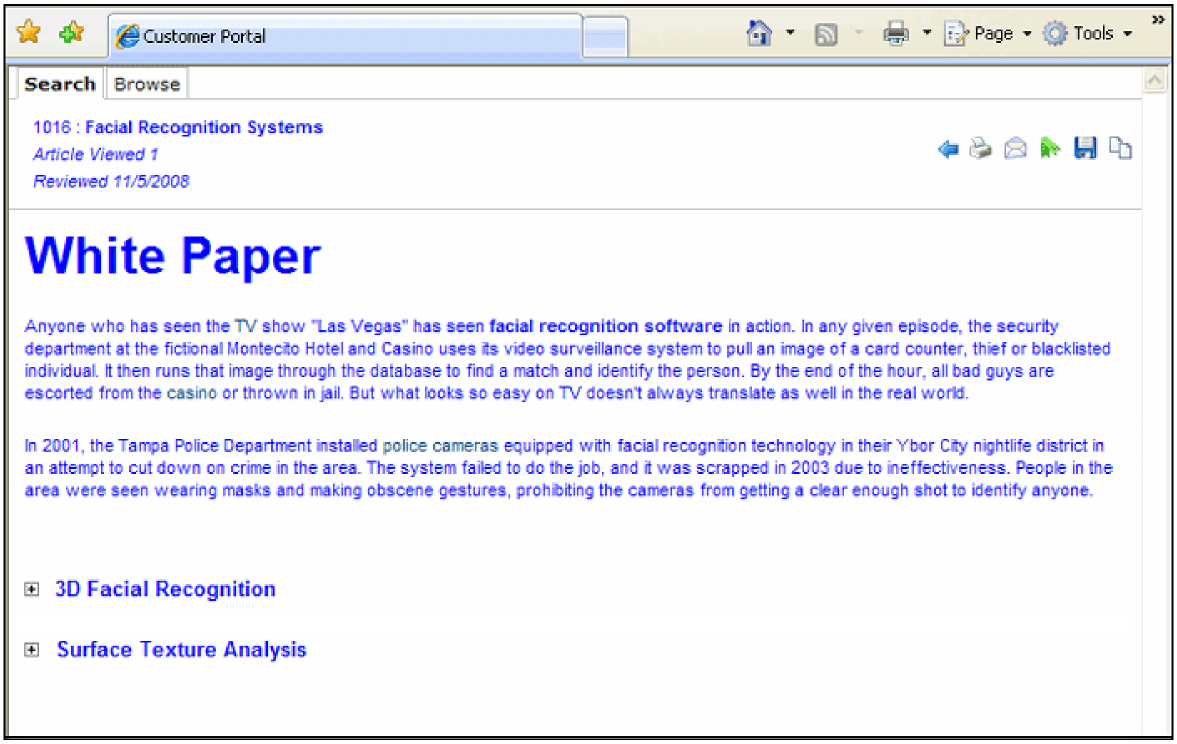


Figure 78 Child Articles in the Collapsed Mode

Versions Tab

The **Versions** tab enables you to maintain multiple versions of an Article. When you open an Article, the Article Information page opens, displaying the **Versions** tab. From the **Versions** tab, you can carry out the following operations:

- Create new versions of an Article
- Edit the Properties of an Article Version
- Download a version of the Article
- View a version of the Article
- Delete a version of the Article

The following figure shows the Version tab in an Article Information page:

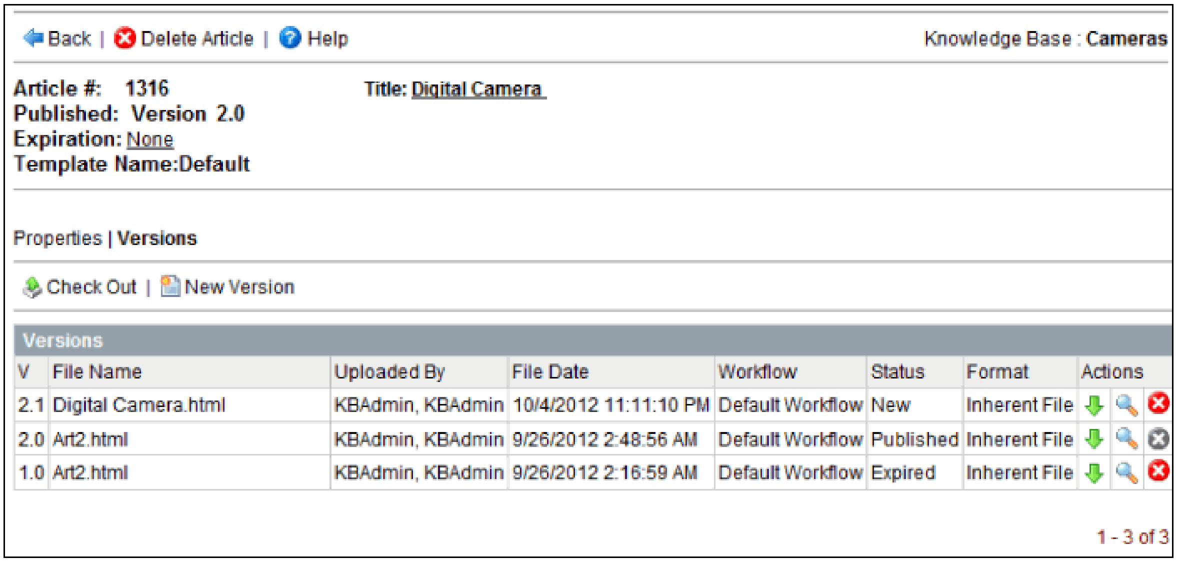


Figure 79 Versions Tab in the Article Information Page

Creating a New Version of the Article

You can create a new version of the Article in one of the following ways:

Option 1: Create article online

This option enables you to create a new version of the Article using an existing Article template, and the Article Editor.

Option 2: Create article online based on an existing version

This option enables you to create a new version of the Article by editing the content of an existing Article version.

Option 3: Import a document

This option enables you to upload a file to use as the new version of the Article.

> **Note:**
>
> You can create a new version of the Article only if you have the **Create New Version Permission.**
>
> You can maintain an approved **Published** version on your Portal until the approval process for a newer version is completed.

Creating a New Article Version Using Option 1

To create a new Article version using **Option**1, you must be granted the **Option 1: Online New Content** Create New Version permission in the Internal Access Profile page.

1. In the **Versions** tab, click 

. The Select the method of creating your article page is displayed.

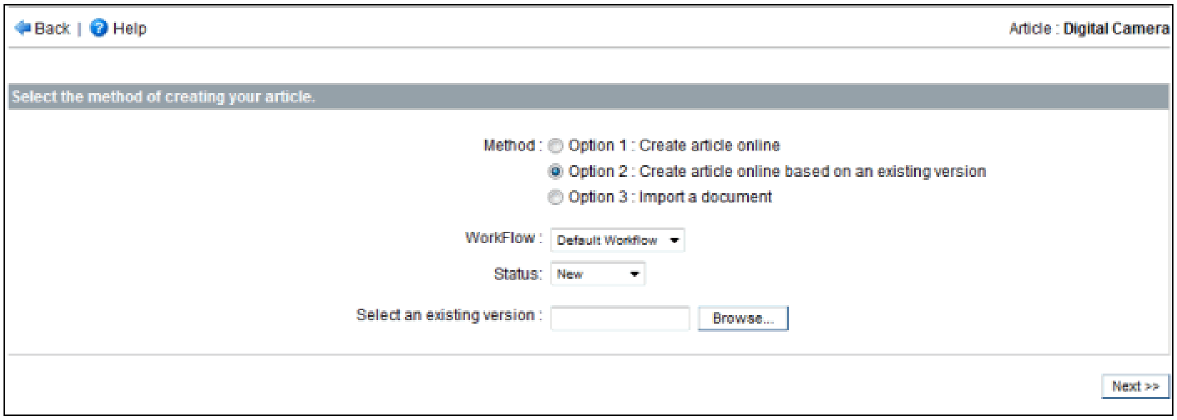


Figure 80 Select the Method of Creating your Article Page

2. From the **Method** option, select **Option 1: Create article online**.

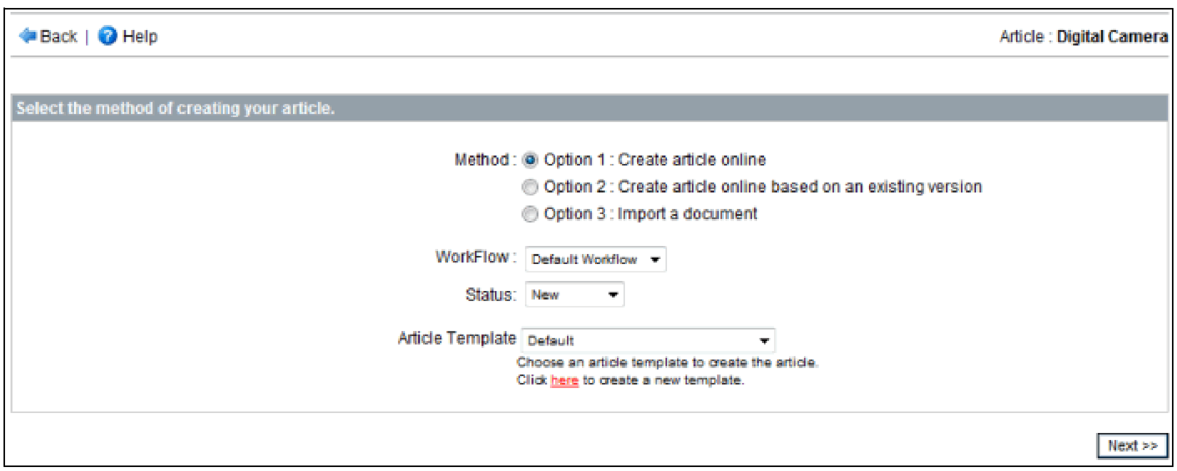
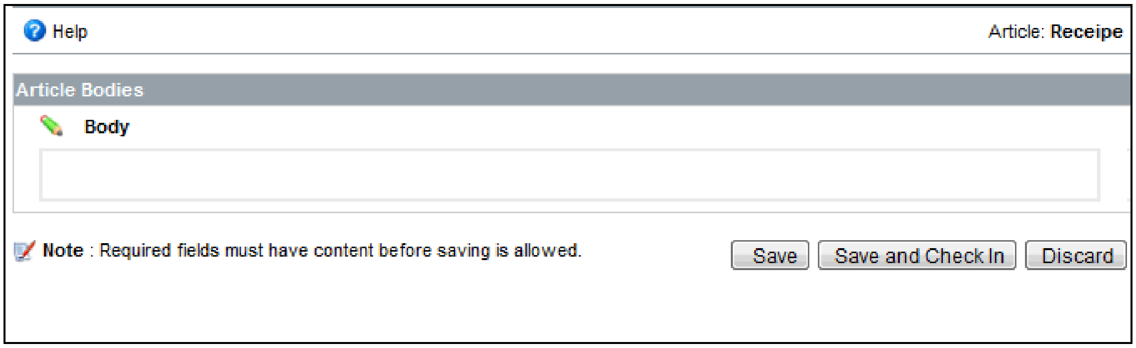


Figure 81 Select the Method of Creating your Article Page

3. From the Article Template list, select the Article template you want to use to create the Article version. Article Templates are used to create a format for an Article. If you have not created any Article templates, you can use the default template that is available.
4. From the Workflow list, select the Workflow you want to assign to the Article version. This list includes the Workflows that your Administrator has granted you access. The Workflow associated with a version enables the version to progress through a series of Workflow steps defined for the Workflow.
5. From the **Status** list, select the Workflow step where you want to place the Article version. The statuses defined for the selected Workflow are included in this list. The list includes the steps that your Administrator has granted you access.
6. Click **Next.** The **Article Editor** page is displayed.



7. Click . . The **Article Editor** is displayed.

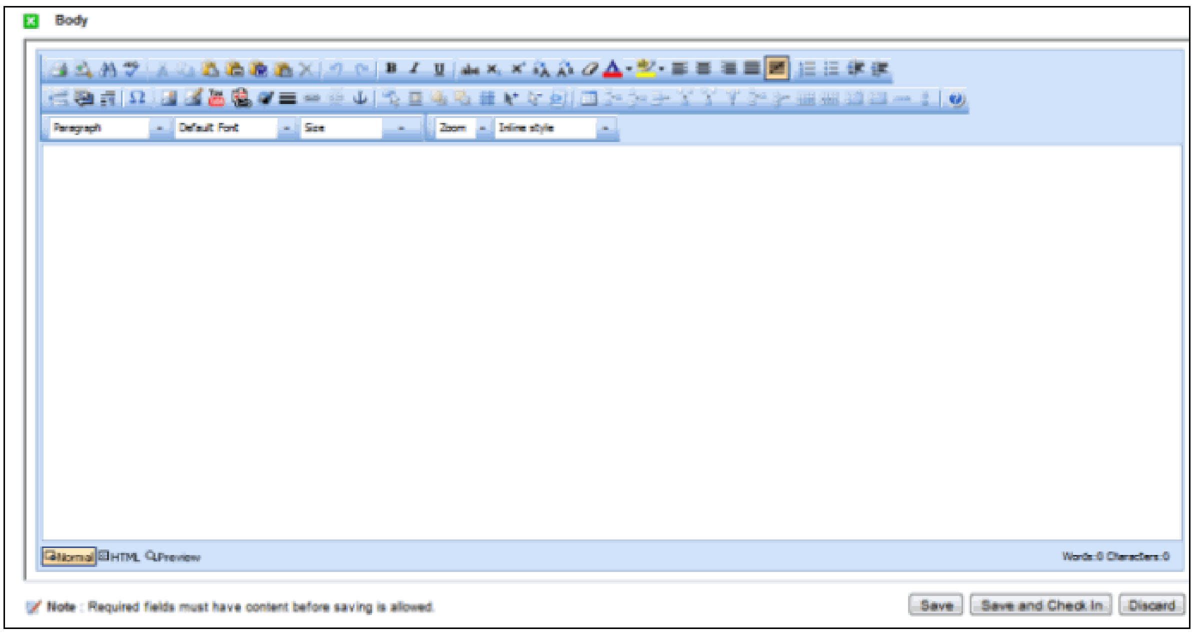


Figure 82 Article Editor

The Article Editor enables you to create, and edit HTML Articles online in Knowledge Spaces™ Admin Control Panel.

You can choose from two editor modes:

- Normal: functions similarly to Word processing applications. and contains toolbars with a number of formatting options and controls.
- HTML: displays HTML markedup content of the active Article body. Care must be taken in this mode because changes to HTML can significantly alter the appearance of the content. Users who are familiar with HTML choose this mode to enhance the default markup created by the editor's formatting options.
    - The number of Text Bodies, font, and other properties of the Article version are determined by the Article template selected to create the Article version.

8. Type, or paste the content in the field(s) provided. In the Normal mode, you can use the features available in the toolbar to format your Article.

9. Click **Save** to save the Article version. The Versions tab of the Article Information page is displayed listing the new version of the Article.

   - OR -

10. Click **Save and Check In** to save and check in the Article into the Portal
11. Click **Discard** to delete the Article version without saving. A message box is displayed prompting you to confirm the deletion of the incomplete version. Click **OK** to confirm the deletion of the Article version without saving.

Creating a New Article Version Using Option 2

To create a new Article version using Option2, you must be granted the **Option 2: Online Existing Content** Create New Version permission in the Internal Access Profile page.

1. In the **Versions** tab, click 

. The Select the method of creating your article page is displayed.

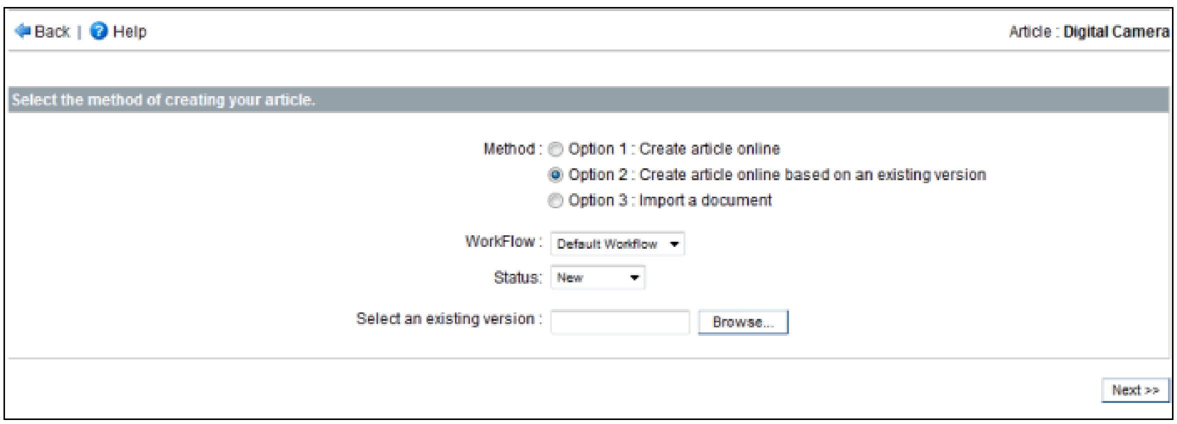


Figure 83 Select the Method of Creating your Article Page

2. By default, Option 2 : Create article online based on an existing version is selected.
3. In the Select an existing version field, specify the number of the Article version from which you want to derive the new Article.

   - OR -

4. Click **Browse**, and select the required Article version.
5. From the **Workflow** list, select the Workflow you want to assign to the Article version. This list includes the Workflows that your Administrator has granted you access. The Workflow associated with a version enables the version to progress through a series of Workflow steps defined for the Workflow.
6. From the **Status** list, select the Workflow step where you want to place the Article version. The statuses defined for the selected Workflow are included in this list. The list includes the steps that your Administrator has granted you access.
7. Click **Next** to proceed with Article creation. The Article Bodies page is displayed.
8. Modify the content

   click **Save**.The new version of the Article is created, and is listed on the Versions tab.

   - OR -

   Click **Save and Check In** to save and check in the Article into the Portal

- OR -

Click **Discard** to delete the Article version without saving. A message box is displayed prompting you to confirm the deletion of the incomplete version. Click OK to confirm the deletion of the Article version without saving.

Creating a New Article Version Using Option 3

To create a new Article version using Option3, you must be granted the Option 3: Upload Create New Version permission in the Internal Access Profile page.

1. In the **Versions** tab, click New Version. The Select the method of creating your article page is displayed.

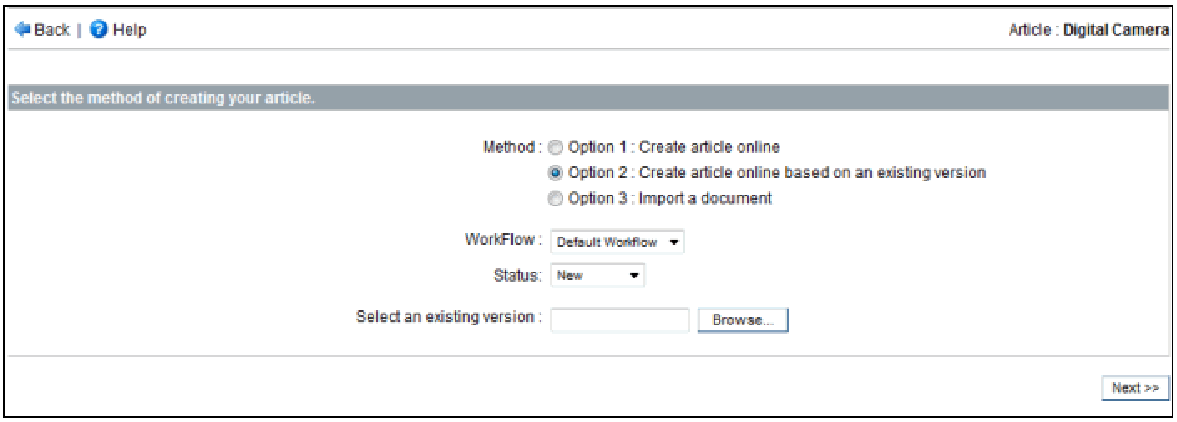


Figure 84 Select the Method of Creating your Article Page

2. From the **Method** option, select **Option 3 : Import a documen**t.

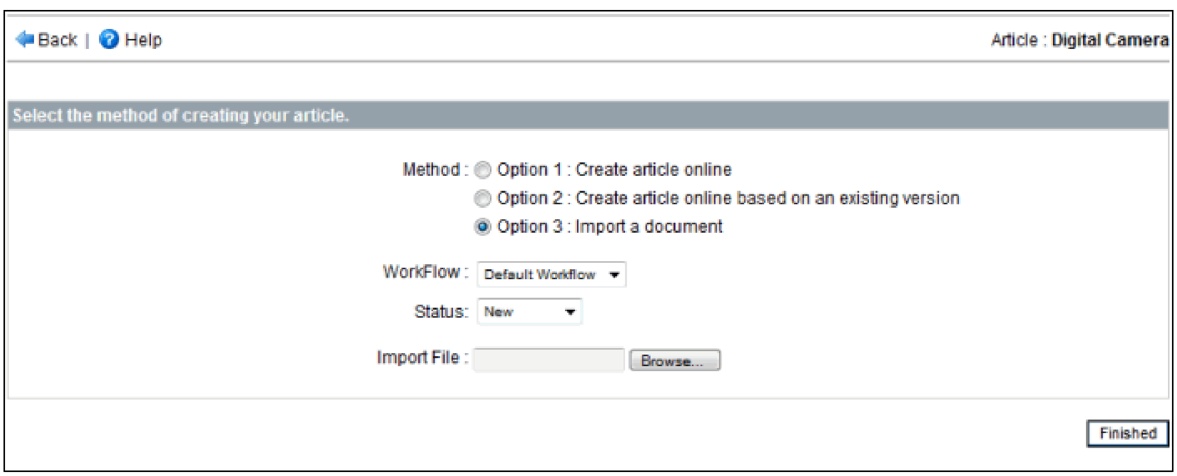


Figure 85 Select the Method of Creating your Article Page

3. Click **Browse** and select the Article you want to upload.
4. From the **Workflow** list, select the Workflow you want to assign to the Article version. This list includes the Workflows that your Administrator has granted you access. The Workflow associated with a version enables the version to progress through a series of Workflow steps defined for the Workflow.

5. From the **Status** list, select the Workflow step where you want to place the Article version. The statuses defined for the selected Workflow are included in this list. The list includes the steps that your Administrator has granted you access.
6. Click **Finished** to upload the file as the new version of the Article. The Article is listed on the Versions tab.

Article Check Out/Check In

When you create a new Article Version, the Article is created and listed on the Versions tab of the Article Information page. The Article will be in the checked out state, and you must check in the Article to enable other Internal Users to edit the **Article Version**. Click 

on the **Versions** tab to check in all the versions of an Article. After you check in the Article, the 

button is displayed on the Versions tab.

The check out status icon  next to an Article in the Article Management page indicates that an Internal User has checked out the Article for editing, or review.

Article Versioning

The version number for an Article consists of two parts, the major version number and the minor version number. For example, in an Article with version number 1.5, 1 is the major version number and 5 is the minor version number.

The version number for an Article is generated based on the workflow step to which the Article is assigned. For example, if you create an Article by assigning it to a **non- published** workflow step, the Article is assigned the 0.1 version number where the major version number is **0** and the minor version number is **1**. If you create an Article by assigning it to the Published workflow step, the Article is assigned the **1.0** version number, where the major version number is **1,** and the minor version number is 0.

Each time you create a new version of an Article, and assign to a non-published workflow step, only the minor version number is incremented. However, when you create a new version of an Article and assign to the **Published** workflow step, the major version number increments by one and the minor version number of the Article is **0.**

All published Articles will have a minor version number of 0. The new versioning process enables Administrators to track the versions of an Article that have been published.

> **Note:**
>
> When you move an existing version of an Article from a non published workflow step to published workflow step, a new version of the Article is created with a new version number where the major version number is incriminated by one from the last major version number of the Article, and the minor version number is 0. This version of the Article is automatically published on the Portal, and the previously published version of the Article is expired.

The following figure illustrates the Versions tab on the Article Information page of an Article:

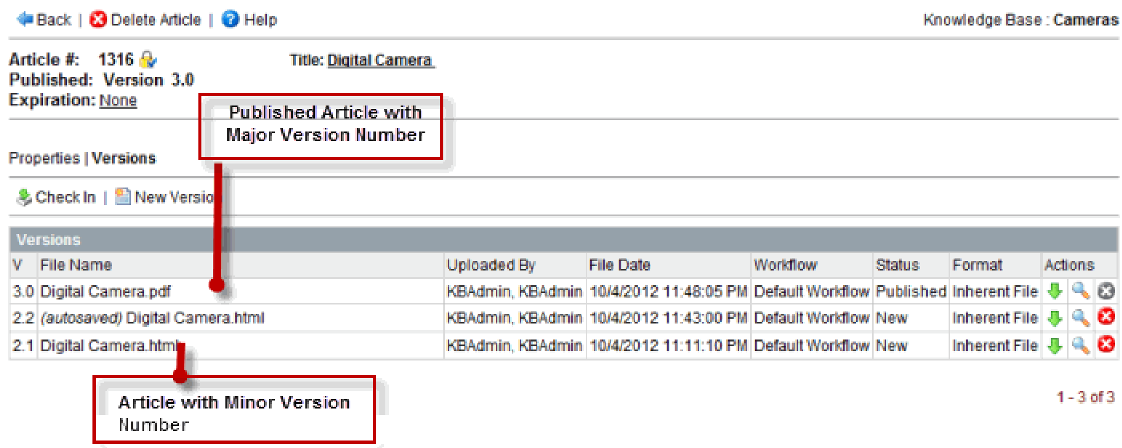


Figure 86 Article Information Page - Versions Tab

Editing Properties of an Article Version

You can edit the following properties associated with the version of an Article:

- Title
- Format
- Workflow - Status

Steps to Edit the Properties

1. In the **Versions** tab, click the File Name of the Article. The **Article Version Status** page is displayed.

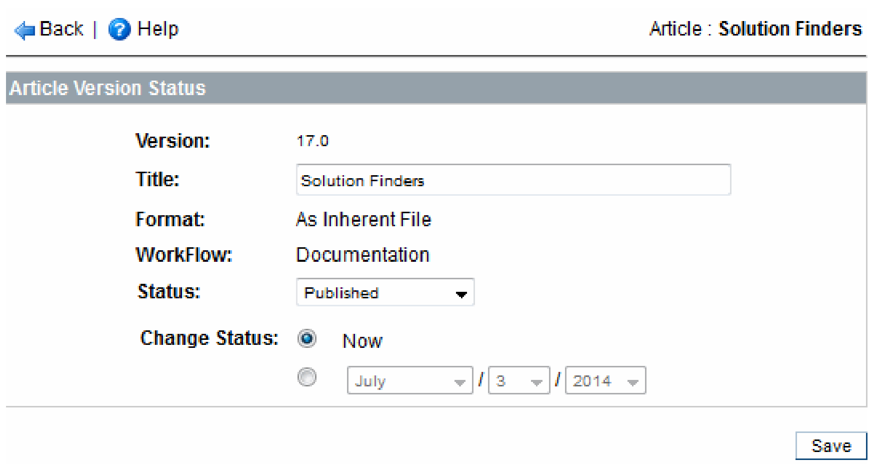


Figure 87 Article Version Status Page - for all file formats formats

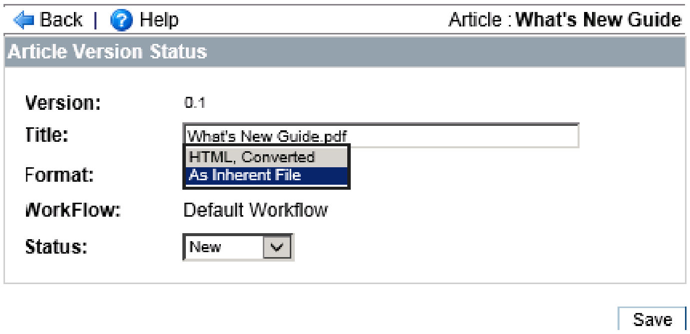


Figure 88 Article Version Status Page - PDF format

2. In the **Title** field, enter a new Title for the Article.
3. The **Format** field indicates the default display format for the article - “As inherent file”. To change this click the drop-down menu and select “HTML Converted”

> **Note:**
>
> - The option “HTML Converted” works only for Adobe portable document format (.pdf), files. For all other file formats, the default display format is “As Inherent File”. This preserves the format for display in the native application.
> - The PDF-to-HTML conversion module should be installed with Moxie Knowledge Spaces application to convert a PDF Article into the HTML format.

4. From the **Status** list, select the **Article status** you want to assign to the Article. The statuses defined for the Workflow associated with the Article are listed here.

> **Note:**
>
> The Workflow steps to which an Internal User can move an Article is based on the permissions assigned to the User through their External Access Profile.

5. From the **Change Status** field, specify a date on which you want to change the status assigned to the Article. By default, the option is set to **Now**.
6. Click **Save**. The Property modifications to the Article are saved.

Deleting a Version of the Article

In the **Versions** tab, click adjacent to the version of the Article. A confirmation message is displayed.

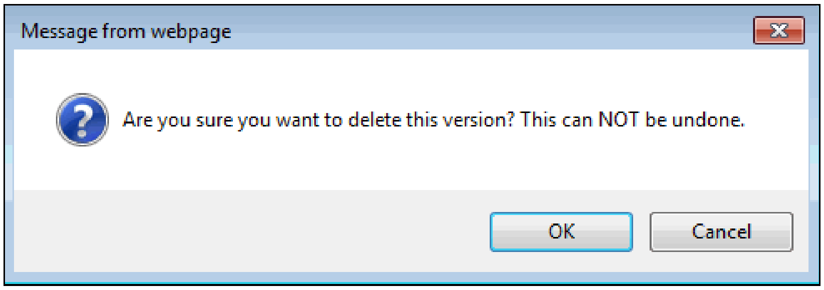
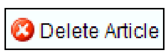


Figure 89 Delete Articles Confirmation Dialog Box

7. Click **OK**. The selected version of the Article is deleted from the Knowledge Base.

> **Note:**
>
> You cannot delete a Published version of an Article.
>
> To delete all the versions of an Article, select the Article on the Article Management page, and click . 
>

Downloading a Version of the Article

You can save a version of the Article on your computer. To do so, carry out the following steps:

1. In the **Versions** tab, click  adjacent to the version of the Article you want to download. The File Download dialog box is displayed.

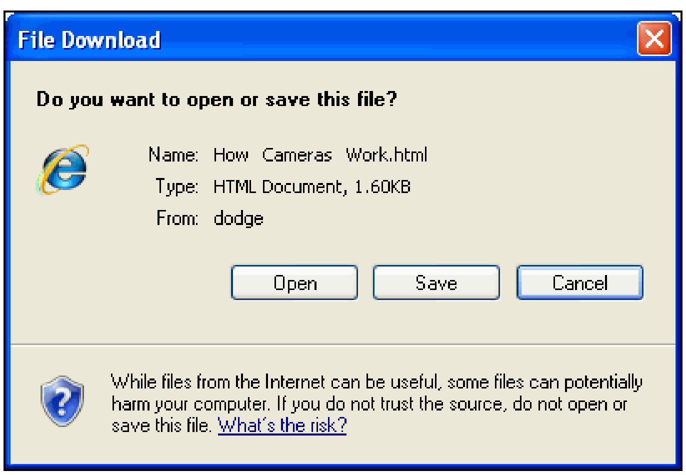


Figure 90 File Download Dialog Box

2. Click **Save**. The **Save As** dialog box is displayed.

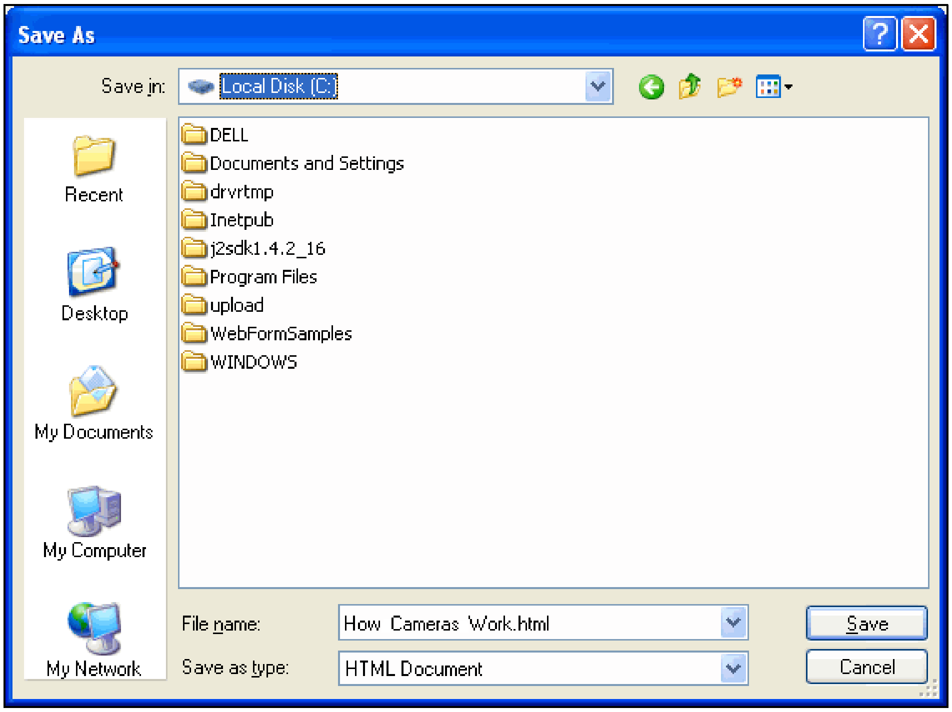


Figure 91 Save As Dialog Box

3. Specify the location where you want to download the file.
4. Click **Save.** The Article is downloaded to the specified location on your computer.

Viewing an Article

In the **Versions** tab, click adjacent to the version of the Article you want to view. The content of the Article is displayed in a new window.

Categories

This section provides detailed information about Managing Categories in Knowledge Spaces™ Admin Control Panel.

About Categories

The **Category Management** section of the **Content** tab provides the tools for Category creation, management, and organization.You can also manage the order of the categories and sub categories here.

Categories are collections of Articles or sub Categories, and are used to organize the Articles and information in your Knowledge Bases.

In Knowledge Spaces™ Admin Control Panel, Categories are represented as manila folder icons . From the **Category** section, you can create new categories, edit existing categories, and delete categories.

Using Categories

To work with **Categories**, select **Category Management** from the **Content** page. On the left of the Category main page is a list of existing Knowledge Bases .To expand the Knowledge Base, click the Knowledge Base icon or the Knowledge Base name. You see the existing Categories located within the Knowledge Base. To open the Category, click the Category icon, or click the **Category Name**.

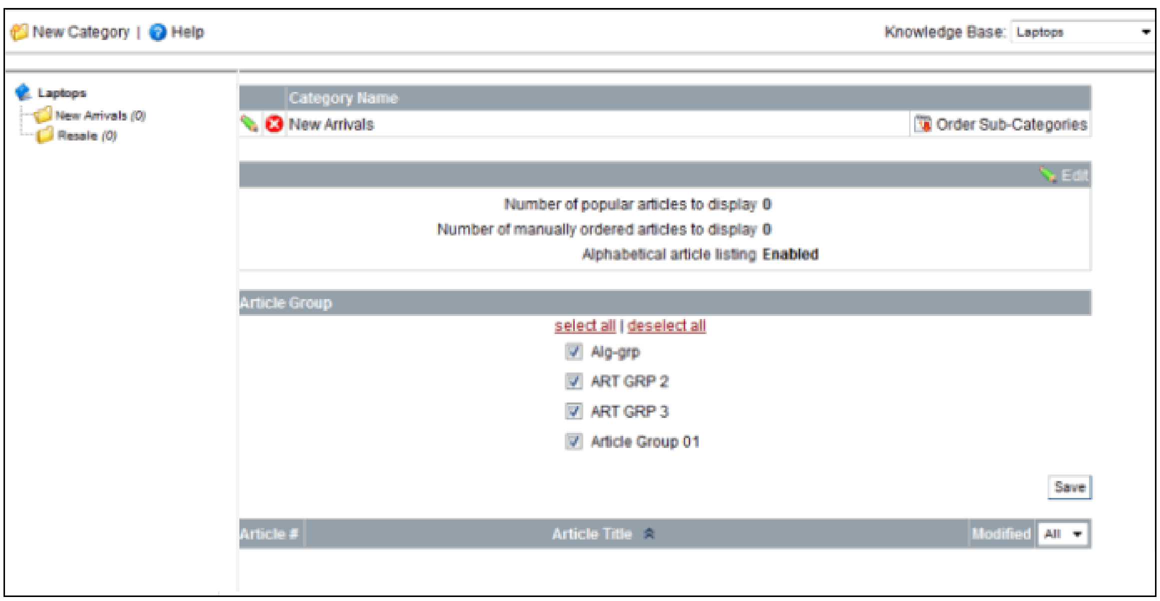


Figure 92 Category Management Page

Example:

Category Examples

E-mail - an unexpanded Knowledge Base.

Computer - an expanded Knowledge Base

Apple - a Category in the Computer Knowledge Base

PC - an expanded Category in the Computer Knowledge Base

Pentium - a sub Category of the PC Category

Category Contents

When you expand a Category in the directory structure, you see the contents of the Category in the main frame of the Category Management page. Any subcategories under the Category are displayed in the directory structure.

There are four sections of the main frame of the Category page:

- Category Name
- Article Display Properties
- Article Group Permissions
- Article Listing

To change the Category name, click to the left of the Category name. The Edit Category window is displayed, and you can change the Category name. To delete a Category click to the left of the Category name, and the Category is deleted.

Note:

If you delete a Category, the Articles in that Category are not deleted and remain in the Knowledge Base.

Below the **Category Name** section are the display properties for the Category that enable you to configure how Articles appear to your end users when they drill down through the categories.

The third section is **Article Groups**. When enabled, the selection of Article Groups control whether or not your External Users can see a Category in an Article Group enabled Portal.

Below the Article Group section is a list of all the Articles that reside within that Category. The Articles are listed alphabetically by title. You can also list the Articles by Article ID or by Date Modified, by clicking on the column headings.

To the right of the **Date Modified** column is the Workflow step selection list. This list enables you to sort the Articles within this Category by Workflow Step. To see the Articles that are in a specific Workflow step, select the Workflow step from the list. All the Articles that belong to the selected Workflow step are listed by default.

The Article titles are links. You have the option of opening and editing an Article from this area. Click on an Article title, the Article Properties page is displayed, and you can edit the Article. You can also edit Articles from the Article Management section of Knowledge Spaces™.

Creating a New Category

You can create a new Category within a Knowledge Base, or as a sub Category of an existing Category within a Knowledge Base.

> **Note:**
>
> You must be granted the **Create New Category** permission to create a new Knowledge Base.

To Create a Category

1. In the left pane on the **Category Management** page, select a Knowledge Base in which you want to create a Category.
2. Click . The **New Category** window is displayed.

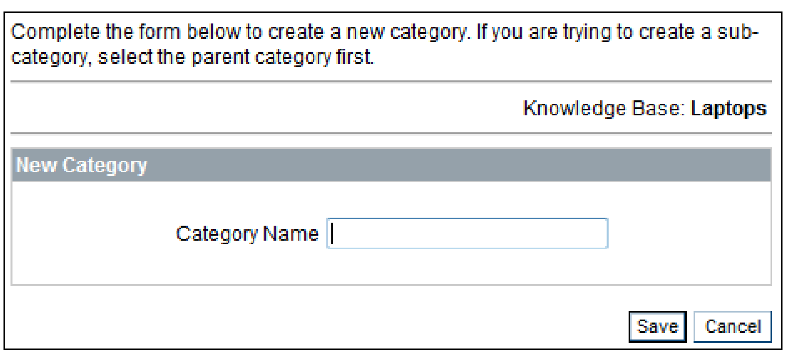


Figure 93 New Category Window

3. In the **Category Name** field, type a name for the Category.
4. Click **Save**. The new Category is displayed in the left pane on the Category Management Page.

> **Note:**
>
> A Category can be hidden by adding to an Article Group. For more information,see **"Article Groups" on page 58**.

Renaming a Category

> **Note:**
>
> You must be granted the **Edit Category** permission to modify the name of a Knowledge Base Category.

You can modify the name of a Knowledge Base Category.

To Rename a Category

1. In the left pane on the **Category Management** page, select a Knowledge Base which contains the Category you want to edit.
2. Select the Category you want to edit, and click  next to the Category Name.

   The **Edit Category** window is displayed.

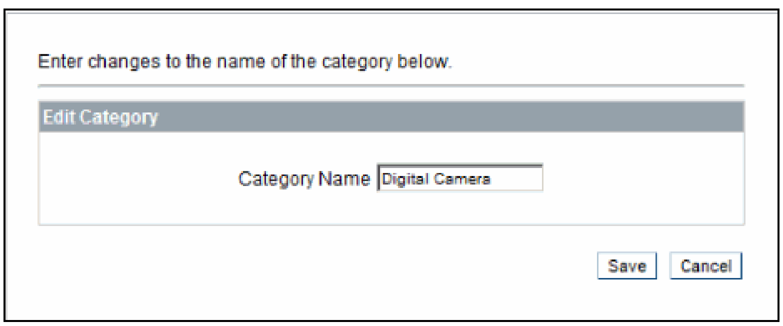


Figure 94 Edit Category Window

3. In the **Category Name** field, type the new name of the Category.
4. Click **Save**. The Category is displayed with the new name in the Category list.

Setting the Order of Categorie

You can set the order in which Categories and sub-Categories are displayed in the Knowledge base portal. By default, categories are displayed in the alphabetical order. When you access the Category Management page, you see the Knowledge Base that you have selected, as well as the main categories that appear within the Knowledge Base.

To Set the Order of the Categories

1. On the **Category Management** page, select the Knowledge Base, the Categories of which you want to order.
2. Click **Order Categories**. The **Order Categories** page is displayed.

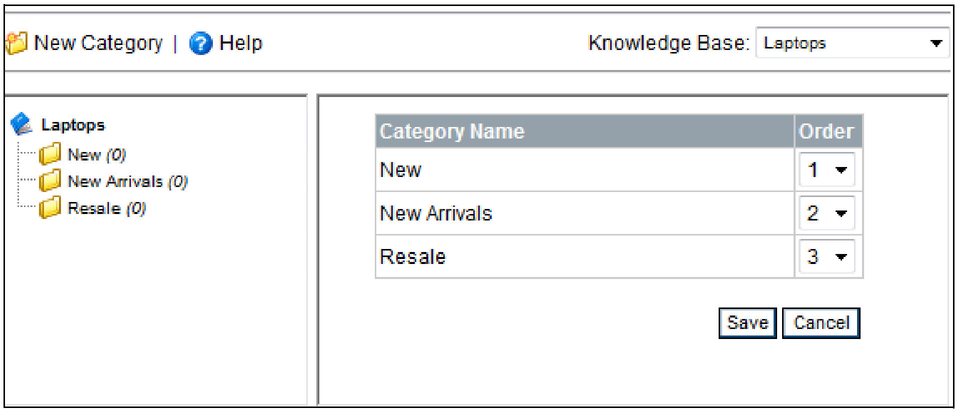


Figure 95 Order Categories Page

3. On the **Order Categories** page, use the boxes at the right of each Category name to choose the order you want.
4. Click **Save**. The new order of the categories is saved.

To Set a Sub Category Order

1. Select the sub-category level using the Category tree structure at the left of the Category Management Page.
2. Click the category icon or name within which you want to order the sub-categories.

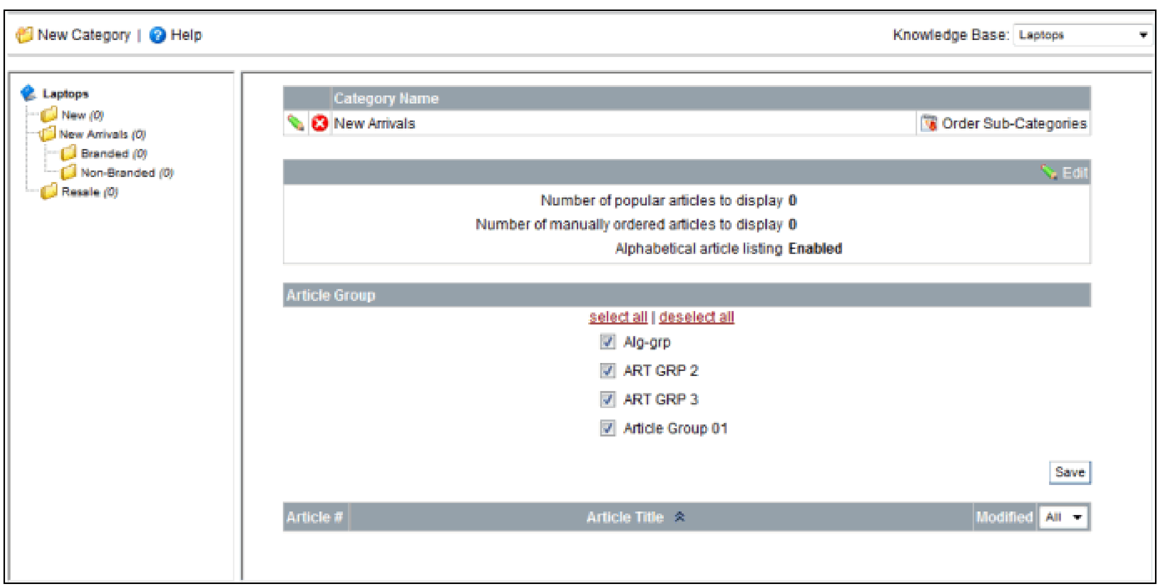


Figure 96 Order Sub-Categories Page

3. Click **Order Sub-Categories**. The list of sub-categories is displayed.

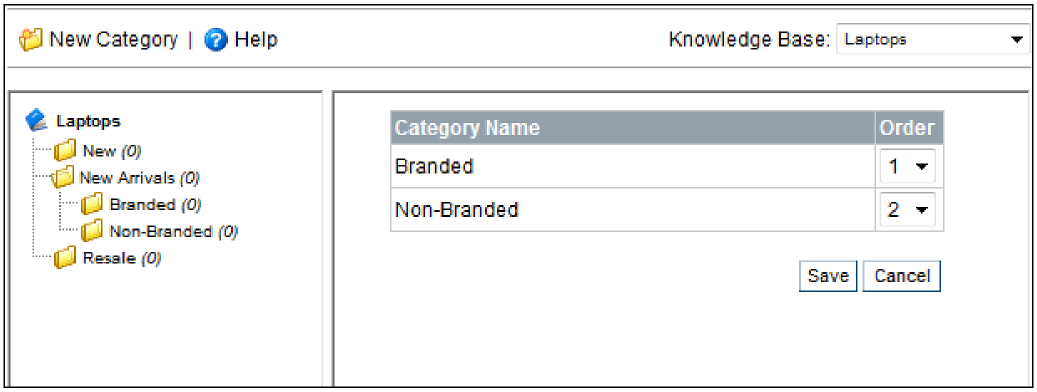


Figure 97 Sub Category List Page

4. On the **Sub-Category** list page, use the boxes at the right of each sub-Category name to choose the order you want.
5. Click **Save**. The new order of the Sub-Categories is saved.

Setting the Order of the Articles in a Category

When editing Articles in the Article Properties area, you can add your Articles to one or more Knowledge Base Categories. After you have added your Articles to the categories, you can order your Articles from the Category Management section in a number of ways. The Article order in the categories is displayed to the portal viewers with your selected ordering criteria.

To begin ordering your Articles, select the Category where you want to set the Article order. Select the Category by browsing the Category hierarchy to the left of the Category management section. Click the **Category** icon or the name of the Category you want to order your Articles. A page to order the Articles in the selected Category is displayed.

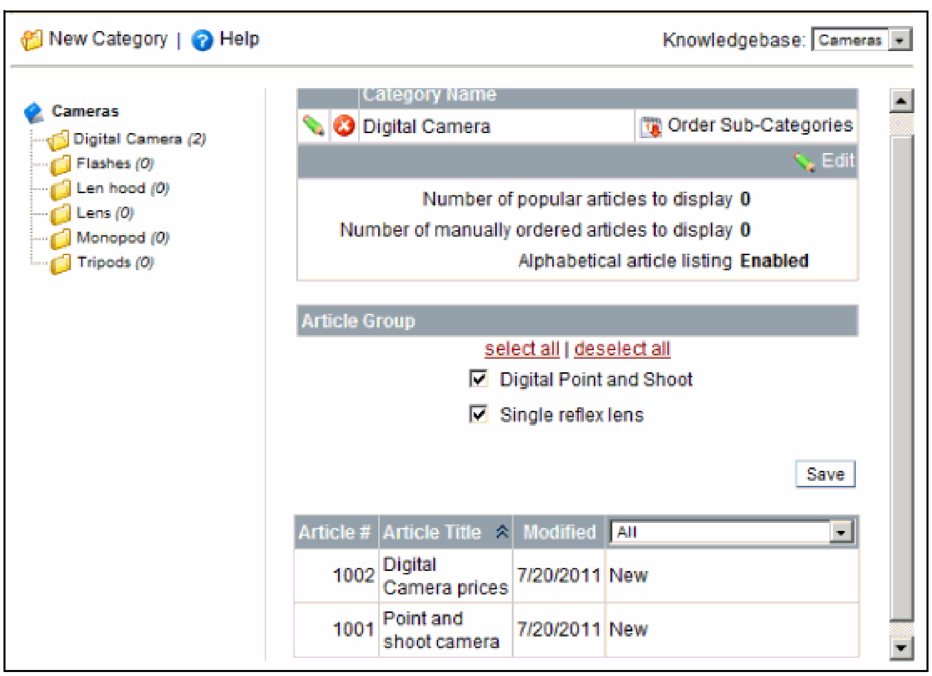


Figure 98 Page to Order the Articles in a Category

Article Ordering Options

You have three options for ordering your Articles within the categories:

- **Alphabetical** – Articles are ordered alphabetically by default. Choosing one or both of the options given below, the rest of the unordered Articles are shown in the alphabetical order.
- **Order of Popularity** – You have the option of ordering some or all Articles in the order of popularity or number of times viewed, from most to least popular.
- **Manual Order** – You have the option of ordering some or all of the Articles manually, and can determine the order these Articles are displayed in the Category.

You can have a combination of all the above options for each Category. For example, you can show a certain number of the most popular Articles, followed by some Articles that have been manually ordered, followed by the rest of the Articles in alphabetical order.

On the Category Management page, there are three headings below the Category name:

- **Number of popular articles to display** –Displays the number of most popular Articles you have chosen to display in the Category.
- **Number of manually ordered articles to display** – Displays the number of manually ordered Articles you have chosen to display in the Category.
- **Alphabetical article listing** – **Displays Enabled** or **Disabled.** If set to **Disabled**, it means the only method used for displaying this Category's Articles is by one of the means above.

To Create or Edit Article Order

At the upper right of the Category Management page, click . 

The **Article Order** page is displayed.

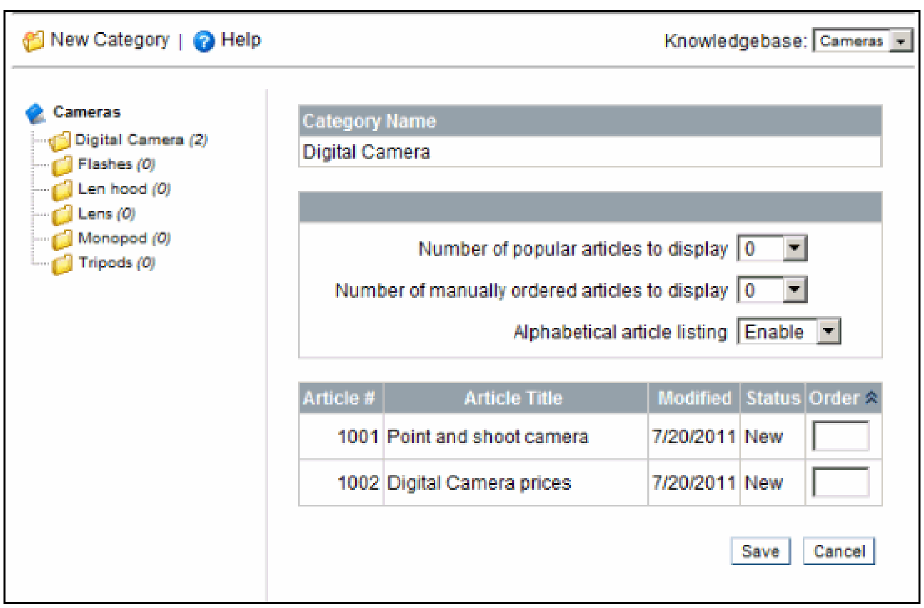


Figure 99 Article Order Page

6. There are three menus, as well as the list of Articles that have been added to the Category.
7. Using the menus, select the number of popular Articles and the number of manually ordered Articles to display in the Category.

- When the ordered Articles are displayed in the Portal, the most popular Articles are listed first, followed by the manually ordered Articles, followed by the rest of the Articles in alphabetical listing.
- Below the three menus is a list of your Articles that have been added to the Category.

8. On the right of each Article is a text field. In the text field, type a number that designates the order of your manually ordered Articles.

   Starting at number 1, type the numbers that designate the order you want. Articles that you do not include in the order appear within the alphabetical listing.

9. Click **Save**.

   - OR -

   To cancel the operation at any time, click **Cancel**.

Manager

This section introduces you to Manager in Knowledge Spaces™ Admin Control Panel.

About Web File Manager

The **Web File Manager** enables you to store common or frequently used images, or files, and provide a reference to them in the Knowledge Spaces Articles. To access the manager, select **Web File Manager** from the **Content** tab.

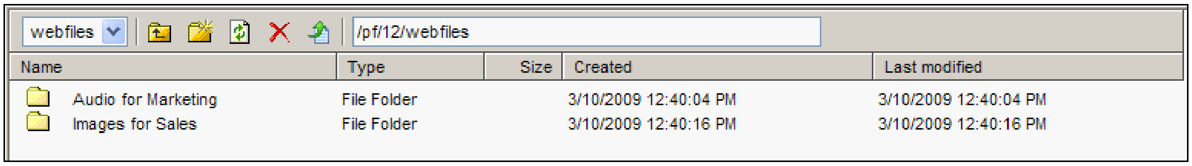


Figure 100 Web File Manager

When you upload an image or other file to the **Web File Manager**, the file is assigned a unique web address. This web address references and displays the file in certain locations. The three most common locations or uses for files that are stored in the Manager are:

Spaces by Moxie™ - Knowledge Spaces™ Customer Portal - When customizing the look and feel of your portal, you can use HTML scripting, and the address to embed files from the **Web File Manager**. The content appears in the various areas around your portal or portal snap-in, according to your customization.

Knowledge Spaces Articles - To reference an image or other articles in a Knowledge Base Article, use the URL for the file in the appropriate location in your Article. Typically, you do this when creating your Articles on-line, using one of the online editors.

Offline Article Templates - When customizing an Article Template, you have the option of using Style Sheets or custom graphics, which can be referenced from the **Web File Manager**.

> **Note:**
>
> Another way to embed an image file into an Article or area of the portal for customization is to upload the file to the Attachment Library and reference the file in your HTML or Article. Use the following syntax: [[image:10]] where 10 is the ID of the file in the attachment library. This method is more complicated, so it is recommended that you use the Manager for this purpose.

Using the Manager

You can perform the following operations using the manager:

Move up to a higher level folder.

Create a new folder to contain files.

Refresh the screen.

Delete a file or a folder.

Upload a new file.

You can create several folders, and sub-folders to organize your content. The folder webfiles is created by default.

Uploading files

You see a list of permitted file extensions when uploading files. If there is a file extension that you want to upload that is not included in the list, you can modify or add to the file types from the System Settings area of the Administration tab in KB Admin Control Panel.

You can upload files into the main folder, or its sub-folders. You can also upload the files into the files root folder without selecting a specific directory.

To Upload Files into a Folder

1. Double-click and open the folder to which you want to upload the file, and click . The New s page is displayed.

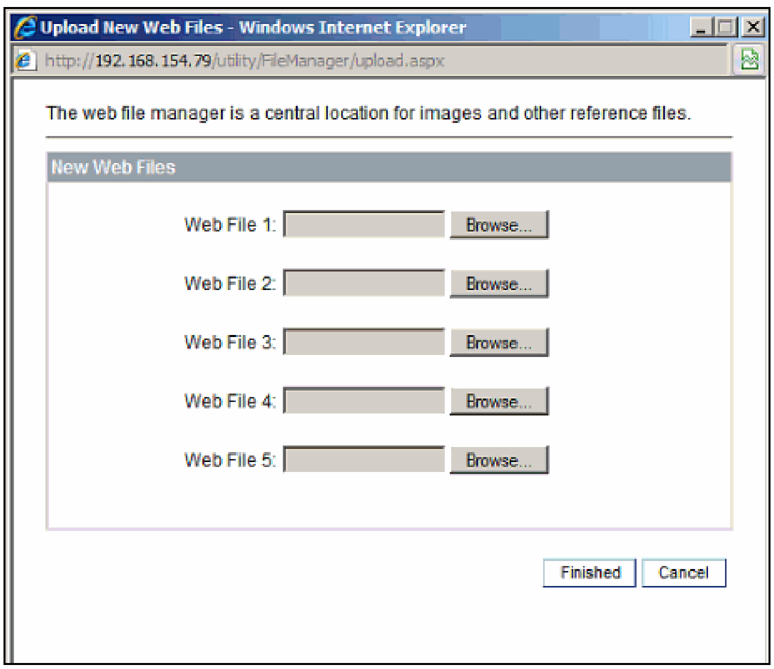


Figure 101 New s Page

2. In the **1** field, type the path of the file.

   - OR -

   Click **Browse** next to the 1 field to locate the file you want to upload, and click **Open**. The 1 field is updated with the path of the file.
3. Repeat Step 2 in the other fields to select more files to upload.
4. Click **Finished**. The files are uploaded into the selected folder.

> **Tip:**
>
> To download a file from the Manager, double click the file name.

Referencing Files from the Manager

After uploading a file into the Manager, you can refer to it in a Knowledge Spaces Article or area of the portal customization.

To Reference a File

1. In the Manager, locate the file you want to use.

   You can also reference a file that is not in a folder and appears in the main screen of the Manager.
2. The address is in the top field of the Manager. For example: /pf/12/webfiles.

   At the end of the address, add the name of your . For example: image.jpg. The complete string that you use to reference the in your portal customization areas or Articles looks like: /pf/12/webfiles/image.jpg.
3. To reference a located in a specific folder of the Manager, locate the folder by double-clicking the folders above it. Reference the file with the location that appears in the top field of the Manager, including the folder name(s):

   /pf/12/webfiles/folder1/folder2/image.jpg

   After you reference the in an Article or portal area, the file is embedded in that specific area using the web address for the file as it appears in the Manager.

Attachment Library

This section introduces you to Attachment Library in Knowledge Spaces™ Admin Control Panel.

About Attachment Library

The Attachment Library section of the Content tab provides the necessary interface to upload and manage files intended to serve as article attachments.

You can add video and audio files to an article to enhance the experience of Knowledge Base users. The attached file is available to the User, and can be downloaded, or viewed online. There is a wide range of file types that can be uploaded into the Attachment Library, consisting of image files, movies and sounds, and PDF files. The following table provides examples of the various file formats:

Image Files	.jpeg **.jpg** **.gif**
Movie Files:	.mov .qt .avi
Sound Files:	.wav
PDF Files:	.pdf

The following figure illustrates the **Attachment Library** main page.

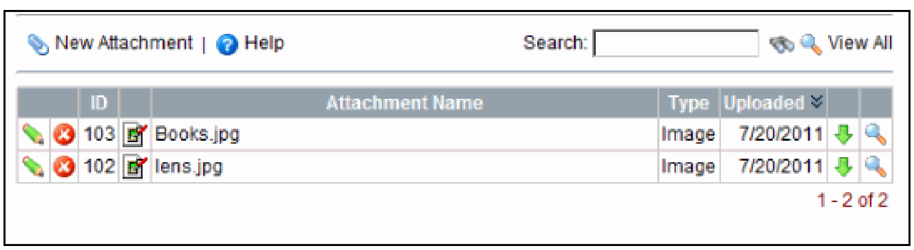


Figure 102 Attachment Library Main Page

Using the Attachment Library Tools

The **Attachment Library** page displays a list of all the attachments in the Attachment Library. The name, id, the file type of the attachment, and the date on which it was uploaded is displayed. Click the name of an Attachment to view its versions, and the article(s) to which it is attached. You add new versions of an attachment. By default, the Attachments are sorted alphabetically. You can also sort the files by file type, or by date of upload.

Note:

- You can upload only those file types that have been specified in the Systems Settings page of the Administration tab. If you want to upload a file of a different type, you must first add it in the Systems settings page.
- Knowledge Spaces™ Admin Control Panel installation on a Windows 2008R2 server allows you to upload a maximum file size of 500 MB. However, you can configure a lower file upload limit by modifying the value of the requestLimits maxAllowedContentLength tag in the web.config file located in the <System Drive>:\ Program Files\KnowledgeBase.Net\knowledgebase\applicationprogram\ui\http\ClientPortal path on the computer where Knowledge Spaces™ Admin Control Panel is installed.

Adding an Attachment

To Add Attachments to the Attachment Library, follow these steps:

1. From the **Content** tab, click view in the **Attachment Library** section. The **Attachment Library** page is displayed.
2. Click  or **New Attachment** link. The **New Attachment** page is displayed.

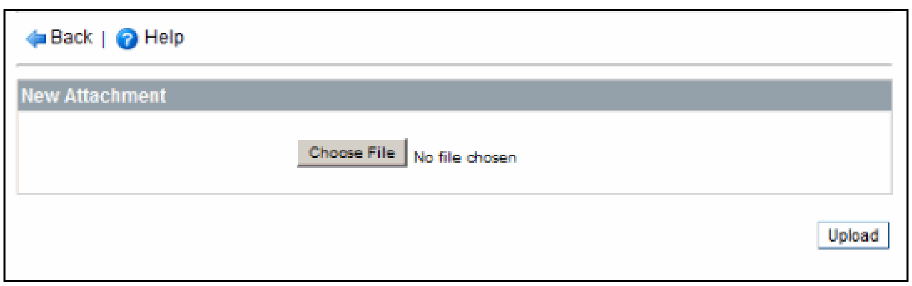


Figure 103 New Attachment Page

3. Type the path for the file in the field provided.
   - OR -
   Perform the following steps:
   i. To locate a file that you want to upload, select Choose. The Choose File dialog box is displayed.
   ii. Select the file from the appropriate location, and click Open. The path of the selected file is displayed in the New Attachment page.
4. Click **Upload**. The selected file is uploaded in the Attachment Library.

Attachment Images

On the Attachment Library main page, click the name of one of the attachments in image format. The Attachment versions page is displayed. On the Attachment versions page, click the name of the attachment, a popup window appears displaying the attachment image. The window automatically resizes the image for viewing convenience. If the file type is a video/sound/.pdf file, a Windows menu appears, prompting you to save the image to disk, or view it from the current source.

Editing an Attachment

You cannot edit an attachment directly. You must create a new version of the attachment, and then delete the older versions of the attachment.

> **Note:**
>
> The active version of an attachment cannot be deleted.

To Edit an Attachment

1. On the Attachment Library main page, click to the left of the attachment you want to edit.
   - OR -
   Click the name of the attachment. The **Attachment Versions** page is displayed.

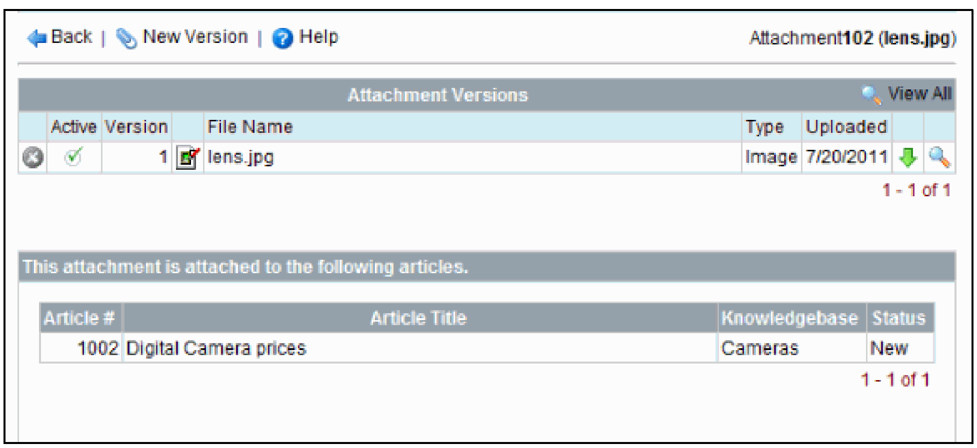


Figure 104 Attachment Library – Attachment Details Page

2. Click or the **New Version** link. The **New Attachment Version** page is displayed.

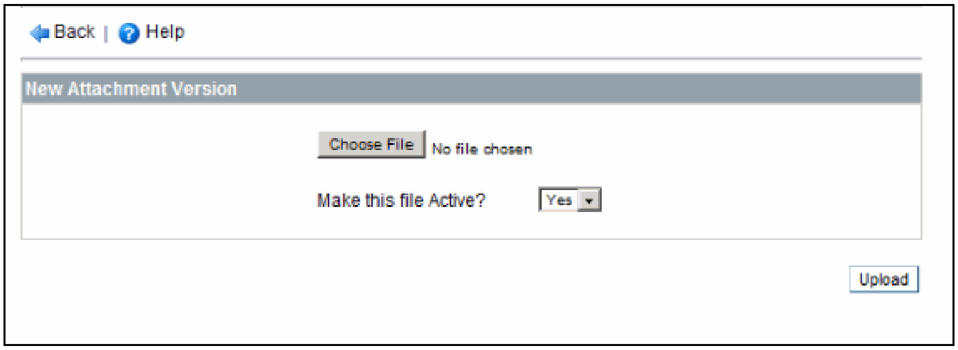


Figure 105 New Attachment Version Page

3. Type the path of the file in the field provided.

   - OR -

Perform the following steps:

   i. To locate a file that you want to upload, select Choose. The Choose File dialog box is displayed.
   ii. Select the file from the appropriate location, and click Open. The path of the selected file is displayed in the Attachment Version page.

4. In the Make this file Active? field, specify whether you want to make this version of the Attachment active.
5. Click **Upload.** A new version of the Attachment is created.

> **Note:**
>
> - You can maintain different versions of an Attachment, and choose to make one of them active. The Portal Users will be able to view only the active version of the attachment.
> - The maximum file size of the attachment that you can upload depends on the attachment size settings set in the System Settings area of the Administration tab.

Removing Attachments

On the **Attachment Library** main page, click to the left of the attachment you want to delete. The attachment is removed from the Attachment Library.

Article Groups

This section provides detailed information about Article Groups in Knowledge Spaces™ Admin Control Panel.

About Article Groups

Article Groups enable you to group or collect certain types of Articles together, and then set access to the Articles in the Portals, by restricting Portal access to one or more of the Article Groups.

Example:

Assume you have two groups of users who will have access to your Knowledge Spaces Articles, Customers and Employees. You intend to give your Employees access to all of your Articles, and only limited access to your Customers. Create two Article Groups; Approved for Customers, and Approved for Employees, and place Articles into Article Groups based on who should be able to view them.

If you are using personalized portals Article Groups are essential since the permissions of the external users are tied to the Article Groups. Any Article that must be available to an external user must be part of an Article Group that the user has access. You can also add categories to the Article Groups.

Click **Article Groups** in the Content tab to view a list of the Article Groups.

Article Groups transcend Knowledge Bases. You can have Articles that are in multiple Knowledge Bases, but still restrict viewing access from the portals by group.

Creating New Article Groups

To create new Article Groups, you must be granted the **Create New Article Group** permission in the Internal Access Profile associated to you.

To Create a New Article Group

1. Click  or the **New Group** link in the **Article Groups** page. The **Create Article Group** page is displayed.

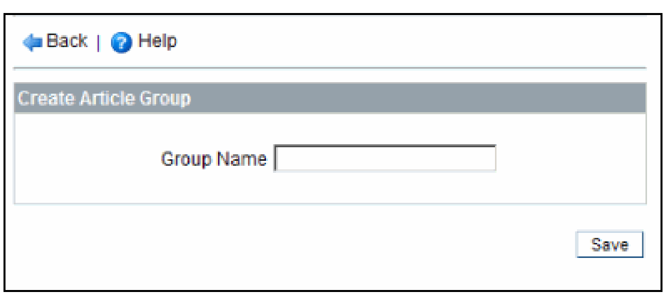


Figure 106 Create Article Group Page

2. In the **Group Name** field, type the name for the new Article Group.

3. Click **Save**. The new Article Group you created is displayed in the Article Groups page.

Renaming Article Groups

To edit an Article Group, you must be granted the **Edit Article Group** permission in the Internal Access Profile associated to you.

To Edit the Name of an Article Group

1. On the **Article Groups** page, click next to the Article Group you want to rename.
2. In the **Group Name** field, type the new name of the Article Group.
3. Click **Save**. The Article Group is renamed.

Deleting Article Groups

To delete an Article Group, you must be granted the **Delete Article Group** permission in the Internal Access Profile associated to you.

To Delete an Article Group

1. On the **Article Groups** page, click next the Article Group you want to delete.
2. If your Article Group is not associated to an Entitlement, a confirmation message is displayed.

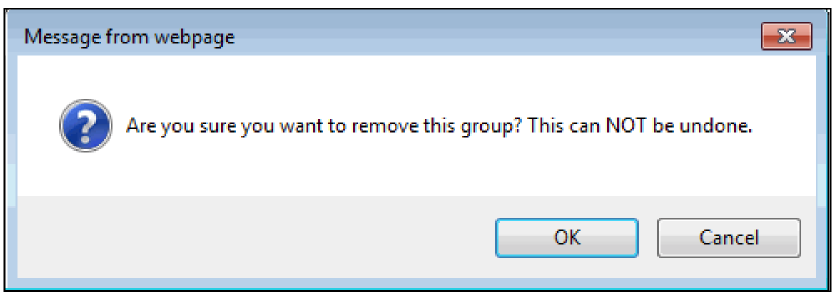


Figure 107 Confirmation Message Box to Delete an Article Group

3. Click **OK** to confirm your action.
   The Article Group is deleted.
   - OR -
   If your Article Group is associated to an Entitlement, you are prompted with the following message:

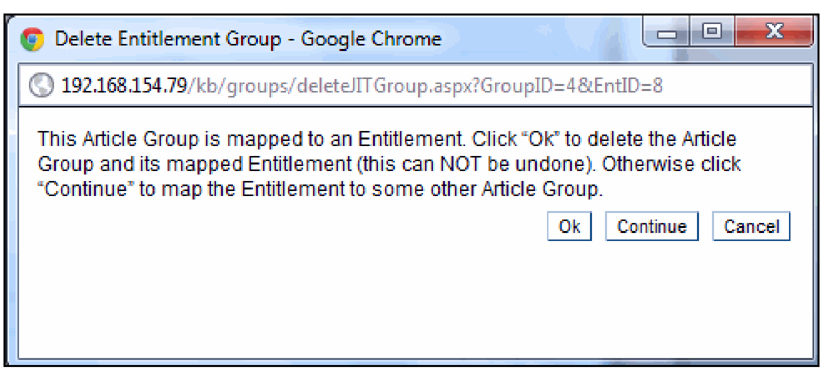


Figure 108 Confirmation Message to Delete an Entitlement Group

4. Click **OK** to delete the Article Group and the Entitlement associated to the Group.
   - Or -
   Click **Continue** to associate the Entitlement to some other Article Group.

Adding Articles to Article Groups

You can add Articles to Article Groups through the Article Management area under the Content tab. After you access the Article properties page for a specific Article, you can place that Article in your Article Group(s).

Making Article Groups Accessible Through KB Portals

You can specify the Article Group Settings for each portal. To do so:

1. In the Knowledge Base & Article Group Access area of the Portal Properties page, click **Configure**.

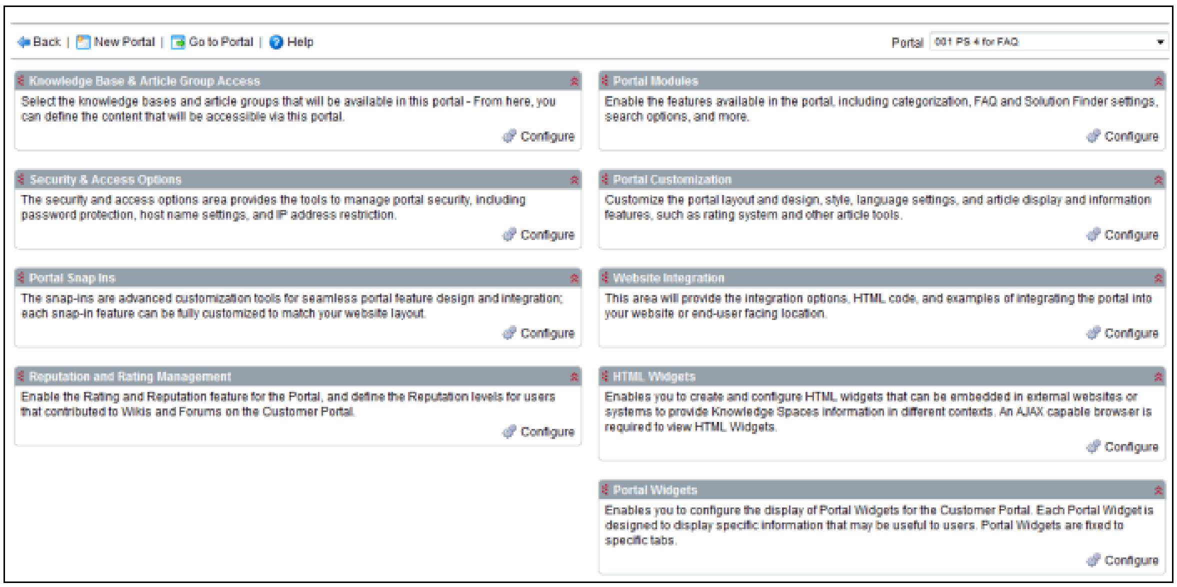


Figure 109 Portal Properties Page

2. Scroll down to the Article Group Access section.
3. Select the Show all articles and categories option.
   - OR -
4. Select the **Restrict by Groups** option, and select the check box next to the Article Group. Only the selected Article Groups will be accessible.
5. Click **Save**.

Frequently Asked Questions

This section provides you with detailed information about Managing Frequently Asked Questions (FAQs) in Knowledge Spaces™ Admin Control Panel. You will also learn about creating FAQ Categories to organize, and manage FAQs.

Frequently Asked Questions

The Frequently Asked Questions (FAQ) Management section of the Content tab enables you to create and edit an FAQ, and create FAQ categories to organize and manage FAQs. Using the FAQ Management section, you can also specify the order in which the FAQs are listed in the FAQ categories.

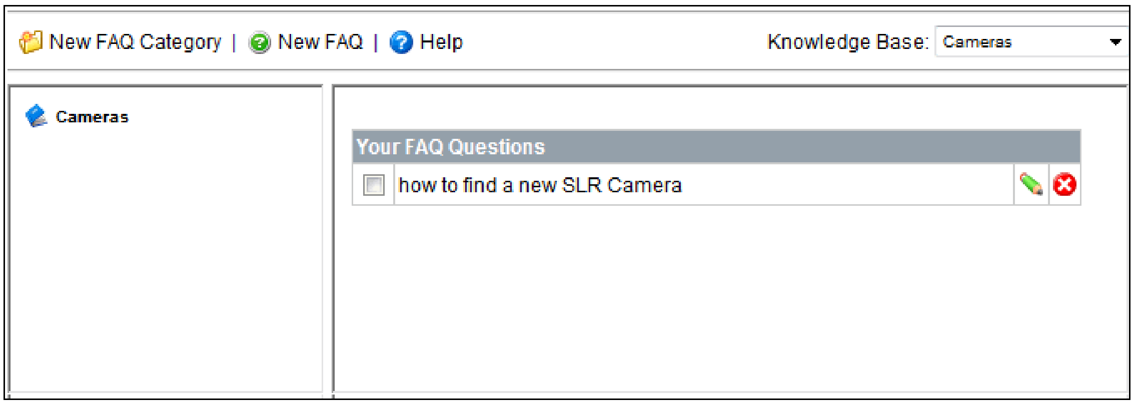


Figure 110 FAQ Management Home Page

> **Note:**
>
> There are important FAQ settings not located in the FAQ Management area. When configuring the Portal Modules in the Portal Modules section of the Portal tab, you must add the FAQ tab to your Portal for the FAQ tab to appear for the users. Clicking on the FAQ Options link, you can configure the order and layout of your FAQ categories as they appear in the Portal, as well as enable the Top Ten FAQs.
>
> You must be granted the **Create New FAQ Category** permission to create a new FAQ.

Creating FAQ Categories

You can create FAQ Categories for a Knowledge Base. From the **Content** tab, click **FAQ Management**. Existing FAQ Categories for a Knowledge Base are listed within the name of the Knowledge Base, and are represented by the  icon.

To Create a New FAQ Category

1. On the **Content** tab, click FAQ Management. The **FAQ Management** Home page is displayed.
2. From the **Knowledge Base** list, select the Knowledge Base in which you want to create the new FAQ.

3. Click or the **New FAQ Category** link. The **New FAQ Category** page is displayed.

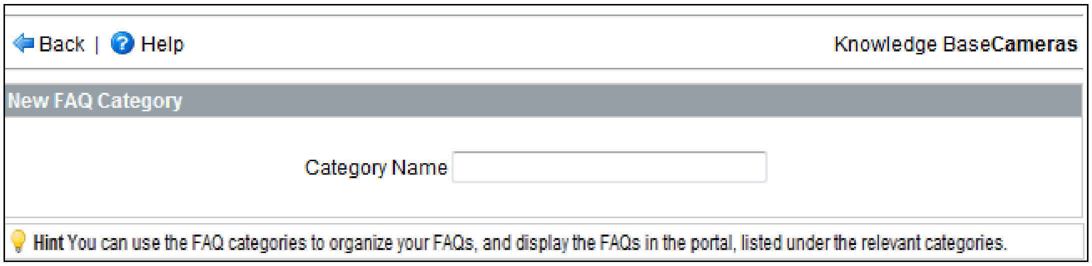


Figure 111 New FAQ Category Page

4. In the **Category Name** field, type the name for the new FAQ category.
5. Click **Save**. The new FAQ category is displayed in the **FAQ Management** page.

Editing an FAQ Category

You can edit the name of the FAQ Categories.

> **Note:**
>
> You must be granted the Edit FAQ Category permission to edit the name of an FAQ Category.

To Edit the FAQ Category Name

1. On the **Content** tab, click **FAQ Management.** The FAQ Management Home page is displayed.
2. Select the appropriate Knowledge Base from the Knowledge Base list.

   The FAQ Categories within the selected Knowledge Base are displayed.

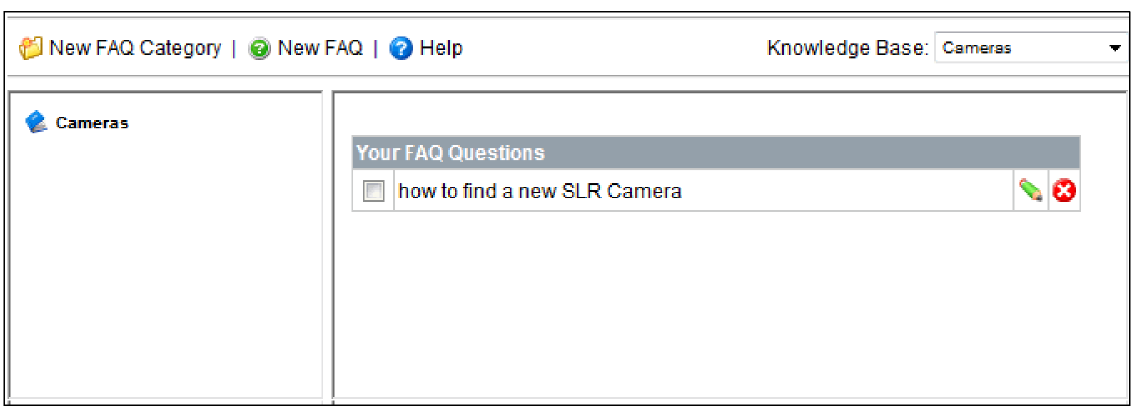


Figure 112 Page Showing the FAQ Categories within a Knowledge Base

3. On the left of the **FAQ Category** name, click . The **Edit Category** page is displayed.

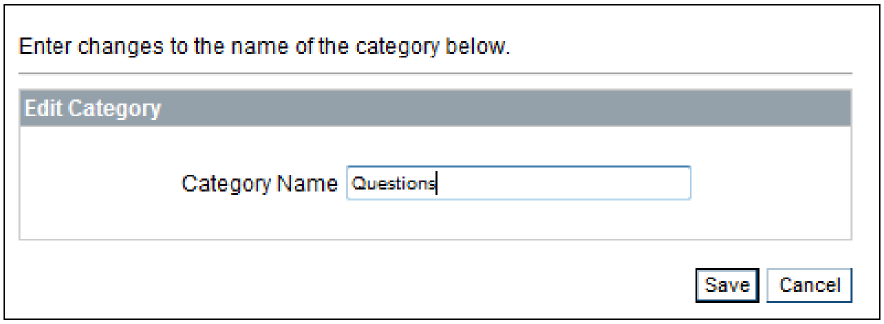


Figure 113 Edit FAQ Category Window

4. In the **Category Name** field, type the new FAQ Category name.
5. Click **Save**.

   - OR -

   Click **Cancel** to cancel the operation.

Deleting a FAQ Category

You can delete the FAQ Categories.

> **Note:**
>
> You must be granted the **Delete FAQ Category** permission to delete an FAQ Category.

To Delete a FAQ Category

1. On the **Content** tab, click **FAQ Management**. The FAQ Management Home page is displayed.
2. Select the appropriate Knowledge Base from the Knowledge Base list.

   The **FAQ Categories** within the selected Knowledge Base are displayed.

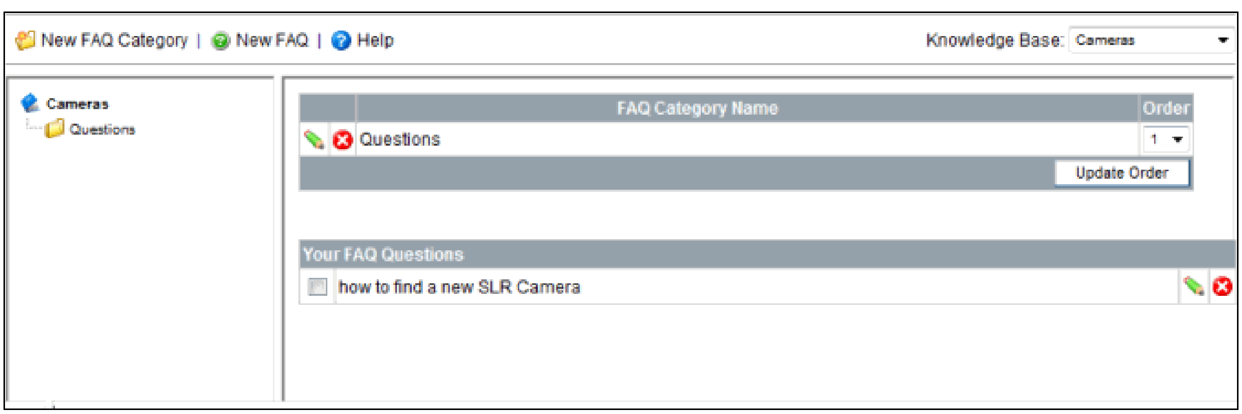


Figure 114 Page Showing the FAQ Categories within a Knowledge Base.

1. On the left of the FAQ Category name, click . A confirmation message is displayed.

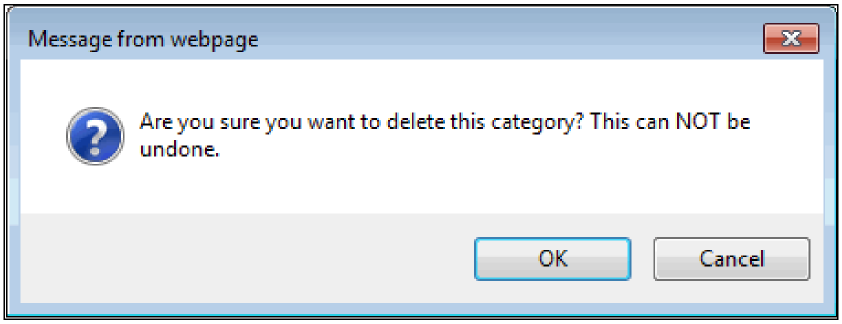


Figure 115 Delete FAQ Category Message Box

2. Click **OK.**
3. Click **Cancel** to cancel the delete operation.

Creating New FAQs

The **New FAQ** option enables you to create new FAQ, and assign them to articles in the selected Knowledge Base or create the answer to your FAQ on the fly.

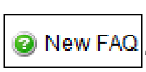
After you create an FAQ and assign it to an Article in the Knowledge Base or create the FAQ answer, the selected Article displays when a user clicks on the FAQ.

You can provide the answer to an FAQ in one of the following ways:

- Refer the User to an existing Article (using Option 1 – Select an existing article.)
- Create a new Knowledge Base article to address the FAQ (using Option 2 – Type the answer to create a new knowledge base article)

> **Note:**
>
> You must be granted the **Create New FAQ** permission to create a new FAQ.

To Create an FAQ using Option 1

1. On the **Content** tab, click **FAQ Management**. The FAQ Management page is displayed.
2. Click . 

The following page is displayed.

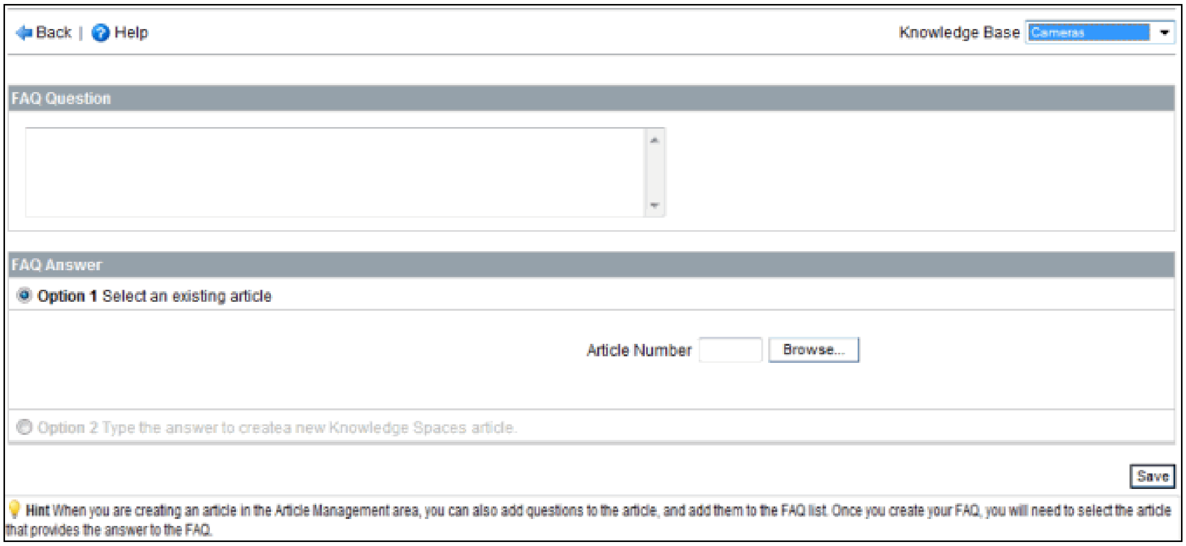


Figure 116 Create FAQ Main Page

3. In the **FAQ Answer** section, select Option1: Select an existing article. By default, Option 1 is selected.
4. In the **FAQ Question** field, type the FAQ question.
5. In the **Article Number** field, type the ID of the Article that provides the answer to the question.

   - OR -

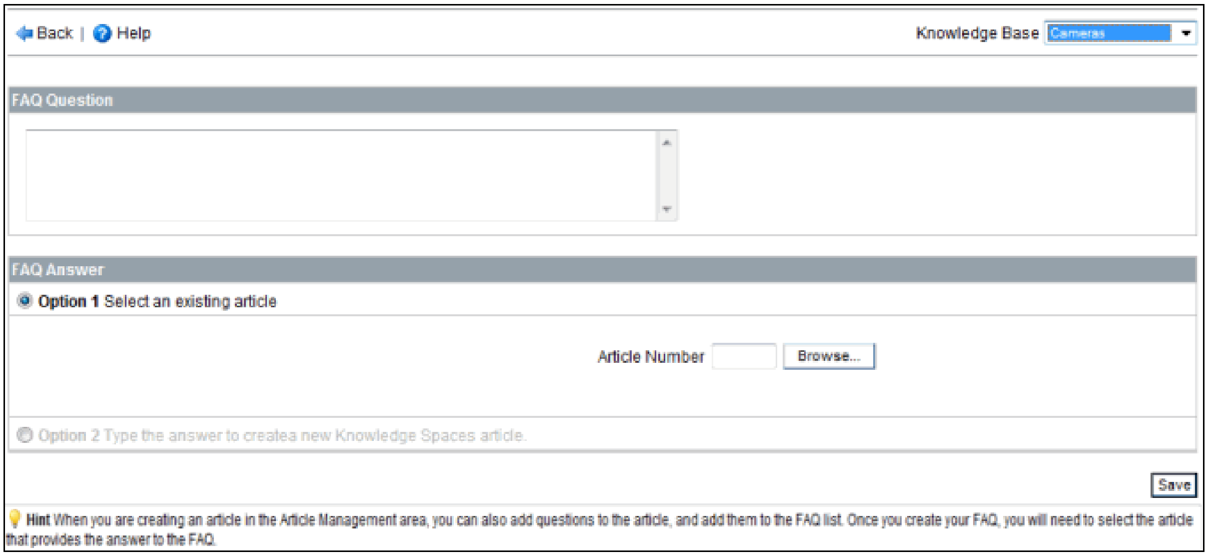
6. Click **Browse**, and select the article from the list of Articles. You can also search for the relevant Article.
7. Click **Save**.

> **Note:**
>
> You can also create FAQs for Articles when creating or editing the individual articles in the Article Management area.

To Create an FAQ using Option 2

1. On the **Content** tab, click **FAQ Management.** The **FAQ Management** page is displayed.

2. Click



. The following page is displayed.

Figure 117 Create FAQ Page Main Page

3. Select Option 2: Type the answer to create a new Knowledge Base article.

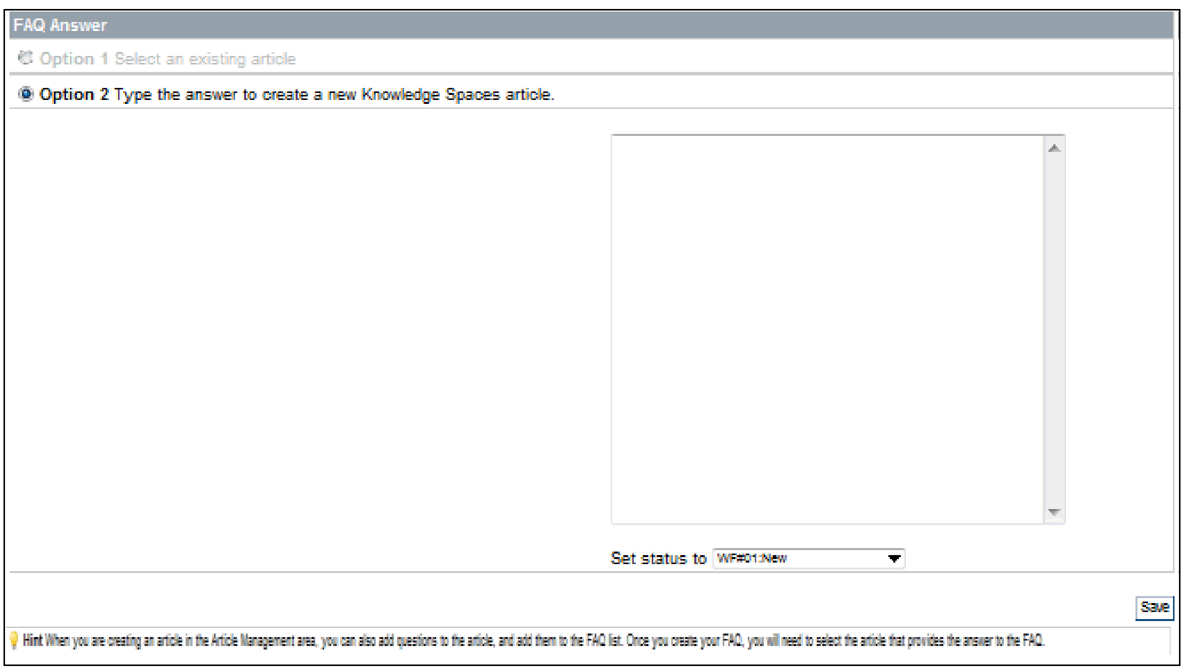


Figure 118 FAQ Management Page – Creating an FAQ using Option 2

4. In the **FAQ Question** field, type the FAQ question.
5. In the space provided, type the answer of the FAQ. A new Knowledge Base article will be created with this content.

6. In the **Set status to** list, select the Workflow step to which the article must be added.

> **Note:**
>
> The **Set Status to** list lists all the workflows to which you have access, in addition to the default workflows associated with the Knowledge Base in which you are trying to create the FAQ.

7. Click **Save.** The new FAQ is added, and an article is created for the FAQ.

> **Note:**
>
> A Portal User can view the FAQs associated with an Article, only when the FAQ Article is Published in the Knowledge Base.

Adding a FAQ to FAQ Categories

You can add FAQs to an FAQ Category. FAQs that have not been categorized are displayed in the main FAQ Management page.

When you add an FAQ to a Category, the FAQ is displayed within that Category in Spaces by Moxie™ - Knowledge Spaces™ Customer Portal.

To Add an Uncategorized FAQ in the Knowledge Base to an FAQ Category

1. On the **Content** tab, click **FAQ Management**. The **FAQ Management** page is displayed.
2. Select the appropriate Knowledge Base from the Knowledge Base list.

   The Categories within the Knowledge Base are displayed.

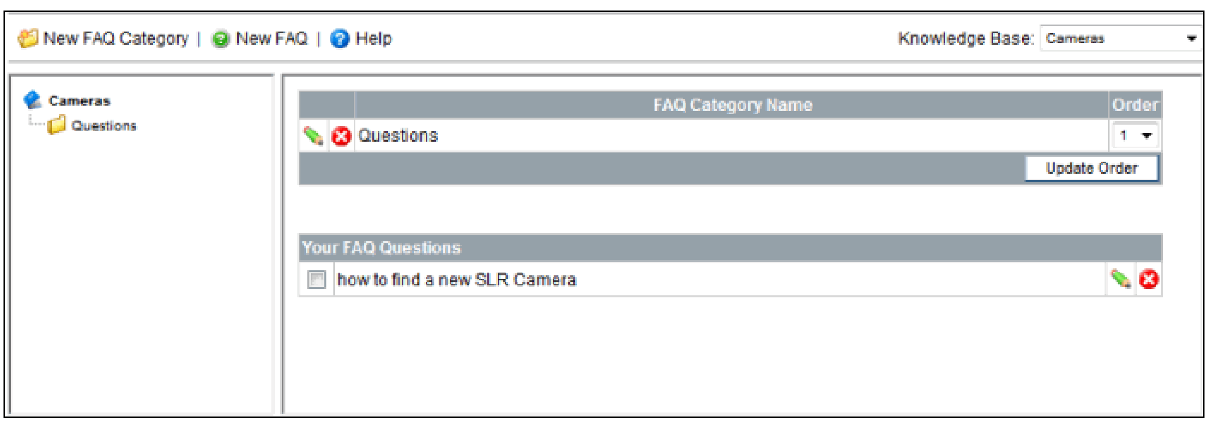


Figure 119 Page Showing the FAQ Categories within a Knowledge Base

3. Select an FAQ Category in the **FAQ Category Name** column. The FAQs within the Category and a list of Uncategorized FAQs in the Knowledge Base are displayed.

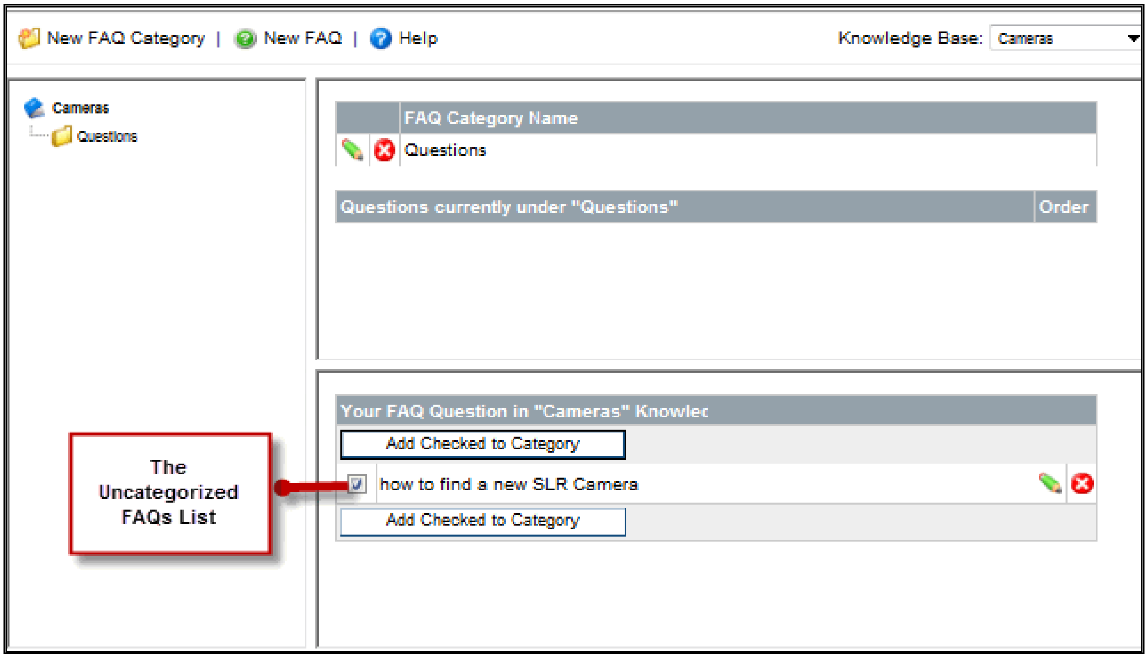


Figure 120 FAQ Management Page

4. From the **Uncategorized FAQs** list, select the check box next to each FAQ that you want to add to the FAQ Category.
5. Click **Add Checked to Category.** The FAQ appears within the selected FAQ Category.

> **Note:**
>
> FAQs that you have already added to a Category do not appear in the Uncategorized FAQs area. To add an FAQ to multiple Categories, create the same FAQ as many times as is required, and add them to the appropriate FAQ Categories.

Editing a FAQ

You can edit the text of an FAQ (Frequently Asked Question), and change the Article associated with the FAQ. To edit an FAQ, you must first remove its association with its Category.

> **Note:**
>
> You must be granted the **Edit FAQ** permission to edit an FAQ.

To Edit a Frequently Asked Question

1. On the **Content** tab, click **FAQ Management**. The FAQ Management page is displayed.
2. Select the appropriate Knowledge Base from the Knowledge Base list.

   The FAQ Categories within the Knowledge Base are displayed.
3. In the **FAQ Category Name** column, click the FAQ Category associated with the FAQ you want to edit.

   The FAQs within the FAQ Category, and a list of uncategorized FAQs in the selected Knowledge Base are displayed.

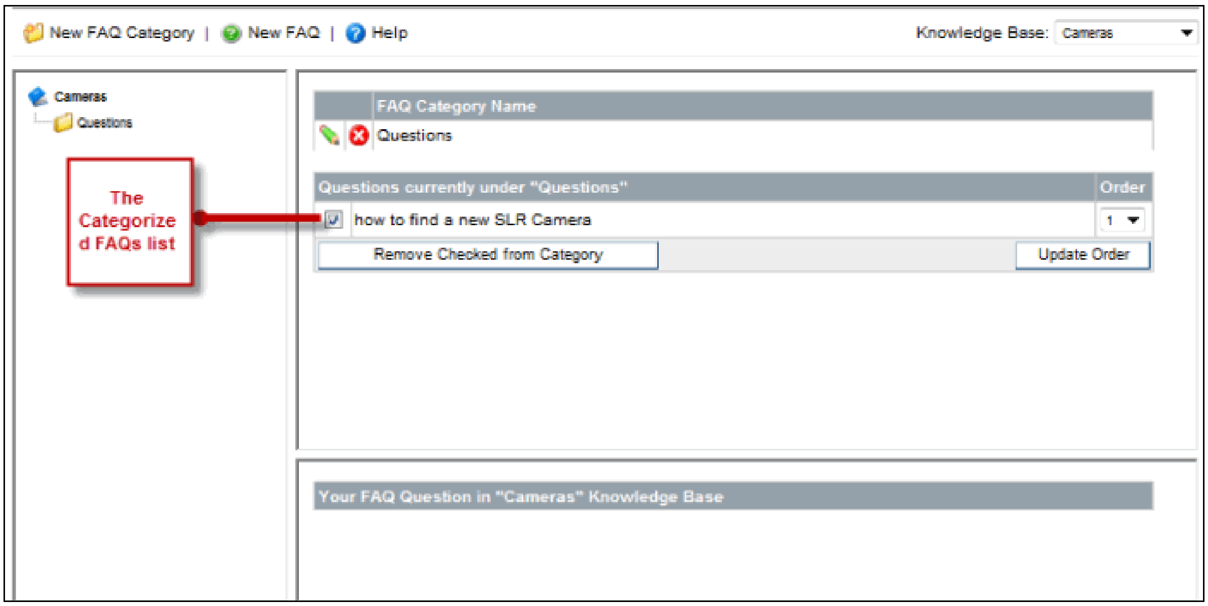


Figure 121 FAQ Management Page

4. In the **Uncategorized FAQs** list, select the check box next to the FAQ you want to edit.
5. Click the **Remove Checked** from Category button. The FAQ's association with its FAQ Category is removed, and the FAQ is moved to the Uncategorized FAQs list.
6. From the Uncategorized FAQs list, click  next to the FAQ you want to edit.

   The **Edit FAQ Question** page is displayed.

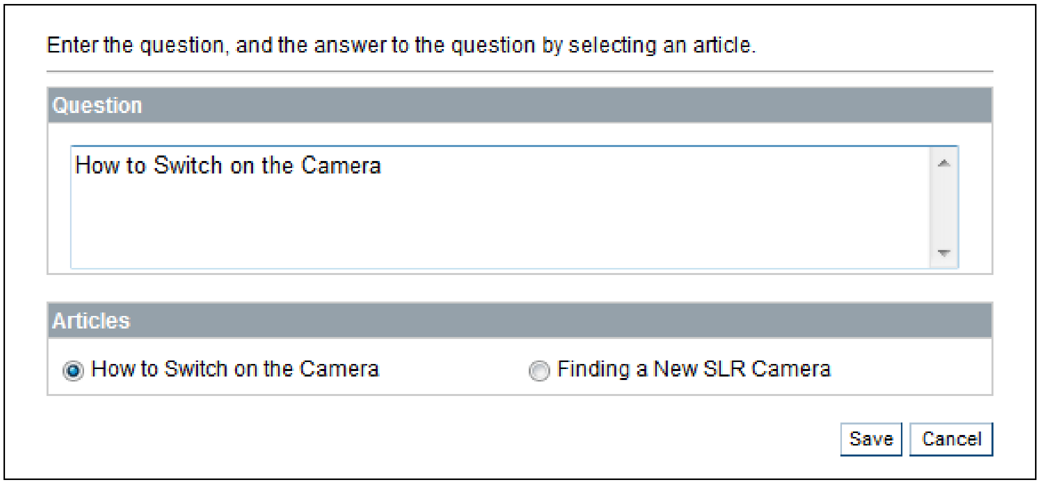


Figure 122 Edit FAQ Question Page

7. Modify the content of the FAQ question as required.
8. Select the Article to which the FAQ question should be associated.
9. Click **Save** to save the FAQ changes.

   - OR -

   Click **Cancel** to cancel the operation.

Deleting a FAQ Question

You can delete an FAQ question.

> **Note:**
>
> You must be granted the **Delete FAQ permission** to delete an FAQ question.

To Delete an FAQ Question

1. On the **Conten**t tab, click **FAQ Management.** The FAQ Management page is displayed.
2. Select the Knowledge Base from the Knowledge Base list.

   The Categories within the Knowledge Base are displayed.
3. Select an **FAQ Category** in the **FAQ Category Name** column. The FAQs within the Category and a list of Uncategorized FAQs in the Knowledge Base are displayed.
4. From the **Uncategorized FAQs** list, click next to the FAQ you want to delete. A confirmation message is displayed.

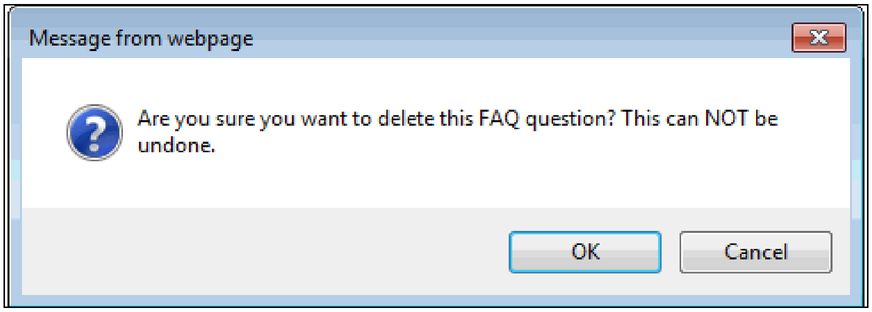


Figure 123 Message Box to Delete an FAQ Question

5. Click **OK**. The FAQ is deleted from the Knowledge Base.

Arranging FAQs

In this section, you can determine the order of FAQs within a selected FAQ category.

The FAQ Category Name will be listed at the top of the FAQ Management page.

All the FAQs in an FAQ category are listed below the Category Name. If an FAQ is not displayed in the FAQ Category list, no FAQs have been added to the Category.

If FAQs are displayed, these FAQs are currently in the FAQ category. You can remove FAQs from the Category, and you can change the order of the FAQs, as they appear in Spaces by Moxie™ - Knowledge Spaces™ Customer Portal.

To Remove an FAQ from the Category

1. Select the check box next to the FAQ that you want to remove.
2. Click **Remove Checked from Category.** The FAQ is removed from this category and listed in the Uncategorized FAQ in the Knowledge Base.

To Change the Order of FAQs

1. Using the list to the right of each FAQ, select a new listing Order.
2. Click **Update Order**. The new order is saved.

   If you do not select an order, the FAQs are listed alphabetically.

Solution Finder

This section provides detailed information about Solution Finders in Knowledge Spaces™ Admin Control Panel. You will learn about the need for Solution Finders, and about managing the Solution Finders.

About Solution Finder

The Solution Finder section of the Content tab enables you to setup, and manage Solution Finders. You must be granted the **Solution Finder** permission in the **Internal Access Profile** page to access the Solution Finder functionality.

Solution Finders enable Portal users to navigate a series of steps, further defining a problem as the users progress until the users reach the point where the solution can be confidently delivered. Solution Finders can be as simple or complex as the situation requires, and easily changed as problems, and diagnostic processes evolve. The key benefits of Solution Finders is that, the Solution Finders provide a root cause analysis path to Articles that already exist in Knowledge Spaces. Knowledge Spaces™ Admin Control Panel can also be configured to present appropriate Solution Finders based on user searches.

Example:

The KB Portal user can access the Knowledge Base through the Contents tab on the Portal, and choose a Solution Finder from the Solution Finder tab. The Portal user can choose the Solution Finder category that best answers the users question.

The following example explains the directory structure of a Solution Finder for **Email setup**.

On the KB Portal the User will click **Solution Finder** tab and select the **Email setup** Solution Finder from the list of Solution Finders displayed.

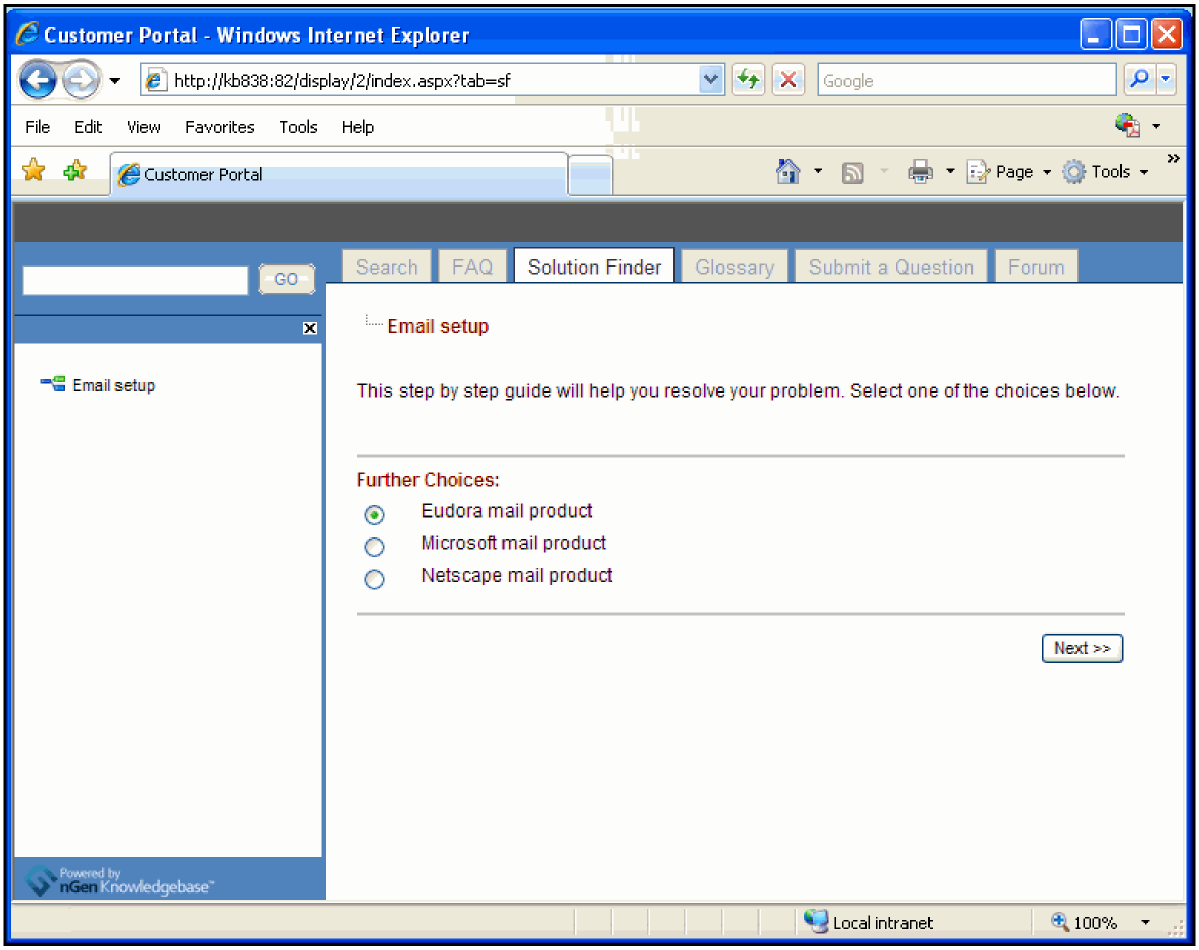


Figure 124 Solution Finder Page on the KB Portal

A series of Choice options are listed:

- Microsoft mail product
- Netscape mail product
- Eudora mail product.

The User selects Microsoft mail product. The following options are displayed:

- Microsoft Exchange
- Microsoft Internet Mail
- Microsoft Outlook

To configure Outlook, the User selects Microsoft Outlook. The Solution Finder displays the following options:

- Outlook
- Outlook Express

To configure Outlook Express, the User selects Outlook Express. The following options are displayed:

- Setup Outlook Express for the first time
- Add a new account to Outlook Express
- Make configuration changes to Outlook Express

To set up Outlook Express for the first time, the User selects Setup Outlook Express for the first time. The User will be presented with an article that guides through the complete process of setting up Outlook Express.

The setup and management of Solution Finders is carried from the Solution Finder Home page

Solution Finder Home Page

From the Content tab, click Solution Finder. The Solution Finder Home page is displayed.

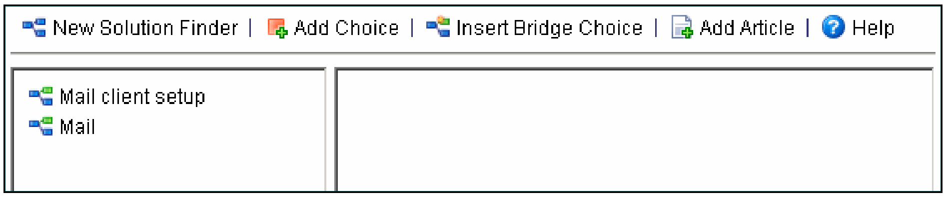


Figure 125 Solution Finder Home Page

The Solution Finder Home page contains two frames, and several buttons across the top of the page. Using the buttons, you can create new Solution Finders, add articles, and choices to the Solution Finders.

The left frame displays an alphabetical listing of existing Solution Finders and is indicated by the symbol. The frame on the right is where creation and maintenance of a Solution Finder takes place.

Expanding a Solution Finder

Clicking a Solution Finder name in the left frame loads the Solution Finder for editing in the right frame. When you expand a Solution Finder, the Solution Finder name is displayed at the top of the right frame, and the Articles and Choices are shown below.

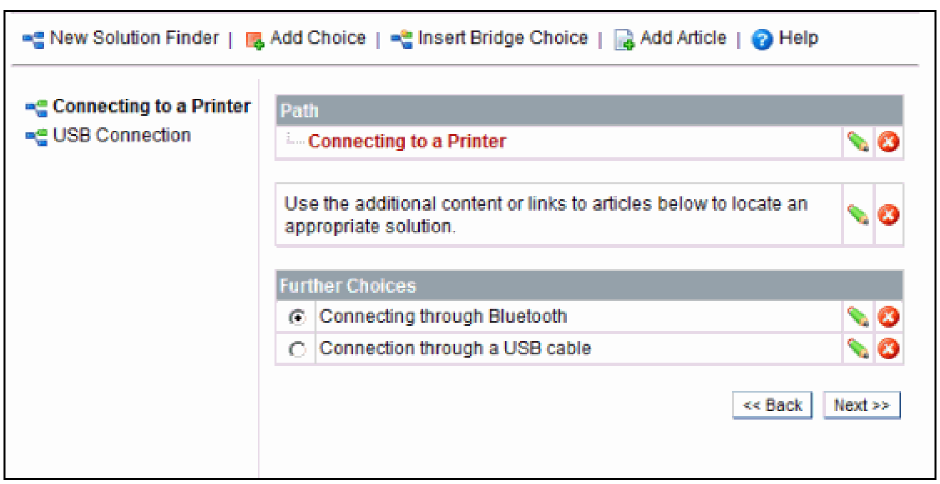


Figure 126 Page Showing the Solution Finder Articles and Choices

Creating a New Solution Finder

You can create a new Solution Finder.

> **Note:**
>
> You must be granted the **Create New Solution Finder** permission in the Internal Access Profile page to create a new Solution Finder.

To Create a New Solution Finder

1. On the **Content** tab, click S**olution Finder**. The **Solution Finder** page is displayed.
2. Click 

. The **New Solution Finder** page is displayed.

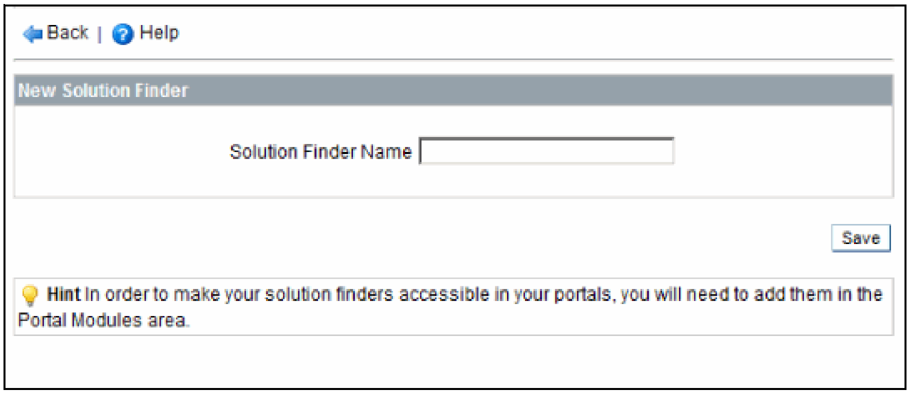


Figure 127 New Solution Finder Page

3. In the **Solution Finder Name** field, type the name for the new Solution Finder.
4. Click **Save**. The new Solution Finder is displayed in the left frame of the Solution Finder Home page.

> **Tip:**
>
> When you name a Solution Finder, use a name that is easily recognizable to your users, and relates to the problem being solved. For example, to create a Solution Finder about email, you can name it E-mail Help.

> **Note:**
>
> You can create Solution Finders with HTML text.

Editing a Solution Finder

You can edit the name and default text of a Solution Finder.

> **Note:**
>
> You must be granted the **Edit Statement** permission in the Internal Access Profile page to edit the name and default text of a Solution Finder.

You can add, delete, or edit the text that the Portal Users view when navigating through a Solution Finder.

The text **This step-by-step** guide will help you resolve your problem. Select one of the choices below is created by default when you create a new Solution Finder.

To Edit Solution Finder Text

1. On the Content tab, click Solution Finder. The Solution Finder Home page is displayed.
2. Click the Solution Finder whose text you want to edit.
3. Click next to the Solution Finder text. The New Solution Finder page is displayed.

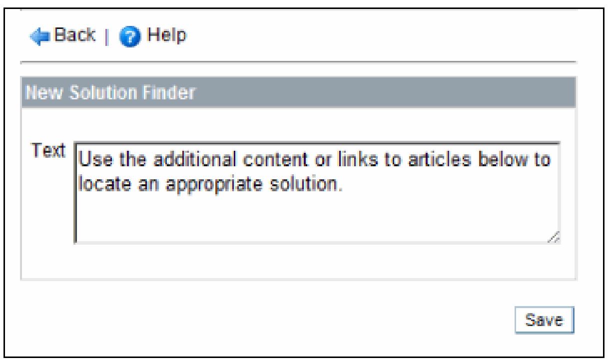


Figure 128 New Solution Finder Page

4. In the **Text** field, type the new Solution Finder text.
5. Click **Save**.

To Edit Solution Finder Name

1. On the **Content** tab, click **Solution Finder**. The **Solution Finder** page is displayed.
2. Click the **Solution Finder** whose name you want to edit.
3. On the right of the Solution Finder name, click . The **Edit Solution Finder** page is displayed.

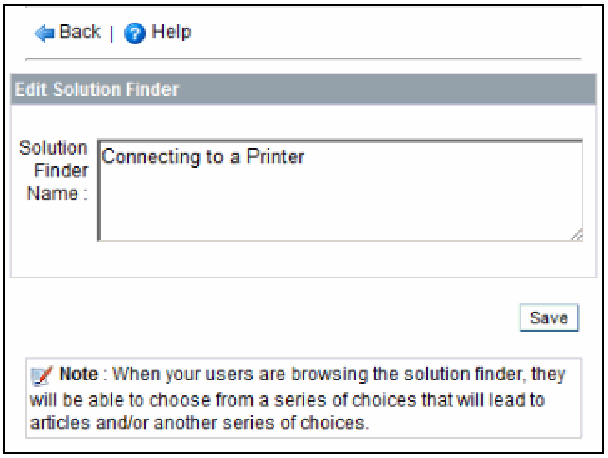


Figure 129 Edit Solution Finder Page

4. In the **Solution Finder Name** field, type the new Solution Finder name.
5. Click **Save**.

Deleting a Solution Finder

You can delete a Solution Finder name, and text.

> **Note:**
>
> - You must be granted the **Delete Solution Finder** permission to delete a Solution Finder.
> - You must be granted the Delete Statement permission to delete the text of a Solution Finder.

To Delete a Solution Finder Text

1. On the **Content** tab, click Solution Finder. The Solution Finder Home page is displayed.
2. Click the **Solution Finder** whose text you want to delete.
3. On the right of the Solution Finder text, click . A confirmation message is displayed.

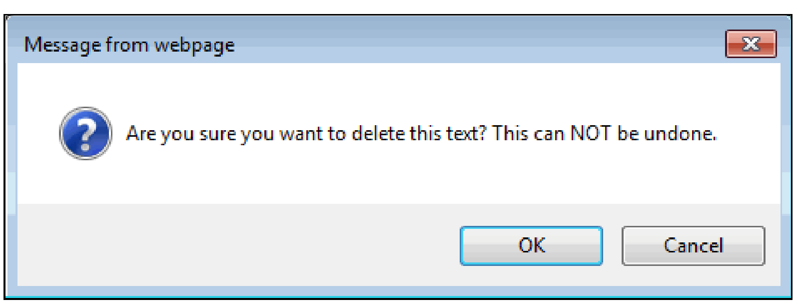


Figure 130 Delete Solution Finder Message Box

4. Click **OK**.
5. Click **Cancel** to cancel the delete operation.

To Delete a Solution Finder

1. On the **Content** tab, click **Solution Finder**. The **Solution Finder** page is displayed.
2. Click the Solution Finder you want to delete.
3. On the right of the Solution Finder name, click . A confirmation message is displayed.

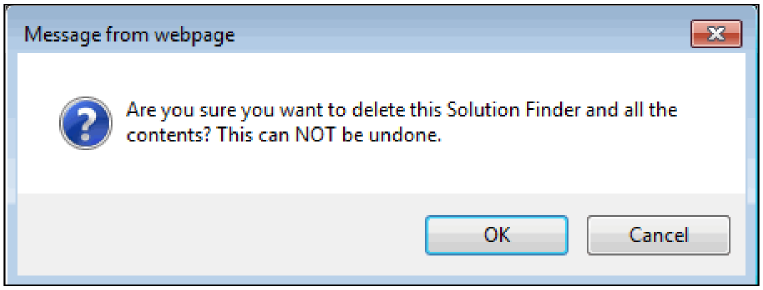


Figure 131 Delete Solution Finder Window

4. Click **OK**.

   - OR -

   Click **Cancel** to cancel the delete operation.

About Solution Finder Choices

After you select a Solution Finder, you can view the choices associated with the Solution Finder in the Further Choices area on the Solution Finder page.

Each choice is a link. Click the choice to display all the topics within the choice. As you navigate through Solution Finder choices, the Solution Finder choice structure appears in gray above the current choice menu. In the structure, each choice selected appears as a link. To go back to any of the previous choices, click the link in the Solution Finder choice structure.

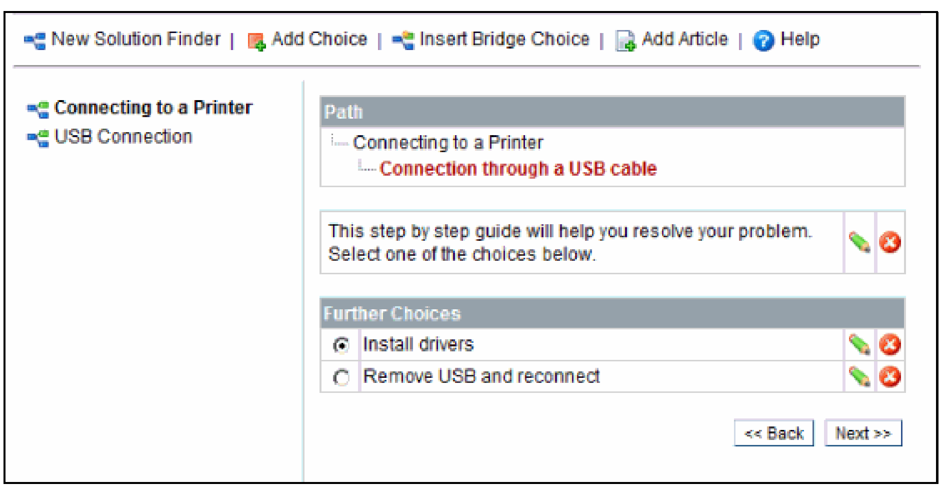
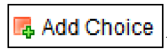


Figure 132 Page Showing the Solution Finder Choice Structure

Creating a New Solution Finder Choice

After you have added a Solution Finder, use 

to create the structure of the Solution Finder.

> **Note:**
>
> You must be granted the **Add New Choices** permission to create a new Solution Finder Choice.

To Create a Solution Finder Choice

1. On the **Content** tab, click **Solution Finder**. The **Solution Finder** page is displayed.
2. Select the Solution Finder within which you want to add a Choice.

> **Note:**
>
> If you are adding Choices to a new Solution Finder, your first Choice is directly below the new Solution Finder.

3. Navigate to the level in the Solution Finder structure where you want the new Choice to appear, click . The New Solution Finder Choice page is displayed.

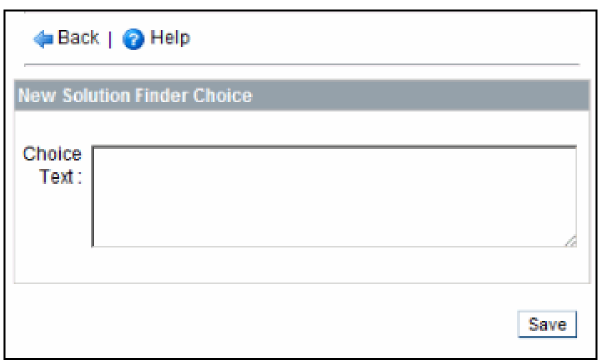


Figure 133 New Solution Finder Choice Page

4. In the **Choice Text** field, type the text for the new choice.
5. Click **Save**. The text of the new choice is saved in the correct location in the Solution Finder directory structure.

> **Note:**
>
> You can edit text typed in the **Choice Text** area by clicking the Choice names in the Solution Finder directory structure.

Editing a Solution Finder Choice

You can edit a Solution Finder choice.

> **Note:**
>
> You must be granted the **Edit Statement** permission to edit the name and default text of a Solution Finder.

You can add, delete, or edit the text that the Portal Users view when the Users navigate through a Solution Finder.

The text This step-by-step guide will help you resolve your problem. Select one of the choices below is created by default when you create a new Solution Finder.

To Edit Solution Finder Choice Text

1. On the **Content** tab, click **Solution Finder**. The **Solution Finder** page is displayed.
2. Click the **Solution Finder**, and click the Choice name whose text you want to edit.

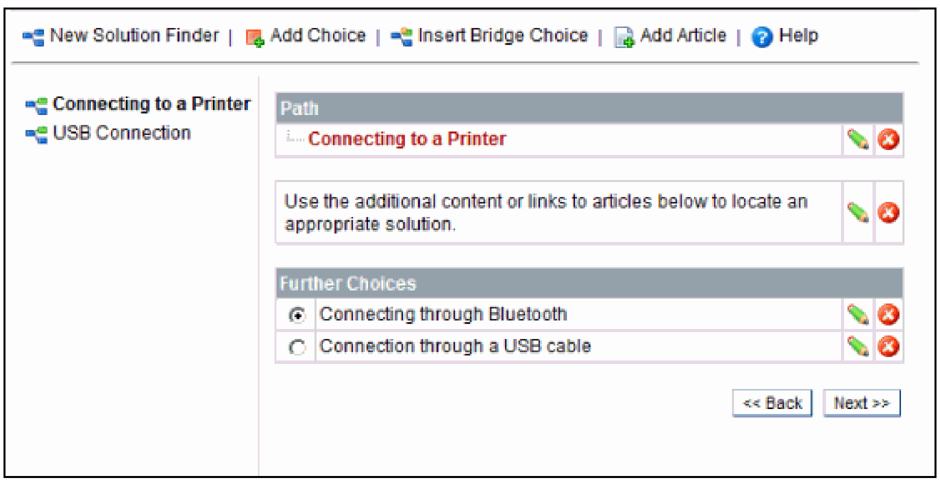


Figure 134 Solution Finder with the Choice Name and Choice Text

3. On the right of the Choice text, click  . The **New Solution Finder** page is displayed.\

Figure 135 New Solution Finder Page

4. In the Text field, type the new Solution Finder text.
5. Click **Save**.

Deleting a Solution Finder Choice

You can delete a Solution Finder choice.

> **Note:**
>
> You must be granted the **Delete Choices** permission to delete a Solution Finder.

To Delete a Solution Finder Choice

1. On the **Content** tab, click **Solution Finder.** The **Solution Finder** page is displayed.
2. Click the **Solution Finder** which contains the Choice you want to delete.
3. Navigate in the Solution Finder directory structure to the Choice which you want to delete.
4. On the right of the Choice name, click . You are prompted with the following message.

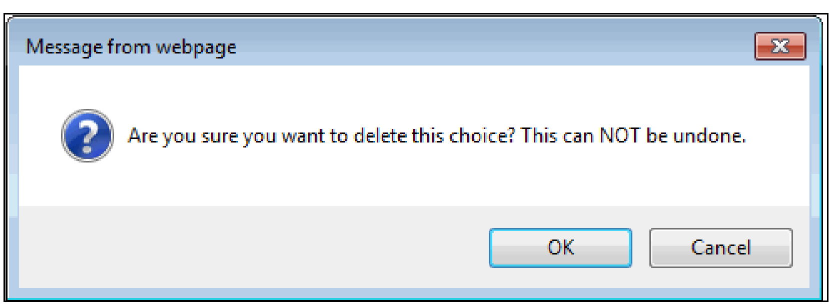


Figure 136 Solution Finder Choice Deletion Window

5. Click **OK.** The **Sub-choices** page is displayed.

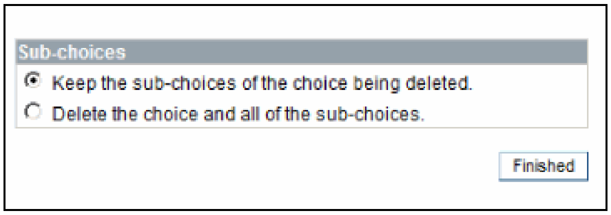


Figure 137 Sub-choices Page

The Keep the sub-choices of the choice being deleted option is selected by default. Click Finished to delete only the Choice and retain the sub-choices within the Choice.

- OR -

Select the Delete the choice and all of the sub-choices option, and click **Finished.** The Choice and all the sub-choices within the Choice are deleted.

Creating a Bridge Choice

You can insert a Choice level in a Solution Finder between existing Choice levels. This process is called Bridge Choice.

> **Note:**
>
> You must be granted the **Add Bridge Choice** permission to create a Bridge Choice.

To Create a Bridge Choice

1. On the **Content** tab, click **Solution Finder**. The **Solution Finder** page is displayed.
2. Select the Solution Finder in which you want to add a Bridge Choice. Drill down to the choice level that is one level above the level where you would like to create the Bridge Choice.
3. On the Solution Finder menu, click . The **New Solution Finder Bridge Choice** page is displayed.

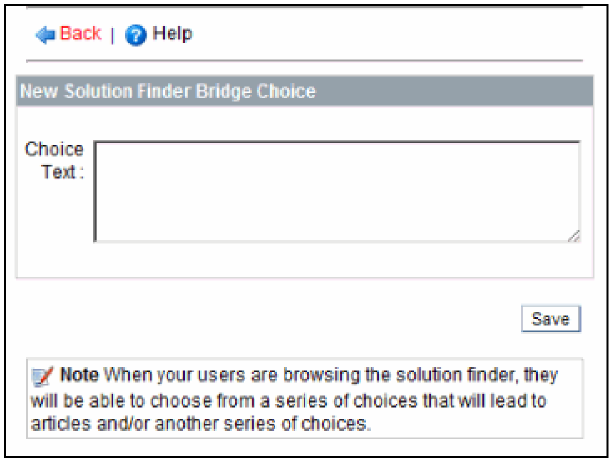


Figure 138 New Solution Finder Bridge Choice Page

4. In the **Choice Text** field, type the content for the Solution Finder Choice.
5. Click **Save**.

Adding Articles to the Solution Finder

You can add Articles to a Solution Finder, or to a Solution Finder Choice.

> **Note:**
>
> You must be granted the **Add New Articles** permission to add new Articles to a Solution Finder.

To add an Article within a Choice, you must select, and expand the Choice in which you want to insert the Article. The Choice becomes the last level displayed in the Solution Finder directory structure.

Clicking on the Article title, or Article number in the Solution Finder structure displays the Article Properties page.

The following table illustrates the Directory Structure of a Solution Finder.

Food	Solution Finder
Italian	(Choice)
Pizza	(Choice)
Lasagna	(Choice)
Meat	(Choice)
Cheese	(Choice)
#9854 How to Cook Cheese Lasagna	(Choice)
Mexican	(Choice)

Food	Solution Finder
French	(Choice)

You can have both Articles and Choices under a single Choice heading.

There is no limit to the number of Solution Finders, Choices, and Articles that you can build within this structure.

When you have expanded the Solution Finder to display the choice where you want to place a new Article, it provides the tools to place a new Article in that location.

Adding an Article into the Choice

1. On the **Content** tab, click **Solution Finder**. The Solution Finder page is displayed.
2. Select the Solution Finder, and navigate to the Article location Choice by clicking the name of the Choice where you want to place the Article.
3. Click . 

The **Add New Solution Finder Article** page is displayed.

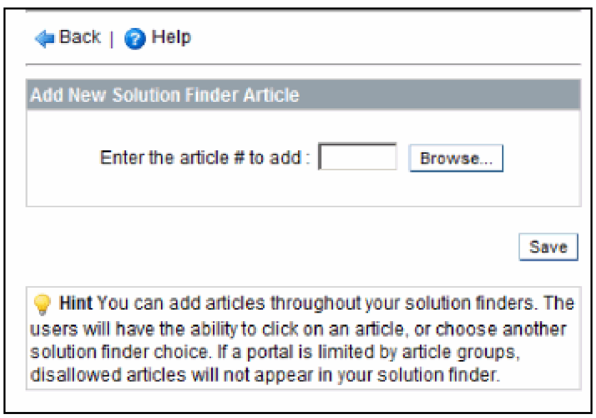


Figure 139 Add New Solution Finder Article Page

4. In the Enter the article # to add field, type the Article ID.

   \- OR -

   Click **Browse**, and select the Article from the list of Articles. You can also search for the relevant Article.
5. Click **Save**. The Article is saved in the proper Solution Finder location.

> **Note:**
>
> When you add the Article to the Choice, the Article is displayed in the Solution Finder.

Removing an Article from the Choice

You can remove an Article from a Choice.

> **Note:**
>
> You must be granted the **Delete Articles** permission to remove an Article from a Choice.

To Remove an Article from a Choice

1. On the **Content** tab, click **Solution Finde**r. The **Solution Finder** page is displayed.
2. Select the Solution Finder, and navigate to the Article location Choice by clicking the name of the Choice.
3. On the right of the Article name, click .You are prompted with the following message.

Figure 140 Delete Article From the Choice Message Box

4. Click **OK**.
5. Click **Cancel** to cancel the operation.

Glossary

This section covers the Glossary feature of Knowledge Spaces™ Admin Control Panel.

About Glossary

The Glossary section of the ***Content*** tab includes tools to create and manage Glossaries of terms. Users can create and manage Glossaries in the Knowledge Spaces™ Admin Control Panel that can be viewed in the Portal, thus providing easy access to a number of terms, and their definitions.

> **Note:**
>
> - You must be granted the **Create New Glossary Item** permission to create a Glossary and/or Terms.
> - To successfully create a Glossary Term, you need appropriate permissions to the Default Workflow steps.
> - You must associate a Glossary to a Portal for the users to view the Glossary terms on the Portal

You can have multiple Glossaries in a Portal. Having more than one Glossary helps define terms as they relate to a particular subject and words may have multiple meanings relevant to different subjects. This gives your Knowledge Base users all the information they need at their fingertips.

The Knowledge Spaces™ Customer Portal Users can select a Glossary and click on a letter of the alphabet or the "#" sign to view the Glossaries under the selected letter or sign.

Glossary terms use the Default Workflow process as all Articles in the system use a Workflow. When a Glossary term is created, it is New, and moves through the Workflow approval process in the same manner as an Article until the Glossary term is Published on the Portal. For more information about the Workflow approval process, **see "About Workflow Editor" on page 392**.

In the KB Portal each Glossary lists the terms within the appropriate starting letter. For the selected letter, Glossary terms are listed alphabetically.

When the list of terms for a letter is displayed, you can sort the list:

- Alphabetically
- By Modified Date

The **Name** heading above the term names, and the Modified heading above the dates adjacent to the term names are links. When you click the Modified link, the terms are sorted in order of the date they were last modified or created. When you click the Name link, the articles revert to their original alphabetical listing.

The Workflow status of the Glossary term is located to the right of the Date Modified area. If a term is published in the Workflow step, it appears as Published in the KB Portal. If the glossary term is in New or other preliminary stage, it appears listed as in that step, and not available for Portal viewing. Use the menu above the Workflow listing to display only those terms that are in certain Workflow steps. For example, if you select draft, only terms that are in the draft stage are displayed. All Glossary terms are displayed by default.

> **Note:**
>
> Users can view the Glossary items in Workflow steps for which the users have appropriate permissions. For example, a user must have access to the **New Workflow** step to see Glossary items that are in the New step.

Creating a New Glossary

You can create a New Glossary that can be used across one or many Portals.

> **Note:**
>
> You must be granted the **Create New Glossary Item** permission to create a Glossary.

To Create a New Glossary

1. On the **Content** tab, click **Glossary**.

   The **Glossary Management** page is displayed.

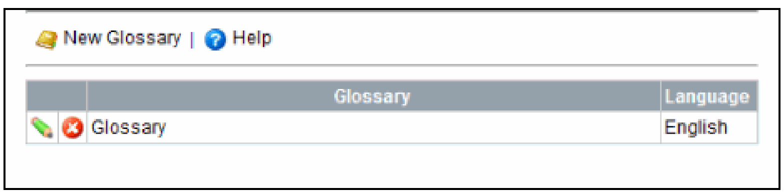


Figure 141 Glossary Management Page

2. Click 

. The **New Glossary** page is displayed.

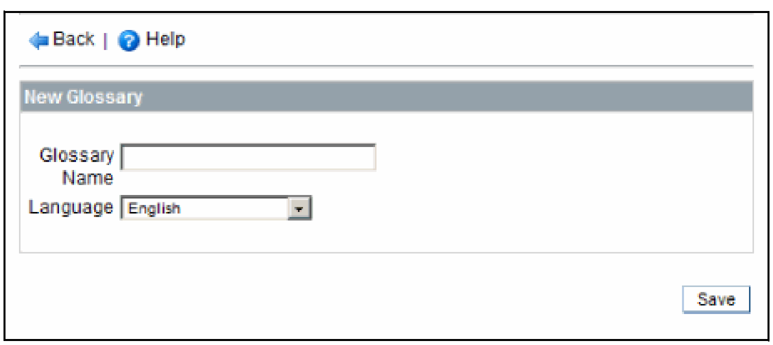


Figure 142 New Glossary Page

3. In the **Glossary Name** field, type a name for the Glossary.
4. Click **Save**. The Glossary is listed on the **Glossary Management** page.

> **Note:**
>
> One or more Glossaries can be enabled for a Portal from the Glossary Options link in the Portal Modules area.
>
> You can create Glossaries associated with HTML text.

Editing the Glossary Name

You can edit a Glossary name.

> **Note:**
>
> You must be granted the **Edit Glossary Item** permission to edit a Glossary.

To Edit a Glossary Name

1. On the **Content** tab, click **Glossary**. The **Glossary Management** page is displayed.
2. On the left of the Glossary name, click . The **Edit Glossary** page is displayed.

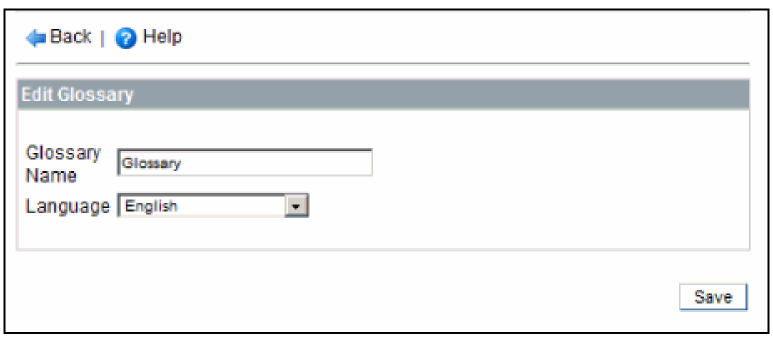


Figure 143 Edit Glossary Page

3. In the **Glossary Name** field, modify the name of the Glossary.
4. Click **Save**.

Deleting the Glossary

You can delete a Glossary.

> **Note:**
>
> You must be granted the **Delete Glossary Item** permission to delete a Glossary.

To Delete a Glossary

1. On the **Content** tab, click **Glossary**. The **Glossary Management** page is displayed.
2. On the left of the Glossary name, click . You are prompted with the following message.

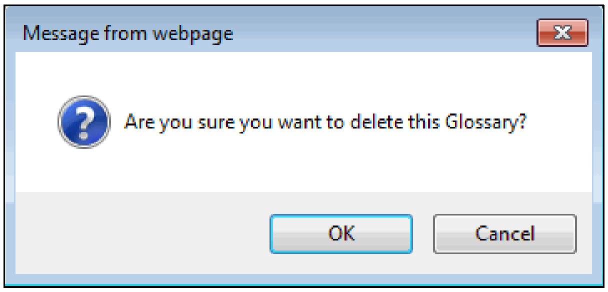


Figure 144 Delete Glossary Window

3. Click **OK**.

Creating a New Glossary Term

You can create new Glossary terms within a Glossary.

To Create a New Glossary Term

> **Note:**
>
> - You must be granted the **Create New Glossary Item** permission to create a new Glossary term.
> - You must have permission to at least one Workflow step to create a Glossary Term.

1. On the **Content** tab, click Glossary. The **Glossary Management** page is displayed.
2. Click the Glossary within which you want to create the Glossary term. The following page is displayed.

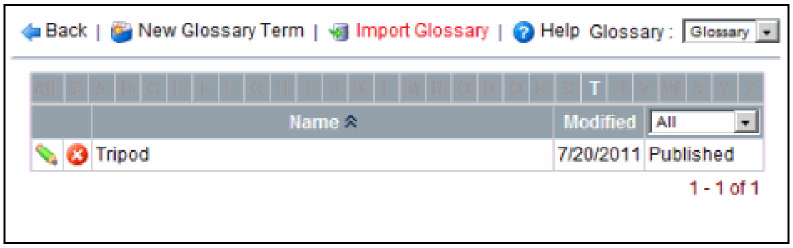


Figure 145 Glossary Terms Management Page

Click New Glossary Term . The **New Glossary Term** page is displayed.

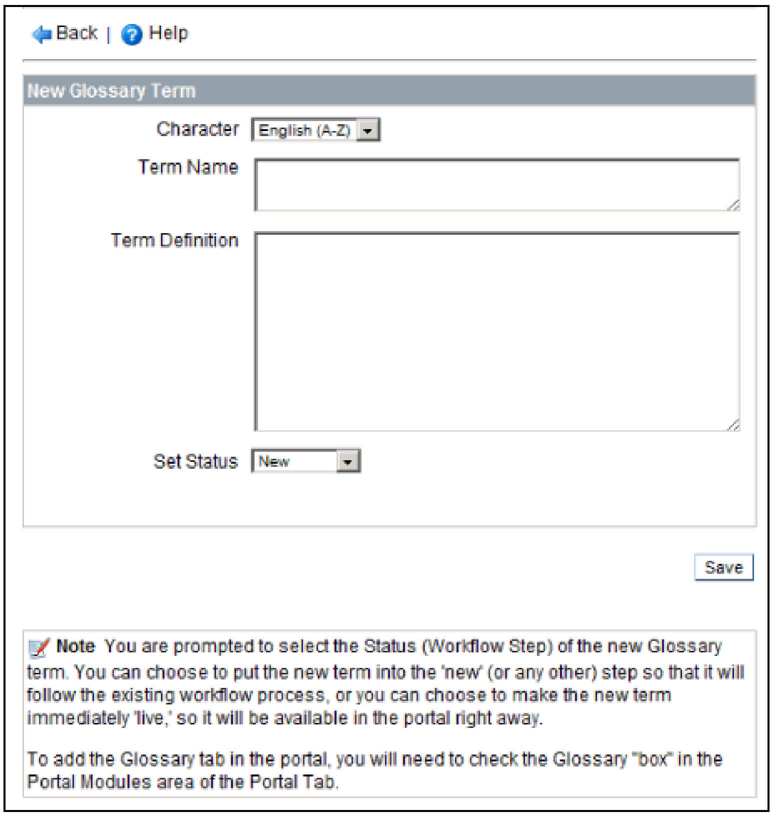


Figure 146 New Glossary Term Page

3. In the **Term Name** field, type a name for the Glossary Term.
4. In the **Term Definition** field, type the term definition, or other data that is associated with the Glossary Term.
5. From the **Set Status** list, select the Workflow step where the new Glossary item must reside.
6. Click **Save**.

Editing a Glossary Term

You can edit a Glossary Term.

> **Note:**
>
> You must be granted the **Edit Glossary Item** permission to edit a Glossary Term.

To Edit a Glossary Term

1. On the **Content** tab, click Glossary. The **Glossary Management** page is displayed.
2. Click the **Glossary** within which you want to edit the Glossary term. The following page is displayed.

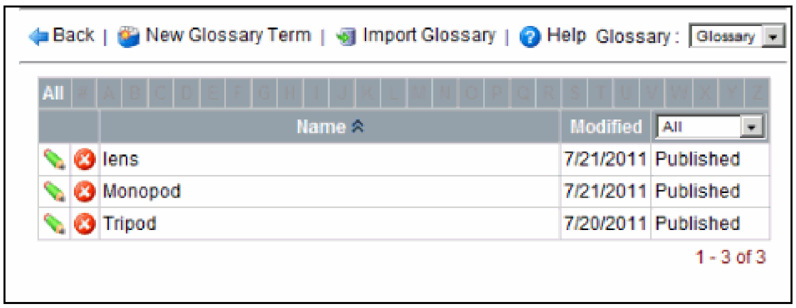


Figure 147 Glossary Term Management Page

3. Click the letter of the Alphabet which contains the term.
4. From the list of Glossary Terms, click the name of the Glossary Term which you want to edit. The **Edit Glossary** page is displayed.

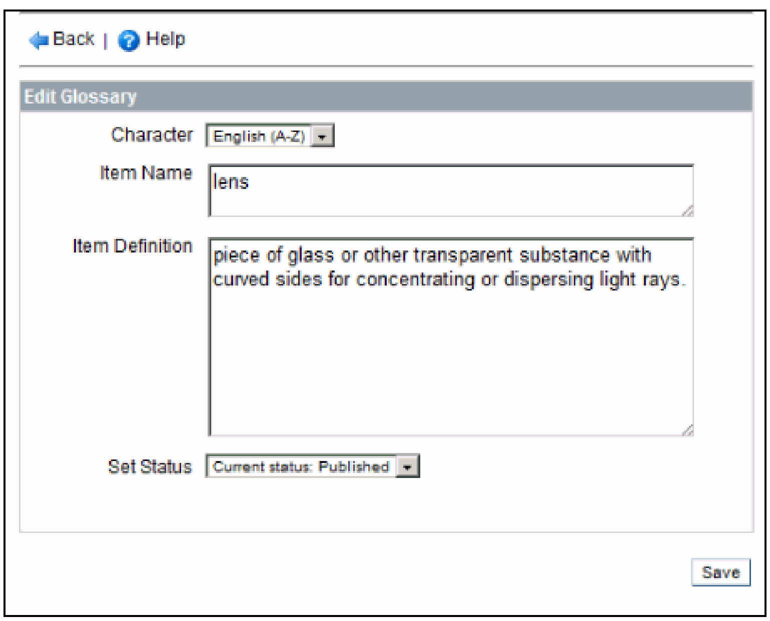


Figure 148 Edit Glossary Term Page

5. In the **Item Name** field, modify the Glossary Term name.
6. In the **Item Definition** field, modify the definition of the Glossary Term.

7. From the **Set Status** list, select the Workflow step where the new Glossary item should appear.
8. Click **Save**.

> **Note:**
>
> Changing the first letter of a Glossary Term name changes where the listing appears.

Changing the Glossary Term Status

The current status is show in the Set Status field of the Glossary term which is displayed below the Item Definition field in the Edit Glossary window. For example, if a term is published in the Glossary, the Published status is displayed in the Edit Glossary window. If you have Workflow permission to approve the Published Workflow step, you can move the term to the next step in the Workflow process.

To Remove a Term from Live Status to the Previous Step

1. On the **Content** tab, click Glossary. The **Glossary Management** page is displayed.
2. Select the **Term** which you want to move to a different Workflow step. The **Edit Glossary Term** page is displayed.

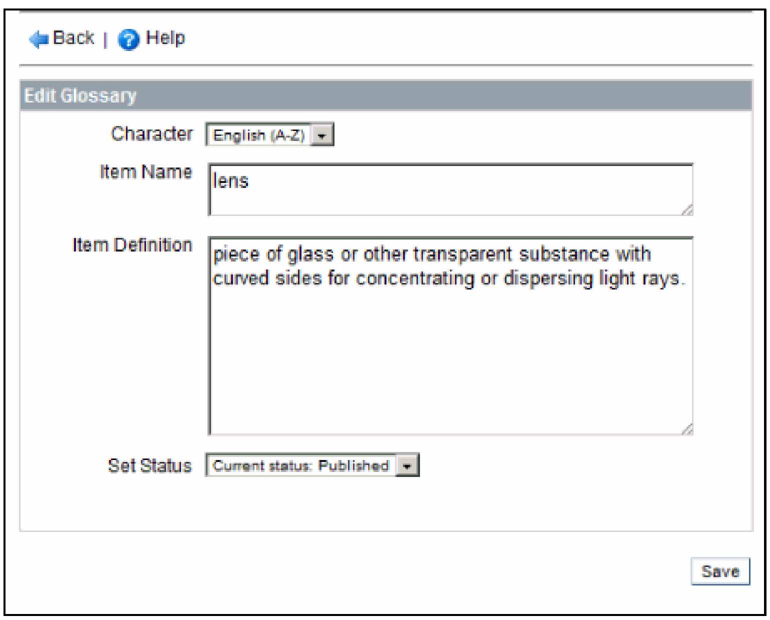


Figure 149 Edit Glossary Term Page

3. Select the appropriate option below the **Current Status Statement** in the **Set Status** list.

4. Click **Save**. The term is moved to the selected step.

> **Note:**
>
> If the status of the Glossary term you are editing is not live, you can approve the term forward depending on your Workflow approval permission settings.

For more information about the Workflow approval process, **see "About Workflow Editor" on page 392**.

Importing a Glossary

Instead of creating individual Glossary terms, you can import multiple Glossary terms into your Glossary. From the Glossary Import area, you can import a file that contains multiple terms.

> **Note:**
>
> Before you import terms into your Glossary, ensure that the following criteria are met:
>
> - The file you are importing must be a text document with a .txt extension.
> - Each term and its definition must be on separate, consecutive lines but may contain HTML formatting.
> - Ensure that there are no blank lines.

Example:

DHCP Server.

Automatically assigns addresses to all workstations on the LAN.

Narrowband.

A term used to describe services including T-1
 or 1.544 Mbps

To Import Glossary Terms

1. On the **Content** tab, click **Glossary.** The **Glossary Management** page is displayed.
2. Select the Glossary Name to which you want to Import Glossary Terms. The **Glossary Terms Management** page is displayed.
3. Click 

. The **Glossary Import** page is displayed.

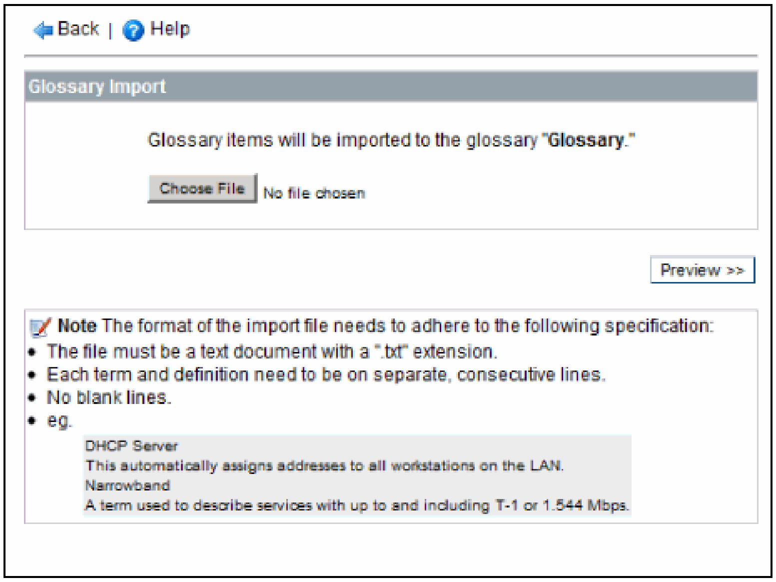
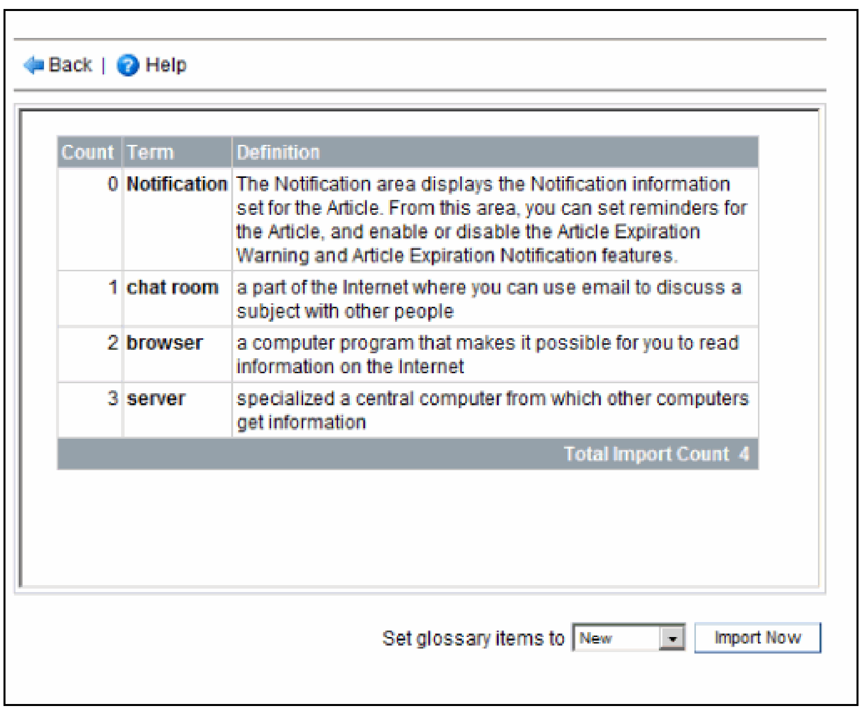


Figure 150 Glossary Import Page

4. Click **Browse** and locate the .txt file which contains the Glossary Terms.
5. Click **Open**. The text file path is displayed in the **Choose File** field.
6. Click **Preview**. The following page is displayed with the Glossary terms imported.



Count	Term	Definition
0	Notification	The Notification area displays the Notification information set for the Article. From this area, you can set reminders for the Article, and enable or disable the Article Expiration Warning and Article Expiration Notification features.
1	chat room	a part of the Internet where you can use email to discuss a subject with other people
2	browser	a computer program that makes it possible for you to read information on the Internet
3	server	specialized a central computer from which other computers get information
		Total Import Count 4

Figure 151 Page Showing the List of Glossary Terms Imported

7. Select the Workflow status of the Glossary Term(s) from the Set glossary items to list.
8. Click **Import Now**. The Glossary terms are imported.

Removing Glossary Items

You can delete Glossary Terms.

> **Note:**
>
> You must be granted the **Delete Glossary Item** permission to delete a Glossary Term.

1. On the **Content** tab, click **Glossary.** The **Glossary Management** page is displayed.
2. Click the Glossary which contains the Term you want to delete. The **Glossary Terms Management** page is displayed.
3. Click the letter of the Alphabet which contains the Term you want to delete.
4. Click to the left of the Glossary Term which you want to delete. You are prompted with the following message.

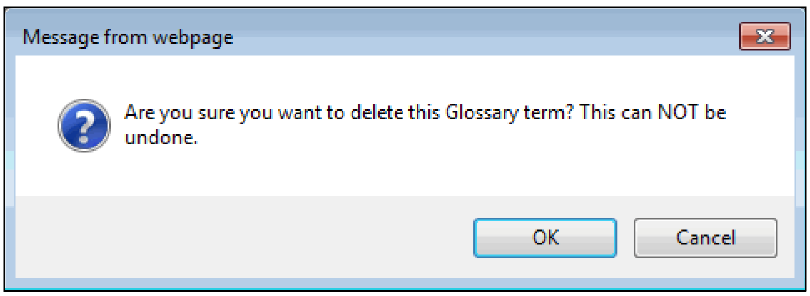


Figure 152 Delete Glossary Term(s) Window

5. Click **OK**.

   Click **Cancel** to cancel the operation.

Article Attributes

This chapter provides detailed information about Article Attributes in Knowledge Spaces™ Admin Control Panel.

About Article Attributes

Article Attributes enable you to create and assign Attributes that can be displayed with the Articles in your KB Portals. Using the Article Attributes area in the Content tab, you can create Attributes, Sub-Attributes, and add Articles to the various Attribute selections.

When configured, the Article Attributes are displayed with the Articles in the Portal search results, and the Portal Category listings.

The Attributes are not factored into the search function. They are intended to provide additional information (product, type, etc.) when displayed with the Article lists in the Portal.

Note:

You must be granted the **Article Attribute** permission to manage the Article attributes displayed with the Articles on the KB Portal.

Example:

You have an Attribute Category called Computer Operating Systems, with three Sub-Attributes: Windows, Macintosh, and Linux. If an Article pertains to Windows, you can add the Article to the Windows Sub-Attribute Category. When the Article is displayed in the Portal, the Attributes line contains Windows, designating the Article to a Windows issue, or topic.

You can also add Articles to multiple Sub-Attributes. When an Article is displayed in the Portal, all the associated Sub-Attributes are listed with the Article in hierarchy.

Using Article Attributes

From the Article Attributes section in the Content tab, you can create Article Attributes, and Sub-Attributes or Child Attributes.

Figure 153 Article Attributes Page

The left frame of the Article Attributes page lists the current Attribute structure. When you click an Attribute, the Attribute structure expands, and displays its Sub-Attributes in hierarchical order.

When you click an Attribute, two additional frames are displayed on the Article Attribute page. The top right frame displays a list of existing Articles that have been added to this Attribute. The bottom right frame displays a list of Articles that are categorized by Knowledge Base, with an option to add the Articles to a selected Attribute.

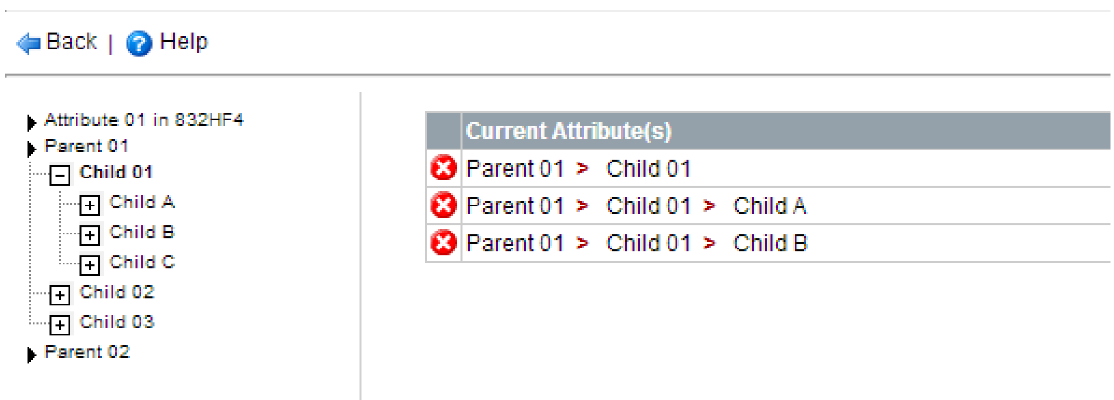


Figure 154 Article Attributes Page Showing the Articles Added to an Attribute in hierarchy

Creating an Attribute

You can create a new Attribute.

> **Note:**
>
> You must be granted the Create New Attribute permission to create a new Attribute.

To Create a New Attribute

1. In the **Content** tab, click **Article Attributes**. The **Article Attributes** page is displayed.
2. Click 

. The **Create New Attribute** window is displayed.

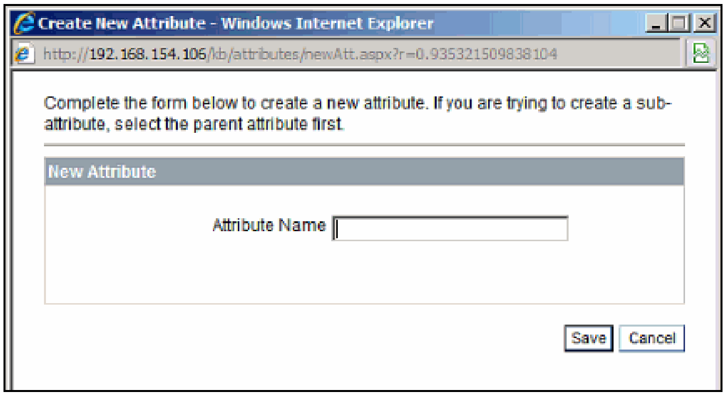


Figure 155 Create New Attribute Window

3. In the **Attribute Name** field, type the name for the Attribute.
4. Click **Save.** The new top-level Attribute is created, and appears in the Attribute tree structure.

   Click **Cancel** to cancel the operation.

Creating a New Sub-Attribute

You can create a new Sub-Attribute.

> **Note:**
>
> You must be granted the **Create New Attribute** permission to create a new Sub-Attribute.

To Create a New Sub-Attribute

1. On the **Content** tab, click **Article Attributes**. The **Article Attributes** page is displayed.
2. Select the appropriate Attribute within which you want to create a new Sub-Attribute.
3. Click New Sub-Attribute .The **Create New Attribute** window is displayed.

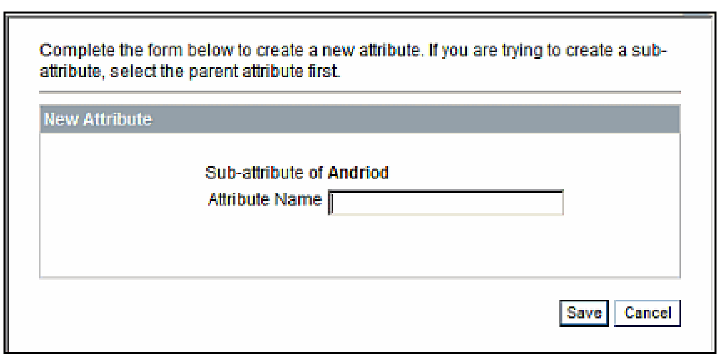


Figure 156 Creating a Sub Attribute

4. In the **Attribute Name** field, type the Sub-Attribute name.
5. Click **Save**. The new Sub-Attribute is created, and is displayed in the Attribute tree structure.

Click **Cancel** if you want to cancel the operation.

Editing or Deleting an Attribute

You can edit, and delete the Attributes created in Knowledge Spaces.

> **Note:**
>
> You must be granted the **Edit Attribute** permission to modify an Attribute.

To Edit an Attribute

1. On the **Content** tab, click **Article Attributes**. The **Article Attributes** page is displayed.
2. From the tree structure in the left frame of the Article Attributes main page, select the name of the Attribute you want to modify. The Attribute name is displayed on the top right frame.

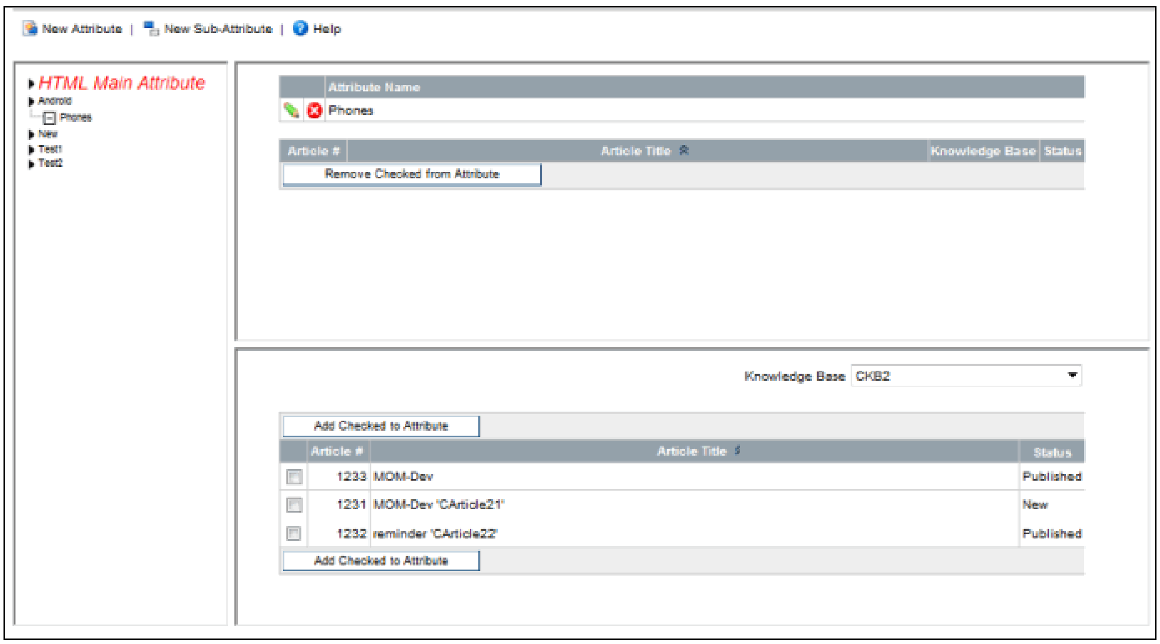


Figure 157 Article Attribute Page Showing the Properties of An Attribute

3. Click to the left of the Attribute name. The **Edit Attribute** window is displayed.

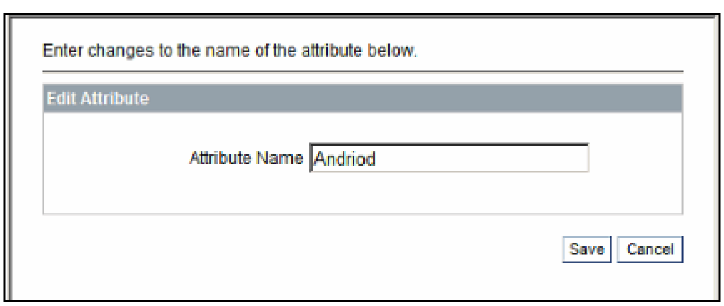


Figure 158 Edit Attribute Window

4. In the **Attribute Name** field, change or edit the Attribute name.
5. Click **Save**. The changes appear in the Attribute tree structure.

   Click **Cancel** to cancel the operation.

To Delete an Attribute

You can delete an Attribute from the Attribute tree structure.

1. On the **Content** tab, click **Article Attributes**. The **Article Attributes** page is displayed.

> **Note:**
>
> You must be granted the **Delete Attribute** permission to delete an Attribute Category.

2. From the tree structure in the left frame of the Article Attributes page, select the Attribute that you want to delete. The Attribute name is displayed on the top right frame.
3. Click next to the Attribute name. You are prompted with the following message.

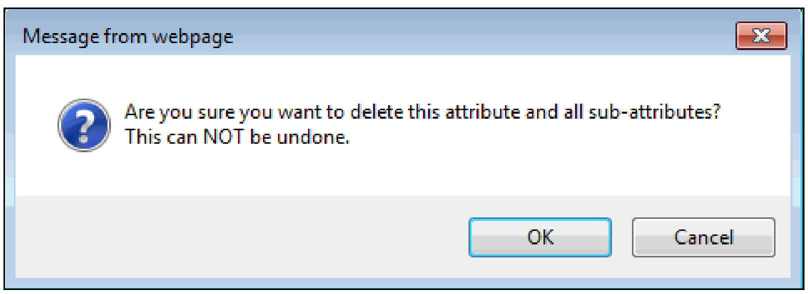


Figure 159 Delete Attribute Window

4. Click **OK**.

   Click **Cancel** to cancel the operation.

Adding Articles to Sub-Attributes

You can add or remove Articles from Sub-Attributes.

To Add Articles to a Sub-Attribute

1. On the **Content** tab, click **Article Attributes.** The **Article Attributes** page is displayed.
2. In the left frame of the **Article Attributes** page, select the appropriate Sub-Attribute. Two frames are displayed on the right of the page.

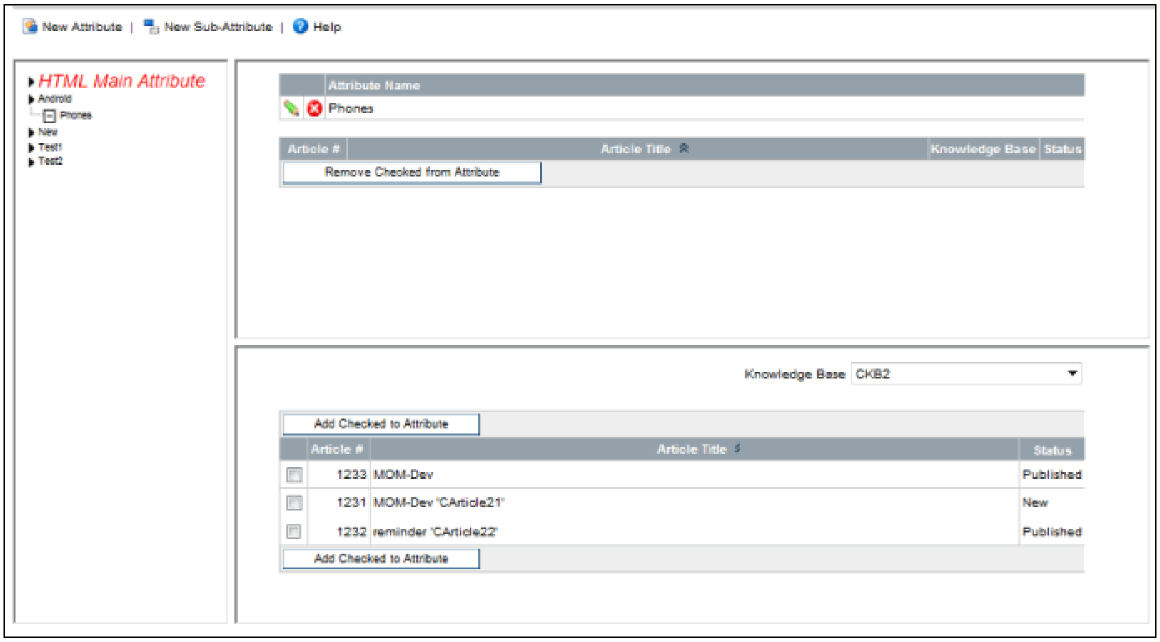


Figure 160 Article Attributes Page - Articles Associated with a Sub Attribute

- The top frame displays the existing Articles in the selected Sub-Attribute.
- The bottom frame displays a list of Articles by Knowledge Base and that are not associated with the Sub-Attribute Category.

3. From the Knowledge Base list in the bottom frame, select the Knowledge Base where the Article you want exists. A list of Articles in the selected Knowledge Base is displayed.

   You can sort the articles by Article ID, Article Title, or by Workflow Status.
4. Select the Articles that you want to add to the Sub-Attribute.
5. At the top of the frame, click **Add Checked to Attribute**. The Articles selected are added to the Sub-Attribute, and the Articles have the correct Attribute listings in the Portal display.

> **Note:**
>
> Clicking the Article name displays the Article Properties page for that Article. For each Article, you can add Sub-Attributes using the Add Attribute option from the Add New Property drop-down on the Article Properties page.

Removing Articles from Sub-Attributes

You can remove Articles from Sub-Attributes.

To Remove Articles from a Sub-Attribute

1. On the **Content** tab, click **Article Attributes**. The **Article Attributes** page is displayed.
2. In the left frame of the Article Attributes page, select the appropriate Sub-Attribute. Click the **Attribute Category**. Two frames are displayed on the right of the page.

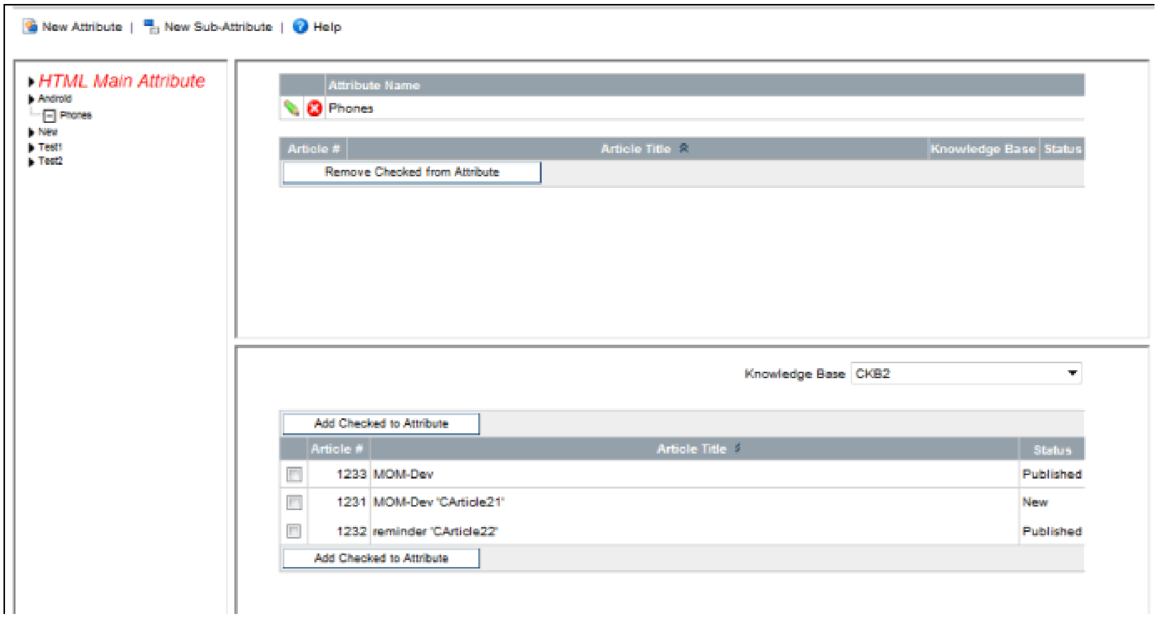


Figure 161 Article Attributes Page - Articles in a Selected Sub-Attribute

3. Select the Article(s) that you want to remove.
4. At the bottom of the frame, click **Remove Checked** from Attribute.
5. Click **Save**.

   Click **Cancel** to cancel the operation.

Article Subscription

This section provides detailed information about Article Subscription in Knowledge Spaces™ Admin Control Panel.

About Article Subscription

A Portal User can subscribe to Articles and then be notified by email when the Article is modified. When the User is viewing the Article, the User can select the Subscribe option, and, specify an email address to subscribe to the Article. A User can also unsubscribe from an Article to which the User had previously subscribed.

You can enable the Subscription for a particular Portal from the Portal Customization area in the Portal tab.

Article subscription can be enabled when the Article is created, and from the Article Properties area after the Article is created.

> **Note:**
>
> You must be granted the **Article Subscription** permission to access the Article Subscription option in Knowledge Spaces™ Admin Control Panel.

The Article Subscription Home Page

Click **Article Subscription** on the **Content** tab, the **Article Subscription** page is displayed.

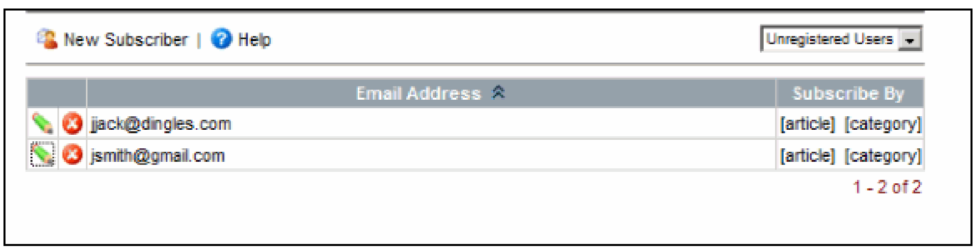


Figure 162 Article Subscription Home Page

From the Article Subscription section on the **Content** tab, you can create New Subscribers, manually Subscribe and Unsubscribe Articles to Subscribers, and add Categories to the Subscribers.

Creating a New Subscriber

You can create a New Subscriber.

> **Note:**
>
> You must be granted the **Add Article Subscription** permission to create a new Subscriber.

To Create a New Subscriber

1. From the **Content** tab, click **Article Subscription**. The **Article Subscription** page is displayed.

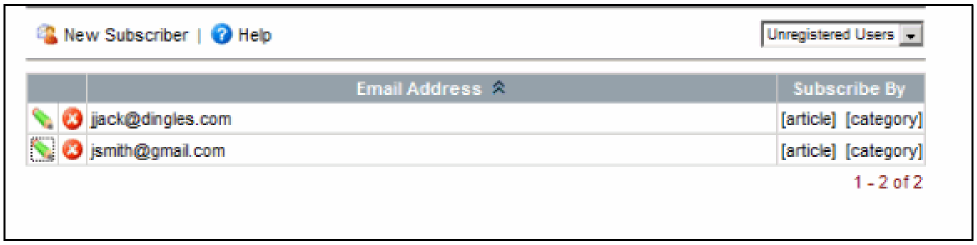


Figure 163 Article Subscription Home Page

2. Click . The **New Subscriber** window is displayed.

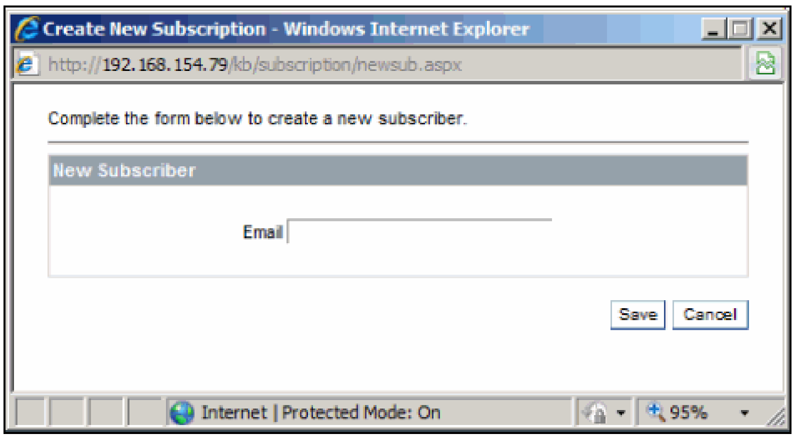


Figure 164 New Subscriber Window

3. In the **Email** field, type the email address of the Subscriber.
4. Click **Save.** The Email Address of the Subscriber is displayed on the Article Subscription page.
   Click **Cancel** to cancel the operation.

Note:

- The New Subscriber created by the KB Administrator is displayed on the Article Subscription page as an Unregistered User.
- After an External User uses the Subscribe or Unsubscribe feature, the Email address of the User will be displayed on the Article Subscription page as an external user.
- On the Article Subscription page, select Unregistered Users from the drop-down box in the upper right corner to view the Email addresses of Subscribers added by the KB Administrator.
- On the Article Subscription main page, select external users from the drop-down box in the upper right corner to view the Email addresses of Subscribers who have subscribed for the Articles from the Portal.

Enabling Article Subscription for a Portal

You can enable Article subscription for a Portal from the Portal Customization area in the Portal tab. When Article Subscription is selected, the Subscribe icon is displayed in the Portal with the Articles for which subscription is enabled. Portal users can click the icon and specify the Email address to subscribe for the Article.

To Enable Article Subscription for a Portal

1. From the **Portal** tab, click the Portal link for which you want to enable the Article Subscription option. The **Portal Configurations** page is displayed.

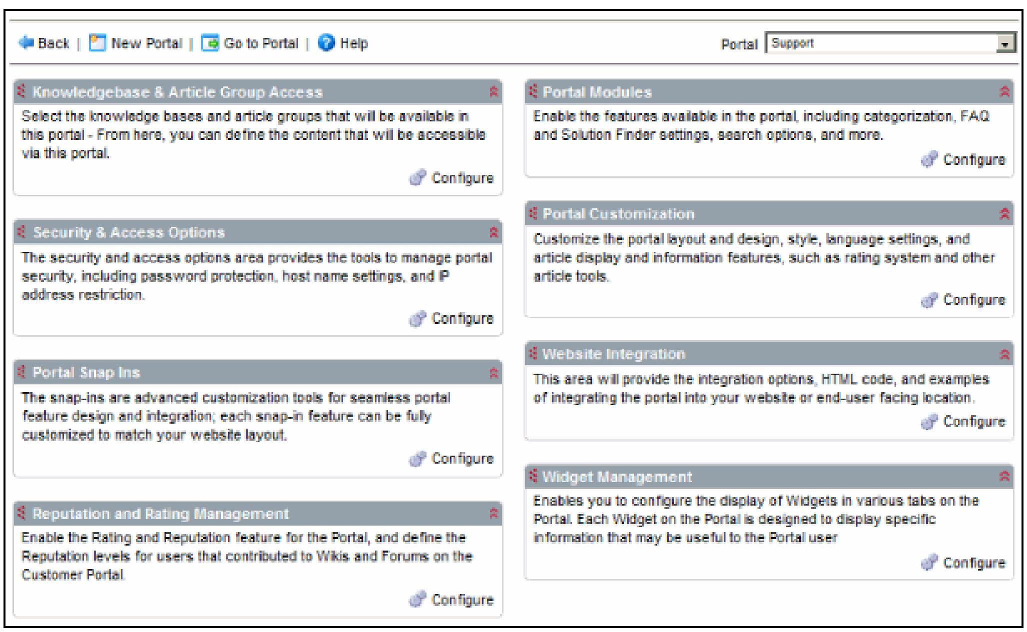


Figure 165 Portal Configurations Page

2. Click **Configure** in the Portal Customization area. The **Portal Customization** options page is displayed.

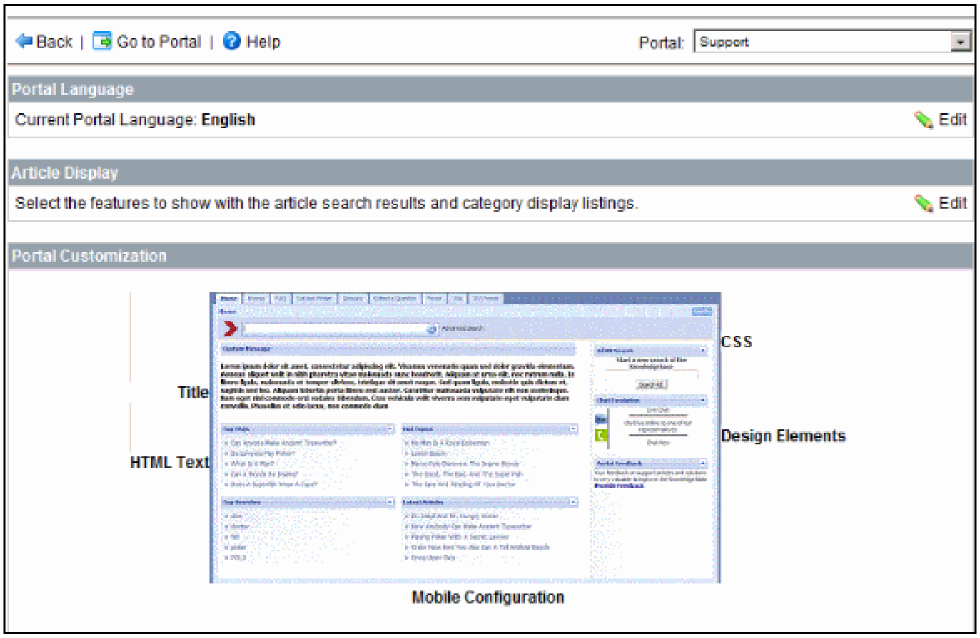


Figure 166 Portal Customizations Options Page

3. Click  in the Article Display area. The **Article Display Configuration** page is displayed.

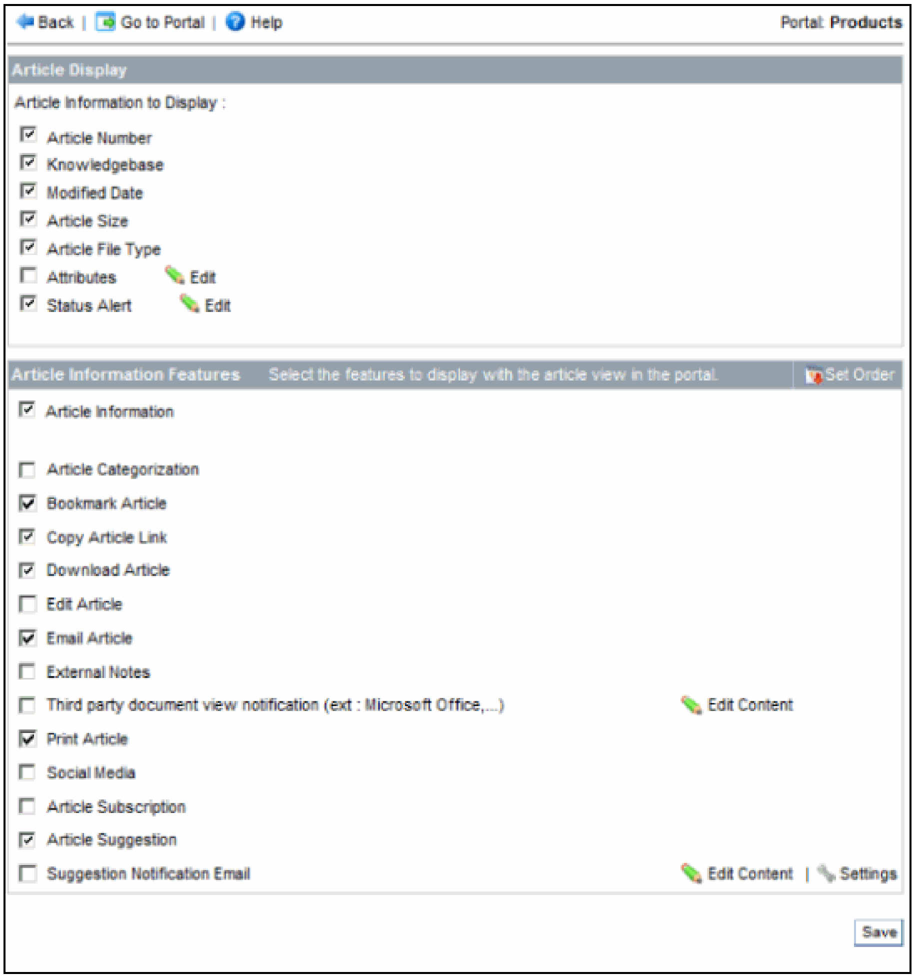


Figure 167 Article Display Configuration Page

4. In the **Article Information Features** area, select the **Article Subscription** option.
5. Click **Save**.

Subscribing or Unsubscribing Articles to Users

In addition to the Article Subscriptions that can be done by the users from a Portal, a Knowledge Spaces™ Administrator User can manually subscribe, and unsubscribe Articles to users from the Article Subscription area in the Contents tab.

To Subscribe or Unsubscribe Articles to Users

1. From the **Content** tab, click **Article Subscription**. The **Article Subscription** page is displayed.

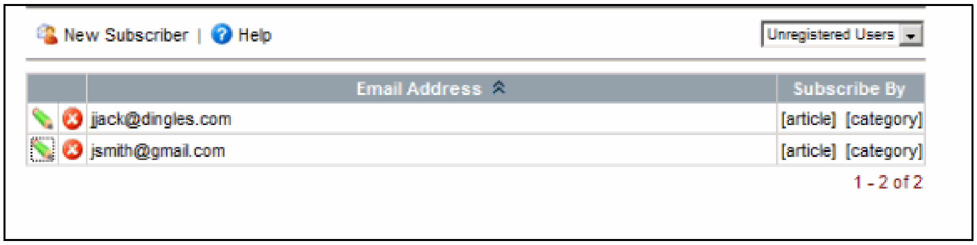


Figure 168 Article Subscription Page

2. Click Article link next to the Email address of the user for whom you want to Subscribe, or Unsubscribe Articles. The **Current Subscription List** page is displayed.

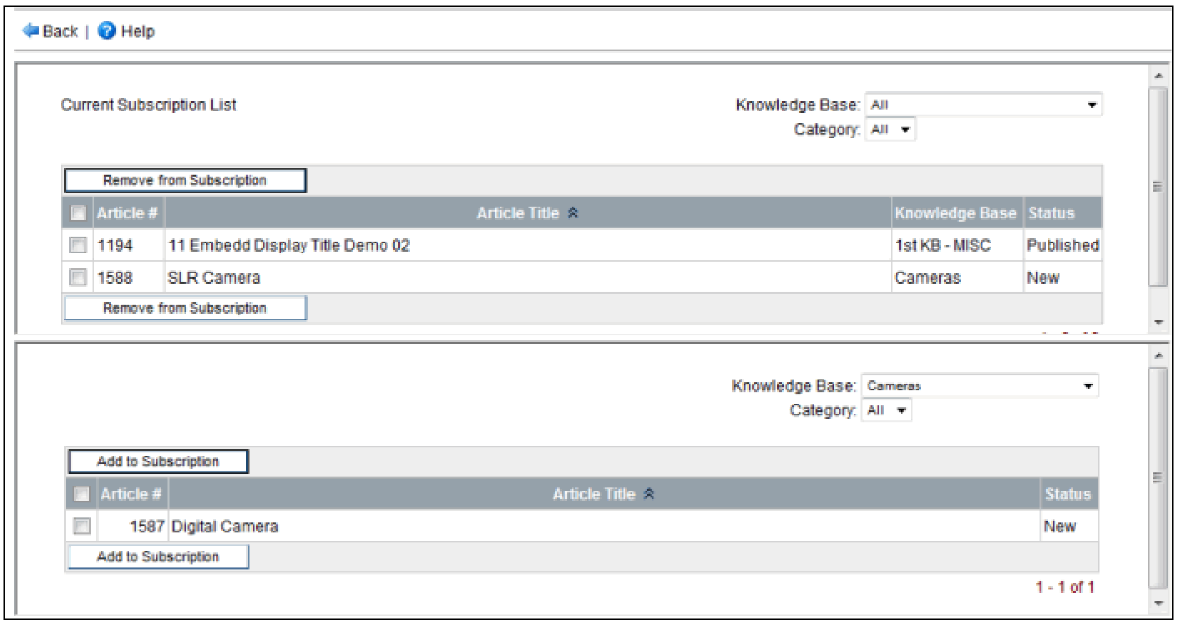


Figure 169 Current Subscription List Page

3. In the **Current Subscription List** area, select the Knowledge Base or the Category in which the Article to be Unsubscribed is present.
4. Select the check box next to the Article Id and click **Remove from Subscription**.
5. From the bottom frame select the Knowledge Base, or the Category in which the Article to be subscribed is present.
6. Select the check box next to the Article Id, and click **Add to Subscription**.

Note:

You can enable Subscription for individual Articles from the **Article Management** area in the **Content** tab. Click **Article** title. The Article Properties page is displayed. Use the **Add New Property** icon to enable Subscription for the Article that you are working.

To add an Article subscription while creating a new Article, see Chapter 2 "".

Note:

The Knowledge Spaces™ Admin Control Panel Administrator User can enable the Subscription option for various Knowledge Bases from the Email Administration section of the Administration tab. When an Article is updated, an E-mail is sent out to Subscribers. The Knowledge Spaces™ Admin Control Panel Administrator User can also customize the template that is mailed to the Users. In order for the subscription E-mail messages to be sent, the notification must be enabled for the Knowledge Base from this section.

When an author modifies an Article, the author can click the **Notify Subscribers** link on the Article Properties page to notify the Subscribers about the changed Article. This option is provided, as minor modifications may not require notifying the Subscriber base. For example changes in formatting, or punctuation rarely require notification.

Category Subscription

The Category Subscription enables Portal Users to receive notification when any Article in a given Category is updated. This option is managed from the Article Subscription section on the Content tab, and cannot be subscribed to from Spaces by Moxie™ - Knowledge Spaces™ Customer Portal Customer Portal.

To add Categories to a Subscriber

1. From the **Content** tab, click **Article Subscription**. The Article Subscription page is displayed.

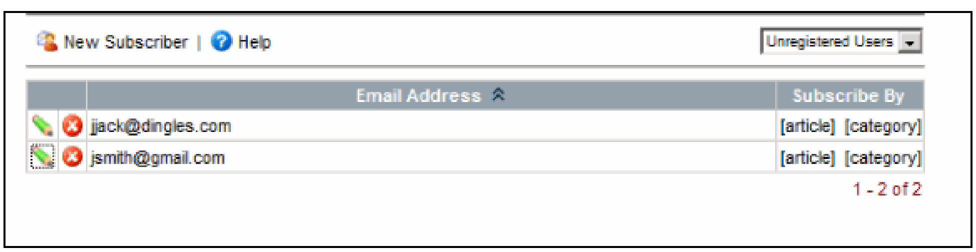


Figure 170 Article Subscription Home Page

2. Click Category link next to the Email address of the User for whom you want to add a Category. The **Current Categories** page is displayed.

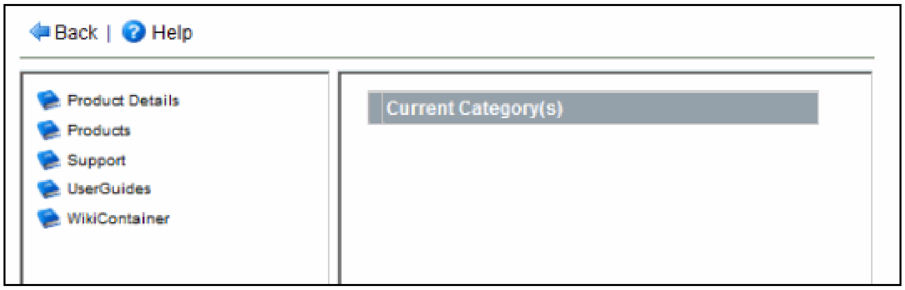
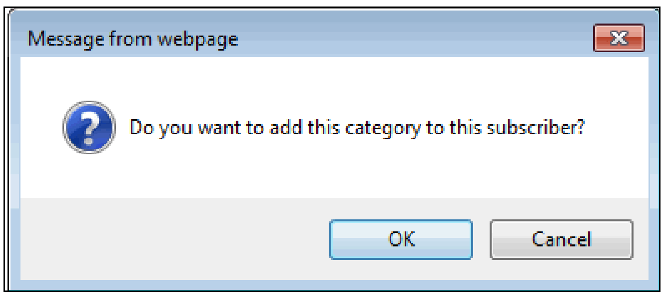


Figure 171 Categories List Page

3. Select the Category to be added. The following message is displayed



4. Add Category to the Subscriber Message Box
5. Click **OK**. The Category is added in the Current Category(ies) list

Global Replace

This section provides detailed information about the Global Replace functionality in Knowledge Spaces™ Admin Control Panel.

About Global Replace

Global Find and Replace is a powerful tool for managing change on a large scale. There are a number of possible uses.

For example, assume your company's Toll Free 800 number changes and it is prominent in many articles. After performing a search in your content, you identify 50 articles with the 800 number. Rather than checking each article out, edit it, and check it back in, you can use the Global Replace function.

Notes:

You must be granted the **Global Replace** permission to access the Global Replace functionality in Knowledge Spaces™ Admin Control Panel.

Global Replace functionality is applicable only for the published Articles.

Using Global Find and Replace

1. On the **Content** page, click **Global Replace.** The **Global Replace** page is displayed

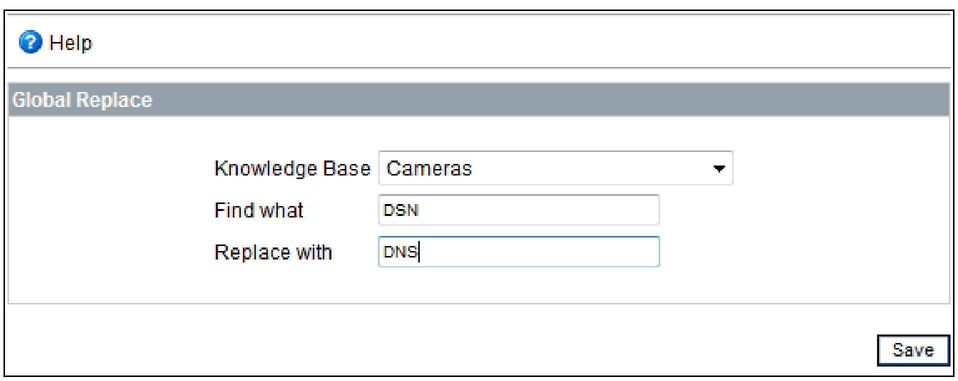


Figure 172 Global Replace Home Page

2. Select the appropriate Knowledge Base from the Knowledge Base list.
3. In the **Find what** field, type the term(s) you want to replace.
4. In the **Replace with field**, type the new term(s).
5. Click **Save**.

   The Global Replace action will be completed within 24 hours.

Note:

There is one limitation of Global Replace. Global Replace only works on Inherent HTML Articles. In other words, Global Replace only affects Articles created using the online editor, or that which were uploaded as HTML files.

The Global Replace functionality in Knowledge Spaces™ Admin Control Panel is driven by a Scheduled task, and the change is not immediate.

Chapter 3: Portal Management

This chapter provides you with detailed information about Managing Customer Portal in Spaces by Moxie™ Knowledge Spaces™.

In this chapter

About Managing Knowledge Spaces Customer Portal

Spaces by Moxie™ - Knowledge Spaces™ Customer Portal is the window to your Knowledge Base. A User accessing your Knowledge Base from a public web site, or an employee accessing an employee Knowledge Base over the intranet, connects to the intranet, uses the KB Portal to search a Knowledge Base.

Knowledge Spaces™ 9.4 includes a new portal. The portal has new widgets, branding capabilities, and provides a user-friendly experience for searching, browsing, and finding answers quickly with Solution Finders. For information on how to setup and administer the new portal, refer to http://kb94.moxiesoft.com

> **Note**
>
> The information in this guide is relevant to the legacy portals (old portals) only.

The KB Portal can be displayed in a popup browser window, or can be integrated directly with the HTML pages of your web site or corporate intranet. It can be displayed as a search window, or a direct link to Knowledge Base Articles. The Portal tab in Knowledge Spaces™ Admin Control Panel enables you to create your Portals, customize the login areas, decide on Portal features, and set access restrictions.

You can perform the following operations in the Portal tab:

- Create, and manage Portals
- Create External Users, and modify information about them.
- Create External User Departments
- Create, and configure External Access Profiles.
- View the Registration log.
- Configure Remote Site Search.
- Configure Remote Files Search
- Configure Remote DB Search
- AdManager

> **Note:**
>
> - The Remote Database Search, RSS Feeds, and Wiki features are not available for the **Portal Style #1**, **Portal Style #2**, or **Portal Style #3** portals.
> - The functionality of Forums has been modified for Portals designed using Portal Style #4. For information about the Forums in **Portal Style #4**, see **Spaces by Moxie™ Knowledge Spaces™ 9.4 Customer Portal guide**.

Click the **Portal** tab. A list of Portals available is displayed.

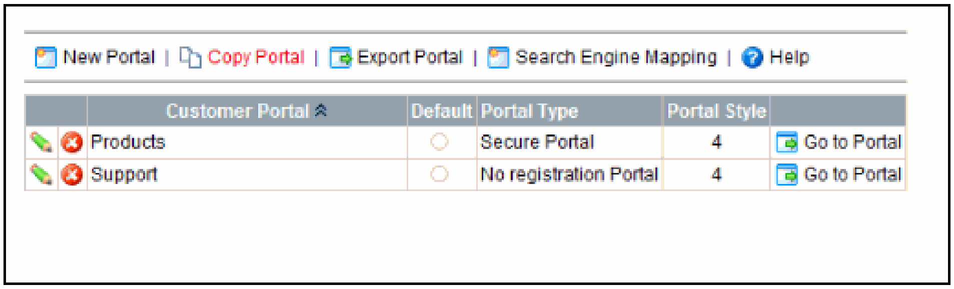


Figure 173 Portals Home Page

From the list of Portals, you can select a default Portal. Select the check box next to the Portal that you want to set as default in the **Default** column. The default portal is presented to the users who attempt to access a KB portal using the base DNS. For example, http://yourkbportal.companydomain.com.

While installing Knowledge Spaces™ Admin Control Panel, you must have the Portal server IP address. You can type the IP address of the default Portal in the Address bar of the browser to access the Portal. This enables Knowledge Spaces™ Users to access the Portal easily.

You can create DNS entries that link directly to the Portal, instead of using the entire Portal URL string. The IP address of the default Portal can be used directly in a Web page without creating an embedded frame in the Web page to mask the URL string.

In the **Security and Access Options** area, you can also add DNS host names to point to any Portal, so the Portal URL can be customized to specific domain names.

Notes:

- Only one Portal can be set as the Default Portal.
- In the **Host Name** section of the Portal **Security & Access Options** page, you can add additional DNS names that point to various KB Portals.
- You must be granted the **Portal Admin** permission to manage KB Portals in Knowledge Spaces™.
- Moxie Software™ does not provide support or assistance with CSS or JavaScript in Portal customization areas, widgets, or HTML Article Templates. Inclusion of any custom CSS or JavaScript code and maintenance or troubleshooting of custom code becomes the sole responsibility of the customer.

Creating a KB Portal

The **New Portal** page enables you to create KB Portals. The Properties page of the Portal enables you to configure several Portal options.

> **Note:**
>
> You must be granted the **Create New Customer Portal** permission to create a KB Portal.

To Create a New Portal

1. On the Portal page, click 

. The **New Portal** page is displayed.

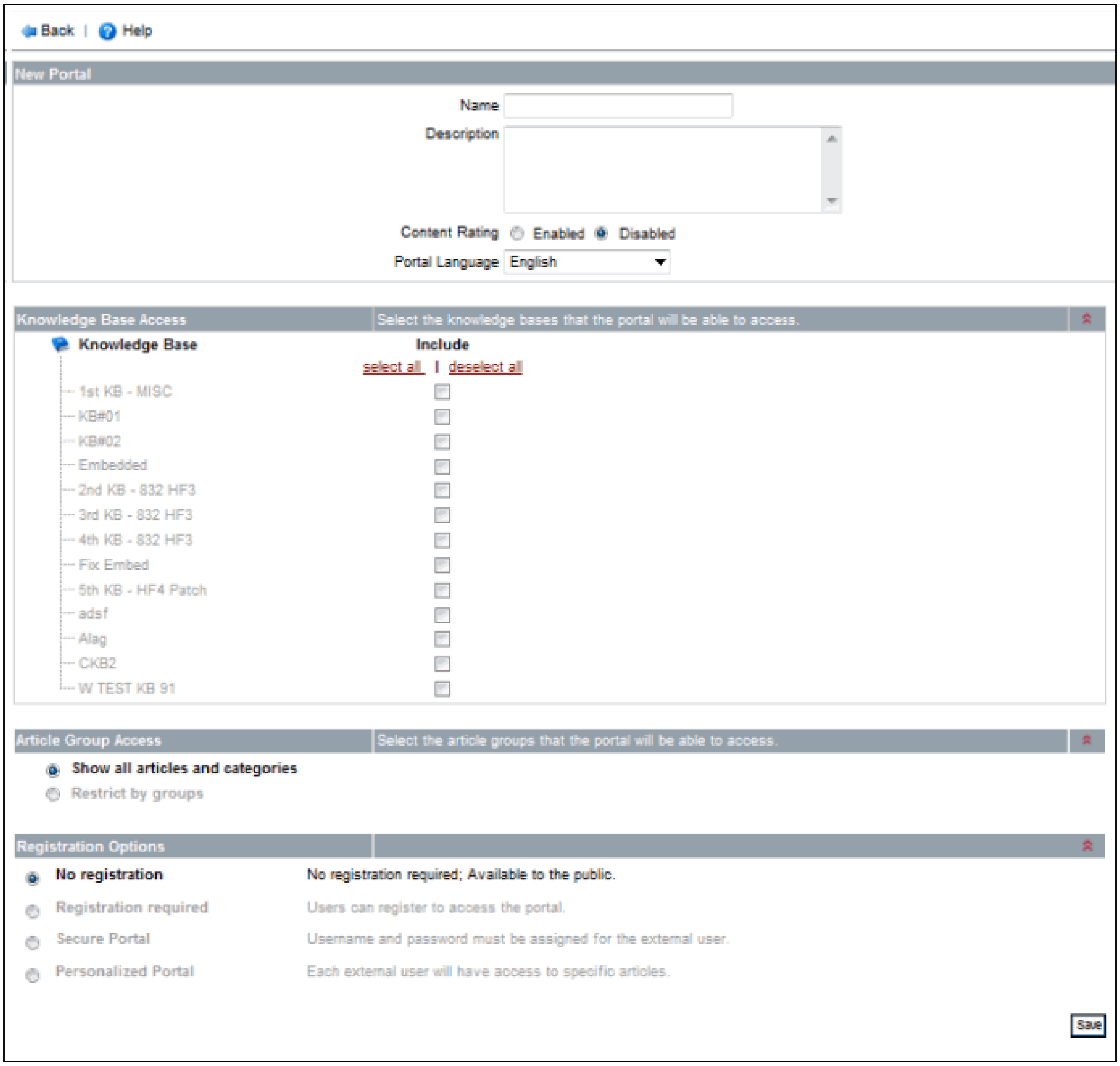


Figure 174 New Portal Page

2. In the **Name** field, type the name for the Portal.
3. In the **Description** field, type the description for the Portal. This field is optional.
4. Select **Enabled** next to the Content Rating option to enable the users on the Portal to rate the Portal content.
5. Select **Enabled** next to the Display Reputation option to enable the Reputation feature for the Portal.
6. From the **Portal Language** list select the language in which you want the Portal to be displayed.
7. From the **Knowledge Spaces Access** section select the Knowledge Spaces you want to associate with the Portal. For more information, see **"Knowledge Base and Article Group Access" on page 181**.
8. From the **Article Group Access** section, select the **Restrict by groups** option if you want to restrict the Article Groups that can be accessible on the KB Portal. For more information, see **"Configuring Article Group and Category Access" on page 182**.
9. From the **Registration Options** section, select the required **Registation Option** for the Portal.

10. Click **Save**. The new Portal is created.

Renaming a Portal

You can edit the name of the Portal.

> **Note:**
>
> You must be granted the **Edit Customer Portal** permission to edit the name of a KB Portal.

To Rename a Portal

1. On the **Portal** page, click next to the Portal you want to rename. The **Edit Portal** page is displayed.

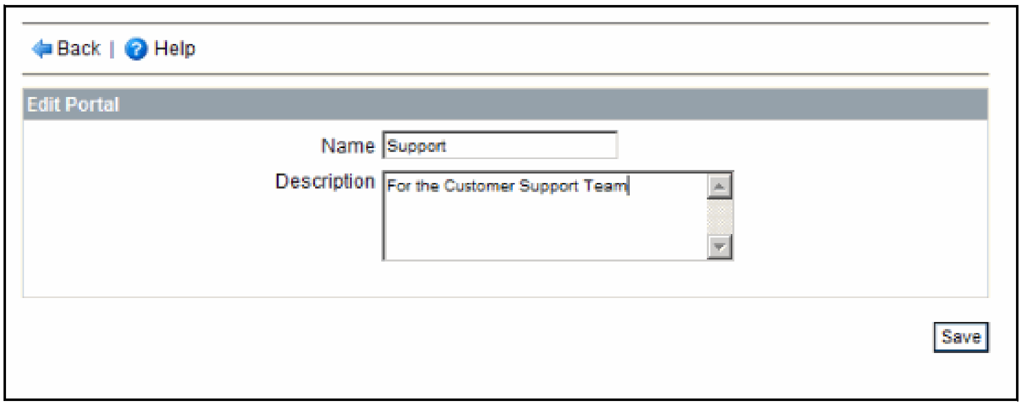


Figure 175 Edit Portal Page

2. In the **Name** field, specify the new name of the Portal.
3. In the **Description** field, type the description of the Portal. This field is optional.
4. Click **Save**.

Deleting a Portal

You can delete a Portal.

> **Note**
>
> You must be granted the **Delete Customer Portal** permission to delete a KB Portal.

To delete a Portal

1. On the Portal page, click next to the Portal you want to delete. You are prompted to confirm the deletion.

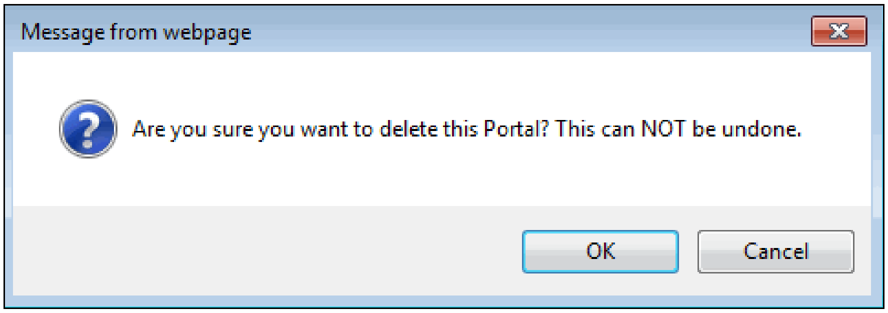


Figure 176 Delete Portal Window

2. Click **OK**. The Portal is deleted.

Portal Properties

The Portal Properties page enables you to configure various aspects for a Portal such as **Portal Modules, Snap ins**, **Web Site Integration**, **Knowledge Base and Article Group Access**, **Security and Access Options**, **Portal Customization**, **Reputation and Rating Managment**, and **Widget Management**.

Click the name link of a Portal to view its Properties page. The Portal Properties page is also displayed when you click **Save** after creating a new Portal, or renaming a Portal.

The Portal Properties Page comprises the following sections:

- Knowledge Base & Article Group Access
- Security & Access Options
- Portal Snap Ins
- Portal Modules
- Portal Customization
- Website Integration
- Reputation and Rating Management
- Widget Management

> **Note:**
>
> The **Reputation and Rating Management**, and **Widget Management** features are not available for the **Portal Style #1**, **Portal Style #2**, or Portal Style #3 portals.

Click 

in the section you want to configure.

The following topics describe the various configurations that can be done in the **Portal Properties** page.

Knowledge Base and Article Group Access

The **Knowledge Base and Article Group Access** setting determines which of your Knowledge Bases can be accessed through the KB Portal. You can also restrict access to specific Article Groups.

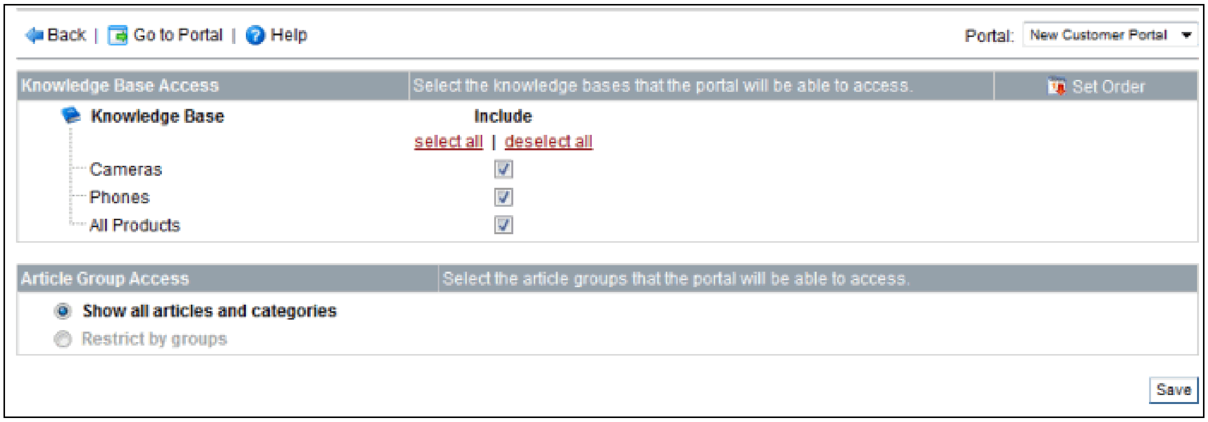


Figure 177 Knowledge Base And Article Group Access Page

A list of the current Knowledge Bases is displayed under the Knowledge Base.

To add a Knowledge Base to the Portal, select the check box next to the Knowledge Base in the **Include** column. Click **Save**.

When Users access, or login to the Knowledge Base using this Portal, they will be able to search and view the Knowledge Bases, including the Categories and Articles within the Knowledge Bases that you select in this section.

Example

You have set up two different Knowledge Bases in the Knowledge Base section of Knowledge Spaces™ Admin Control Panel, called **Public**, and **Private**. The **Public** Knowledge Base is for use by visitors to your web site. The **Private** Knowledge Base is only for your company's employees. Select the check box next to the Public Knowledge Base to make it accessible to visitors to your Web site.

Modifying the Order of Knowledge Bases

By default, Knowledge Bases in a Portal are arranged in alphabetical order. You can modify the order in which they are displayed.

To Modify the Order of the Knowledge Bases

1. On the **Knowledge Base And Article Group Access** page, click Set Order**.** The Knowledge Bases you selected for the Portal are displayed.
2. Modify the order of the Knowledge Bases in the **Order** column.
3. Click **Save**.

Configuring Article Group and Category Access

If you have created Article Groups, you can restrict the Article Groups that can be accessible in the KB Portal.

To Configure Article Group Access

1. On the **Knowledge Base and Article Group Access** page, Select the **Show all articles and categories** option to enable Users to access all Articles and Groups.
2. To restrict access to certain Article Groups, select the **Restrict by groups** option. In the list of Article Groups that is displayed, select the check box(es) next to the appropriate Article Group(s).
3. You can enable **Article Template Body Security** to restrict access within Articles created online by limiting which portions of the Article will appear in the Portal.

> **Note:**
>
> The Article synopsis displayed on the **Portal Search Results** page is filtered based on the Article body configured for the User's profile.

4. Click **Save**.

Security and Access Options

The **Security and Access Options** section enables you to manage Portal security, including Password protection, host name settings, and IP address restriction.

> **Note:**
>
> **Knowledge Base and Article Group Access** settings are independent of **Security and Access** Options, however they can be configured to work cooperatively. For example, you can have a Secure Portal that has access to only certain Knowledge Bases and Article Groups.

Registration Options comprise the following types:

- No registration
- Registration required
- Secure Portal
- Personalized Portal

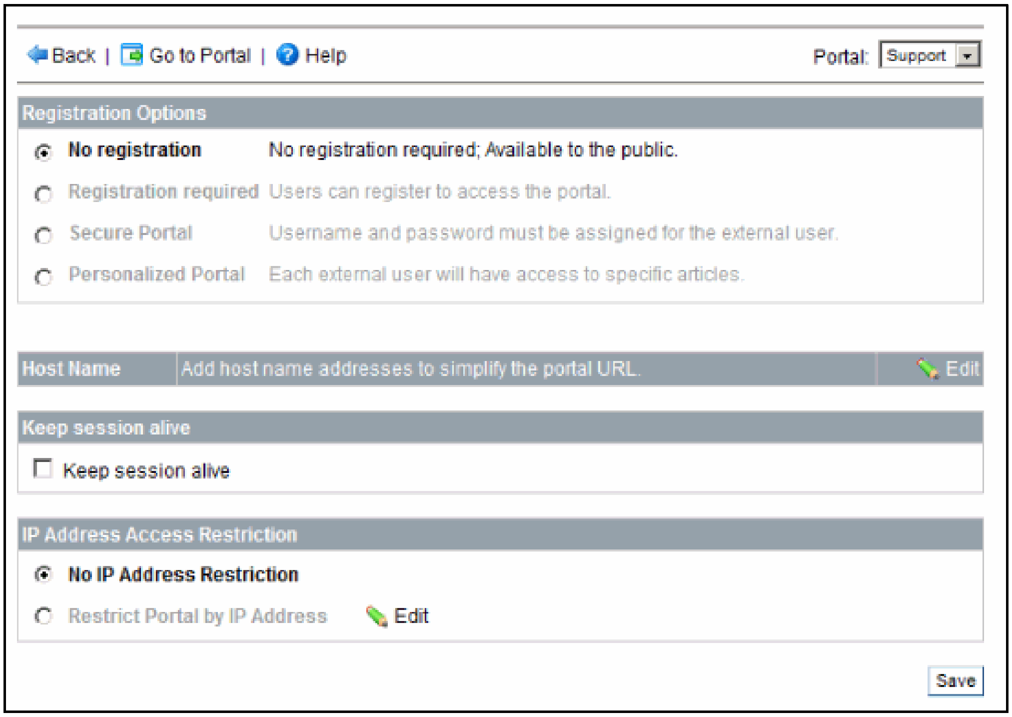


Figure 178 Security and Access Options Main Page

You can select the **Keep session alive** option for the Portal to keep sessions alive indefinitely. By default, the **Keep Session Alive** option is not selected for a Portal, and the Session Timeout warning is displayed to the user when the Portal session times out.

Note

The **Keep Session Alive** option is available only for Portals designed using **Portal Style #4**. Turning this feature **on** may have a negative impact on Portal Style #4 Portals on an Application server as each session that is started never ends until the end user closes the browser and the session is terminated by IIS. The feature should be turned on with careful consideration about performance impact and should be based on business needs.

No Registration

This option enables Portal users to freely access the Knowledge Base portal without requiring a Username, and password. Any restrictions or Users do not require a username, or a password to log on to the Portal. They can log on to the Portal without submitting any registration information. The Portal is essentially open access provided the user has the URL.

To Configure the No Registration Option for a Portal

1. On the **Security and Access Options** page, select the **No registration** option in the **Registration Options** area.
2. Click **Save**.

Registration Required

If the **Registration Required** option is enabled, Users are required to submit information before logging on to the Portal. You can configure the form to be filled up by the User. The information submitted by the User is sent as an email message to the email ID configured. After the User submits the form, the User will be allowed into the Portal. There is no administrative oversight of this process.

Example

You can gather information about the location of the visitors to your Web site. Create a field called **Location** in the form to be submitted by the User.

To Configure the Registration Required Option for a Portal

1. On the **Security and Access Options** page, select the **Registration required** option in the **Registration Options** area.
2. Click **Manage Fields**. The Manage fields page is displayed.

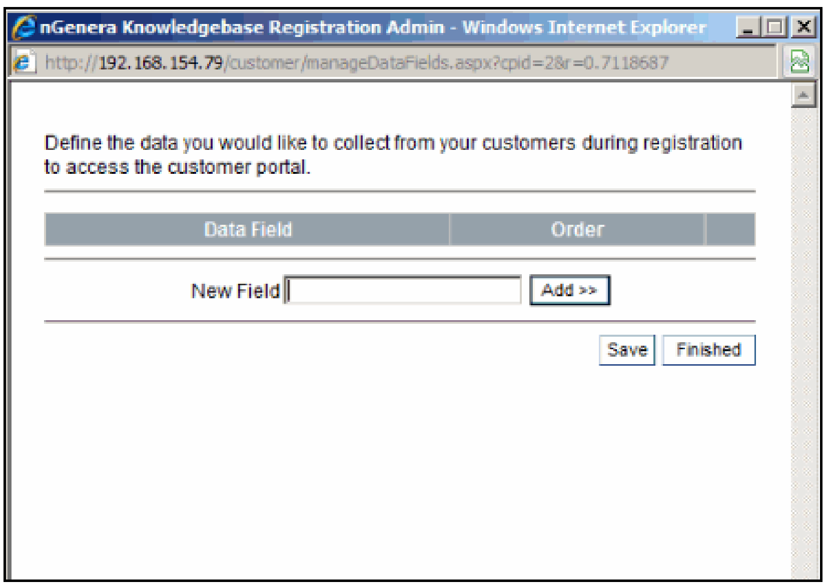


Figure 179 Manage Fields Page

3. Type the name for the New Field, and click **Add**. The field is displayed in the **Data Fields** area.
4. Click **Save**, and add more fields.

   - OR -

   Click **Finished**.

5. Click **Save** on the **Registration Options** page.

> **Note**
>
> - You can modify the order in which the fields are displayed.
> - Additional fields are not stored in the KB database, and cannot be reported.
> - Click ⊗ to delete a field.

> **Caution**
>
> This Portal is not secure. There is no assurance that a user will submit a valid email address. They are only required to fill data into the fields before they submit the form and are granted access to the Portal.

Widget Management

The Widget Management section enables you to configure the display of widgets in various tabs on the Portal. Each widget on the Portal is designed to display specific information that may be useful to the Portal user.

> **Note**
>
> The Widget Management feature is not available for Portals that have been created using **Portal Style 1**, **Portal Style 2**, or **Portal Style3**.

On the Portal Modules page, click **Configure** in the **Widget Management** section. The Widget Management page is displayed.

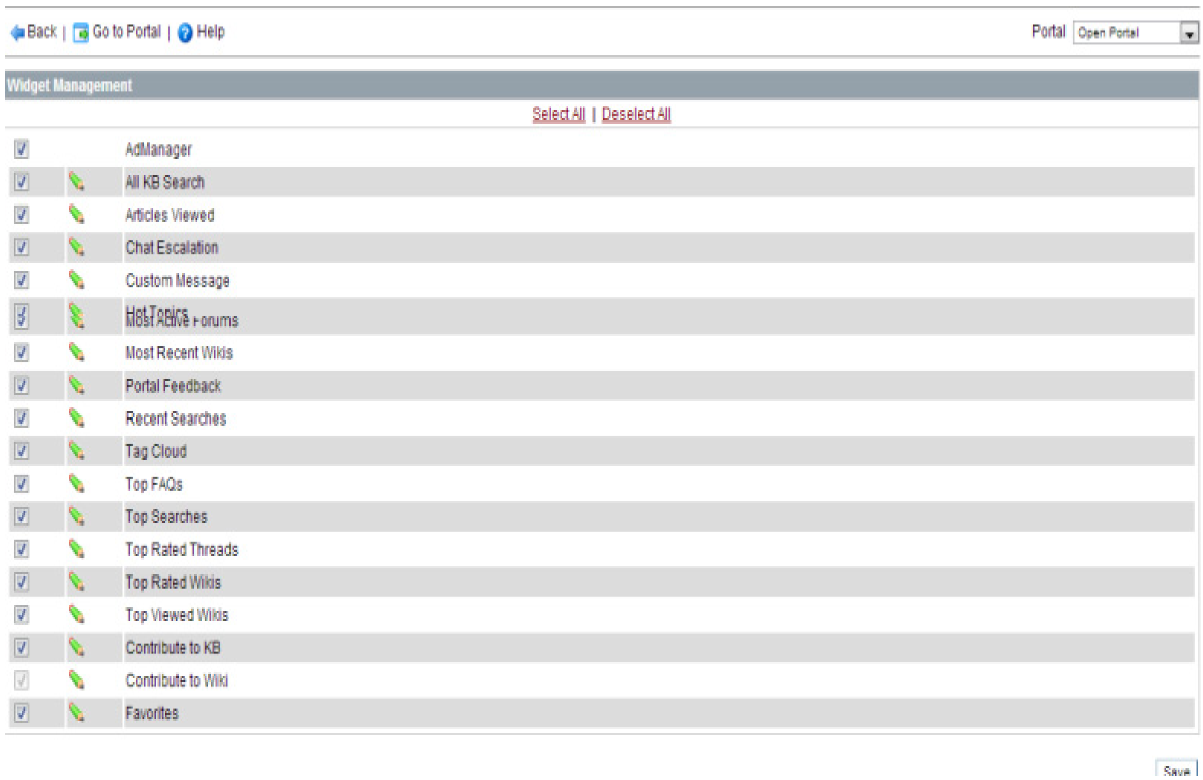


Figure 180 Widget Management Page

The following table describes the options available on the Widget Management page:

Options	Descriptions
AdManager	Select this option to display the **AdManager** widget in the Search Results page on the Portal. The **AdManager** widget displays active Advertisements available on the Portal.
All KB Search	Select this option to display the **All KB Search** widget in the Home tab on the Portal. The **All KB Search** widget enables the customer to search for Articles on the Portal. **Note**: You can edit the **Title**, **Content**, and **Button Text** displayed in the Widget. Select the **All KB Search** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the **Title**, **Content Text**, and **Button Text** as required, and click **Save**.

Options	Descriptions
Articles Viewed	Select this option to display the Articles Viewed widget in the Article Search Results page on the Portal. The **Articles Viewed** widget lists the most recent Articles viewed during a user session. **Note**: You can customize the name of the widget. Select the **Articles Viewed** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the Widget as required. and click **Save**.
Chat Escalation	Select this option to display the **Chat Escalation** widget in the Home tab on the Portal. This Widget can be used for seamless escalation of users from Self Service to Assisted Service. This is a custom Widget in that the content presented is completely under the Administrator's control. **Note**: You can customize the name of the widget, and specify regular text or HTML commands to generate the content to be displayed in the Widget. Select the **Chat Escalation** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the Widget as required, and in the **Enter Custom Script** field, specify the content to be displayed in the widget. Click **Save**.
Custom Message	Select this option to display the **Custom Message** widget in the Home tab on the portal. This widget enables you to configure a custom message that you want to display on the Portal. **Note**: You can edit the **Title**, and the message to be displayed in the widget on the Portal. Select the **Custom Message** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the **Title**, and **Custom Message** as required, and click **Save**.

Options	Descriptions
Hot Topics	Select this option to display the **Hot Topics** widget in the Home page on the portal. The **Hot Topics** widget lists the most viewed Articles on the Portal. The Portal user can click an Article link listed in the widget to view its content. **Note**: You can customize the name of the widget, and configure the number of Articles to be listed in the widget and the date range for the Articles to be listed. To edit the Hot Topics widget, carry out the following steps: 1. Select the **Hot Topics** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Number of days** list, select the date range for the Articles to be listed in the widget. For example, to list Hot Topics of only the last 20 days, merely select 20 from the list. 4. In the **Number of Topics displayed** list, select the number of Articles to be listed in the widget. 5. Click **Save**.

Options	Descriptions
Latest Articles	Select this option to display the **Latest Articles** widget in the Home tab on the Portal. You can configure the **Latest Articles** widget to list only the newly created Articles available on the Portal or to list both the newly created Articles and most recent Articles available on the Portal. The Portal user can click an Article link listed in the widget to view its content. **Note**: You can customize the name of the widget, and configure the number of Articles to be listed in the widget and the date range for the Articles to be listed. To edit the Latest Articles widget, carry out the following steps: 1. Select the **Latest Articles** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Number Items** list, select the number of Articles to be listed in the widget. 4. In the **Date Range** list, select the date range for the Articles to be listed in the widget. For example, to list Latest Articles of only the last 20 days, merely select 20 from the list. 5. In the **Filter By** list, select the **First Published Version** option for the Widget on the Portal to list only the newly created Articles available on the Portal. **- Or -** Select the **Latest Published Version** option for the Widget on the Portal to list both the newly created Articles and the most recent Articles available on the Portal. 6. Click **Save**.
Most Active Forums	Select this option to display the **Most Active Forums** widget in the Forums tab on the Portal. The **Most Active Forums** widget lists the most active Forum Threads, and displays the number of Posts for each listed Thread. **Note**: You can customize the name of the widget. Select the **Most Active Forums** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required, and click **Save**.

Options	Descriptions
Most Recent Wikis	Select this option to display the **Most Recent Wikis** widget in the Wiki tab on the Portal. The **Most Recent Wikis** widget lists the most recent Wiki Articles created on the Portal. **Note**: You can customize the name of the widget. Select the **Most Recent Wikis** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.
Portal Feedback	Select this option to display the **Portal Feedback** widget in the Home tab on the Portal. The **Portal Feedback** link in the **Portal Feedback** widget enables the Portal users to provide feedback about their experience on the Portal. When the Portal User clicks the **Portal Feedback** link, the Knowledge Base Site Feedback page is displayed. The Portal User can provide feedback and also, give suggestions on how to improve the Portal. **Note**: You can edit the **Title**, **Content**, and **Button Text** displayed in the Widget. Select the **Portal Feedback** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the **Title**, **Content Text**, and **Button Text** as required, and click **Save**.
Recent Searches	Select this option to display the **Recent Searches** widget in the Article Search Results page on the Portal. The **Recent Searches** widget displays the most recent search strings used in a user session. **Note**: You can customize the name of the widget. Select the **Recent Searches** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the Widget as required and click **Save**.

Options	Descriptions
Tag Cloud	Select this option to display the **Tag Cloud** widget in the Wikis tab on the Portal. The **Tag Cloud** widget lists the top tags applied to Wikis on the Portal. **Note**: You can customize the name of the widget, and configure the number of tags to be listed in the widget and the date range for the tags to be listed. To edit the Tag Cloud widget, carry out the following steps: 1. Select the **Tag Cloud** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Number Items** list, select the number of tags to be listed in the widget. 4. In the **Date Range** list, select the date range for the tags to be listed in the widget. For example, to list Tags from only the last 20 days, merely select 20 from the list. 5. Click **Save**.
Top FAQs	Select this option to display the **Top FAQs** widget in the Home tab on the Portal. The **Top FAQs** widget lists the top Frequently Asked Questions (FAQs) on the Portal as measured by times viewed. **Note**: You can customize the name of the widget, and configure the number of FAQs to be listed in the widget and the date range for the FAQs to be listed. To edit the Top FAQs widget, carry out the following steps: 1. Select the **Top FAQs** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Number Items** list, select the number of FAQs to be listed in the widget. 4. In the **Date Range** list, select the date range for the FAQs to be listed in the widget. For example, to list Top FAQs of only the last 20 days, merely select 20 from the list. 5. Click **Save**.

Options	Descriptions
Top Searches	Select this option to display the **Top Searches** widget in the Home tab on the Portal. The Top Searches widget lists the top searches for the Portal as measured by the number of times a string is submitted. **Note**: You can customize the name of the widget, and configure the number of top search strings to be listed in the widget and the date range for the top search strings to be listed. To edit the Top Searches widget, carry out the following steps: 1. Select the **Top Searches** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Number Items** list, select the number of top search strings to be listed in the widget. 4. In the **Date Range** list, select the date range for the top search strings to be listed in the widget. For example, to list Top Searches of only the last 20 days, merely select 20 from the list. 5. Click **Save**.
Top Rated Threads	Select this option to display the **Top Rated Threads** widget in the Forum tab on the Portal. The **Top Rated Threads** widget on the Portal lists the top rated Forum Threads as measured by average Post ratings. **Note**: You can customize the name of the widget. Select the **Top Rated Threads** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.
Top Rated Wikis	Select this option to display the **Top Rated Wikis** widget in the Wiki tab on the Portal. The **Top Rated Wikis** widget on the Portal lists the top rated Wiki Articles as measured by average Wiki ratings. **Note**: You can customize the name of the widget. Select the **Top Rated Wikis** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.
Top Viewed Wikis	Select this option to display the **Top Viewed Wikis** widget in the Wiki tab on the portal. The **Top Viewed Wikis** widget lists the most viewed Wiki Articles on the Portal. **Note**: You can customize the name of the widget. Select the **Top Viewed Wikis** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.

Options	Descriptions
Contribute to KB	Select this option to display the **Contribute to KB** widget in the Home page on the Portal. The **Contribute to KB** widget enables a Portal User to contribute to the Knowledgebase, Wikis and Forums on the Portal. To edit the Contribute to KB widget, carry out the following steps: 1. Select the **Contribute to KB** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Content Text** field, specify the text you want to display in the widget. 4. In the **Button Text** field, specify the label you want to assign to the button displayed in the widget. When the Portal User clicks the Button in the widget, a New page with **Knowledgebase**, **Forum** and **Wiki** sections is displayed. You can customize the look and feel of these sections as required. 5. Click **Save**.
Contribute to Wiki	Select this option to display the **Contribute to Wiki** widget in the Wiki page on the Portal. This Widget offers users the ability to Write a Wiki. Users will be required to Login prior to authoring. To edit the Contribute to Wiki widget, carry out the following steps: 1. Click the icon that is displayed to the left of the Contribute to Wiki option. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Content Text** field, specify the text you want to display in the widget. 4. In the **Button Text** field, specify the label you want to assign to the button displayed in the widget. 5. Click **Save**.

Options	Descriptions
Favorites	Select this option to display the **Favorites** widget in the Wiki page on the Portal. The Favorites widget offers users the ability to track the number of times the articles have been viewed and lists them for easy access at any time. To view the Favorites widget, carry out the following steps: 1. Click the  icon that is displayed to the left of the Favorites option. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. Select a number from the **Number of Items** drop-down list. 4. Select a number from the **date-range** drop-down list. 5. Click **Save.** The specified number is saved.
Select All	Click to select all the widget options on the page.
Deselect All	Click to deselect the widget options selected on the page.
Save	Click to save the changes made on the Widget Management page.

Note

You can hide the title of a Widget just by removing the Title on the Edit Widget page.

To configure the display of widgets for a Portal, carry out the following steps:

1. On the Portal Modules page of a Portal, click **Configure** in the **Widget Management** section. The Widget Management page is displayed.
2. Select the appropriate check box(es) based on the widget(s) you want to display on the Portal.
3. Click the **Select All** option to select all the widgets on the Widget Management page.

Note

You can click the **Deselect All** option to deselect the widgets selected on the page.

4. Click **Save**.The Settings Saved message is displayed.
5. Click **OK**. The selected widgets are configured to be displayed on the Portal.Secure Portal

A secure Portal requires the User to log on to the Portal using the login credentials you have provided. You must create External Users in the **External Users** section of the Portal tab, and communicate the login credentials to the appropriate persons.

Example

You create a Portal for your company's technical support department. You only want support representatives to have access to the Portal. In the **External Users** area you create user names and passwords for each support representative, and communicate the same to each user. Only your technical support team can access this KB Portal.

The **External Users** option on the Portal tab enables you to create and modify Portal users for the secure Portal. For more information about Portal users, see **“External Users” on page 358**.

To Configure the Secure Portal Option for a Portal

1. On the **Security and Access Options** page, select the **Secure Portal** option in the **Registration Options** area.
2. Click **Manage Fields**. The **Secure Portal Data Fields** page is displayed.

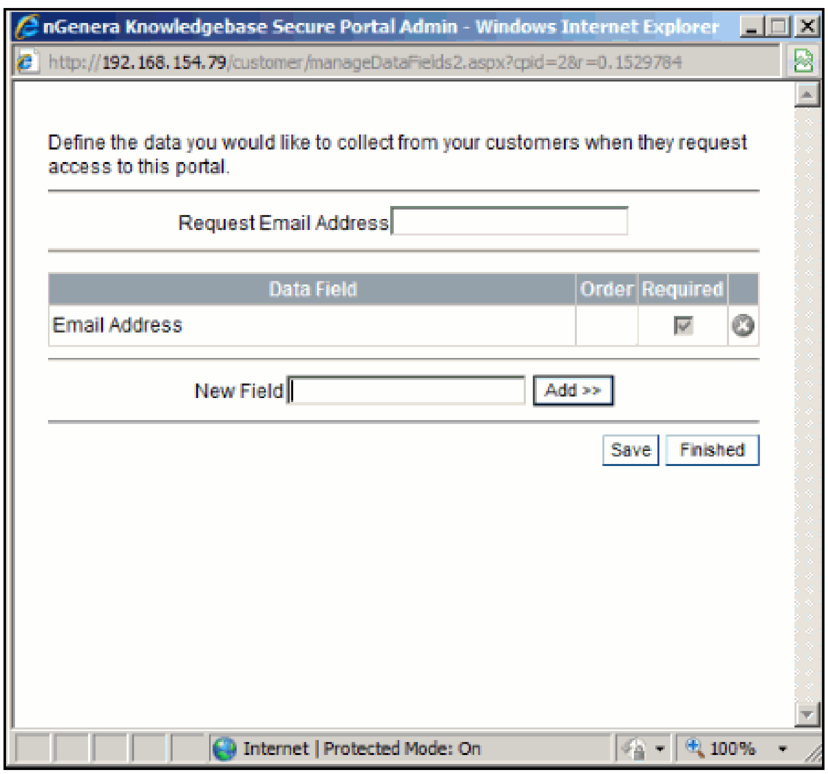


Figure 181 Secure Portal Date Fields Page

3. The **Email Address** field is mandatory. The username and password will be sent to the User at this email address.
4. Type the name for the **New Field**, and click **Add**. The field is displayed in the **Data Field** area.

5. Click **Save**, and add more fields.

   – OR –

   Click **Finished**.
6. Click **Save** on the Registration Options page.

> **Notes:**
>
> - You can modify the order in which the fields are displayed.
> - The fields that are stored in the KB database are First Name, Last Name, Username, Email Address, and Password.
> - Click ⊗ to delete a field.
> - You cannot delete the **E-mail Address** field.

Personalized Portal

A Personalized Portal enables you to control access to the Portal, and also customize the content viewed by each User. The User must log on to the Portal using the login credentials you have provided. The User will have access only to those Knowledge Bases and Article Groups to which you have given them access. The External Users area of KB Portal section in Knowledge Spaces™ Admin Control Panel enables you to create and modify Portal users. For more information, see **“External Users” on page 358**.

To Configure a Portal as a Personalized Portal

1. In the **Registration Options** area on the **Security and Access Options** page of a Portal, select the **Personalized Portal** option. The **Entitlement** section and **Manage fields** option are displayed on the page.

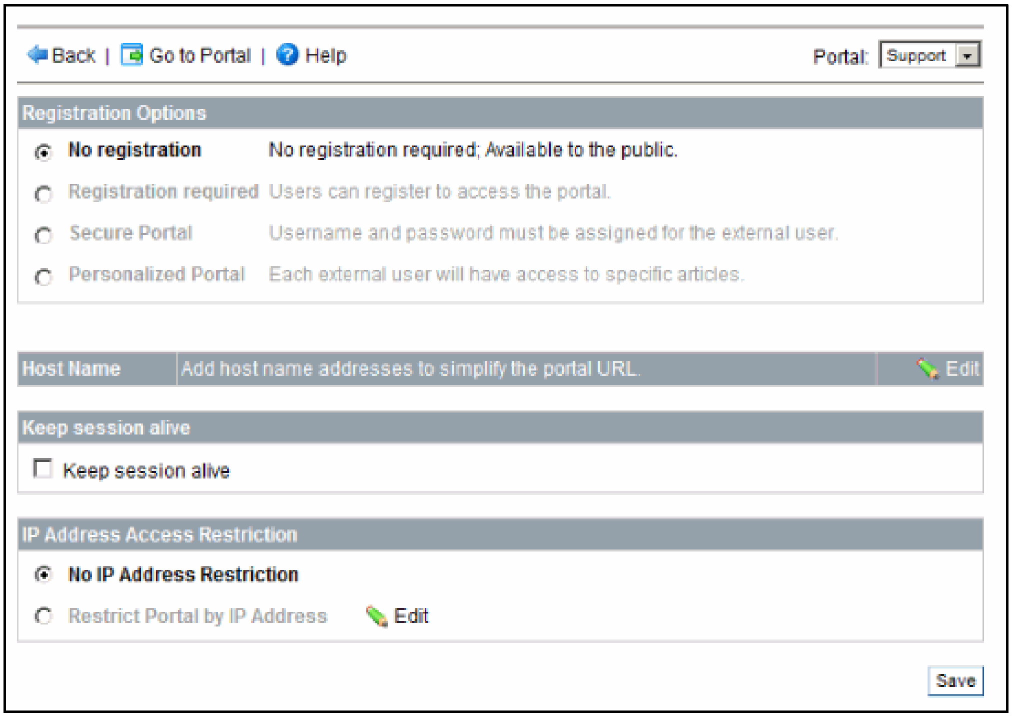


Figure 182 Security and Access Options Page.

2. Click **Manage Fields**. The **Personalized Portal Data Fields** page is displayed.

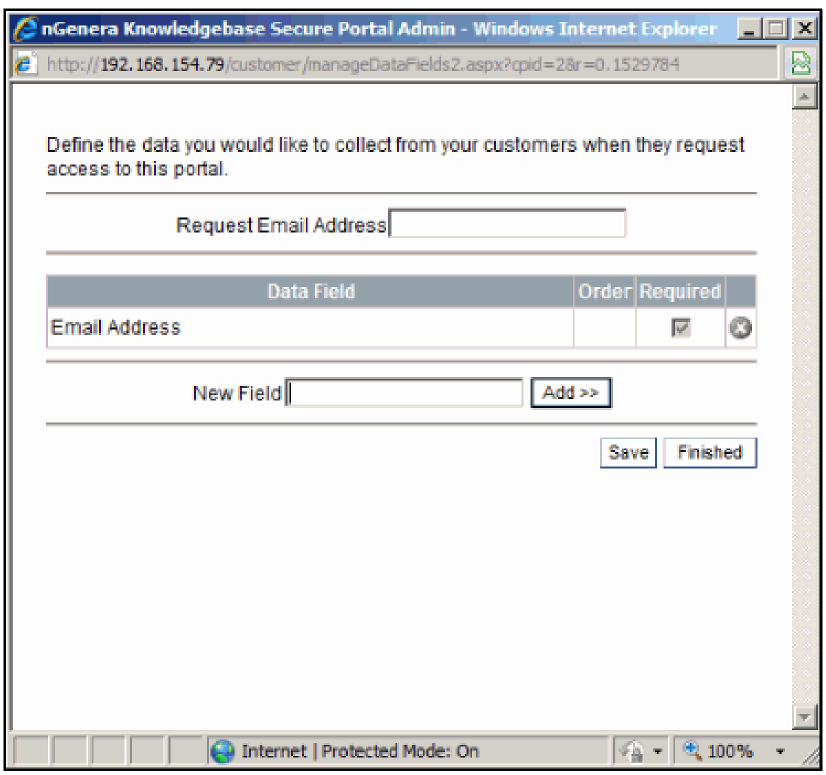


Figure 183 Personalized Portal Date Fields Page

3. The **Email Address** field is mandatory. The username and password will be sent to the User at this E-mail address.
4. Type the name for the New Field, and click **Add**. The field is displayed in the **Data Field** area.
5. Click **Save**, and add more fields.

   – OR –

   Click **Finished**.
6. Click **Save** on the **Registration Options** page.

> **Note:**
>
> - You can modify the order in which the fields are displayed.
> - The only fields that are stored in the KB database are First Name, Last Name, Username, Email Address, and Password.
> - Click to delete a field.
> - You cannot delete the **E-mail Address** field.

> **Caution**
>
> In a Personalized Portal, the Articles that are available in the Portal are those that belong to an Article Group. In other words, you must ensure that the combination of Knowledge Bases, Article Group Access, and External Users is correct or the Portal may potentially "appear" to be empty to a user.

Creating a Host Name

By creating a host name for a Portal, you can create domain names for the Portal, so you do not have to use the entire Portal URL.

Example

You can add **knowledgebase.yourcompany.com** as a host name to point to a Portal, and that would be the Portal URL. You must also create the appropriate DNS records on your DNS server.

To Create and Manage a Host Name for a Portal

1. On the Computer where Spaces by Moxie™ - Knowledge Spaces™ Customer Portal is installed, click **Start** > **Programs** > **Administrative Tools** > **Internet Services (IIS) Manager**.The **Internet Information Services (IIS) Manager** page is displayed.
2. Browse to the **Customer Portal** Website.
3. Right click the **Customer Portal** website name, and select **Properties**.
4. The **Properties** dialog box is displayed. The Web Site tab displays the website information.

5. Click **Advanced**. The Advanced Web Site Identification dialog box is displayed.
6. Click **Add**.The **Add/Edit Web Site Identification** dialog box is displayed.
7. The IP address of the computer where the Customer Portal is installed is selected in the **IP address** field.
8. In the **TCP port** field, specify the port number used to connect to the Customer Portal.
9. In the Host Header value, specify a friendly URL for the Portal. For example: **"knowledgebase.yourcompany.com".**
10. Click **OK**.
11. Click **OK** on the Advanced Web Site Identification page.
12. On the Portal page in Knowledge Spaces™ Admin Control Panel, click the name of the Portal for which you want to set the Host name.
13. Click **Configure** in the Security & Access Options section. The Portal Security Options page is displayed.
14. Click 

in the **Host Name** area. The **Host Headers** page is displayed.

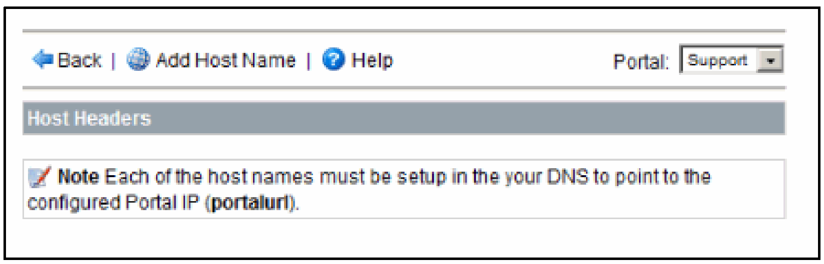


Figure 184 Host Headers Page

15. Click 

. The **Add Host Name** window is displayed.

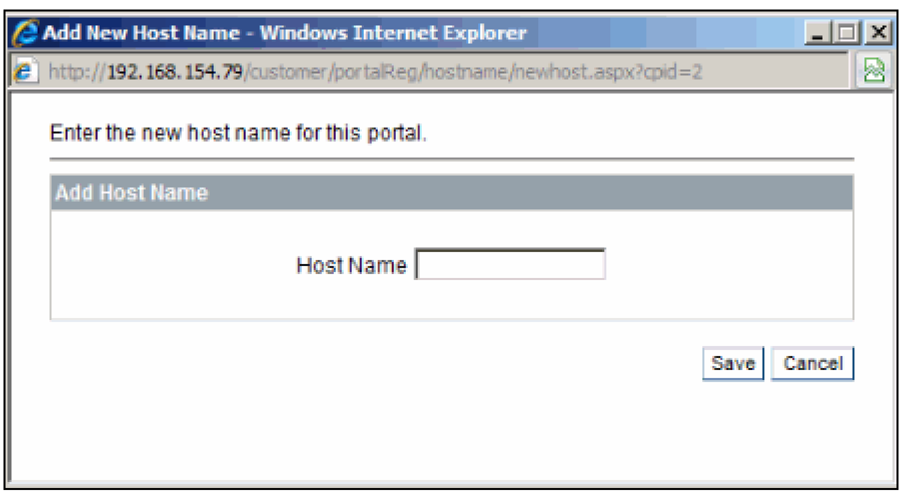


Figure 185 Add HostName Dialog Box

16. Enter the Host name for the Portal.
17. Click **Save**.
18. Reset **IIS**.

IP Address Access Restriction

You can determine the IP addresses that can access a particular Portal.

To Select the IP Address that can access a Portal

1. Select the **Restrict Portal by IP Address** option in the **Registration Options** area.
2. Click 

. The following page is displayed.

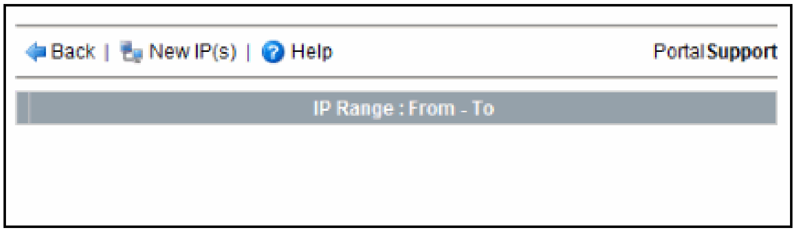


Figure 186 Page to Add the IP Address That Can Access a Portal

3. Click 

. The New Restriction IP(s) page is displayed.
4. Type the IP address in the **IP Address From** field.

> **Note:**
>
> The 1st and 2nd octets in the **IP Address To** field are automatically updated with values based on the **IP Address From** range specified.

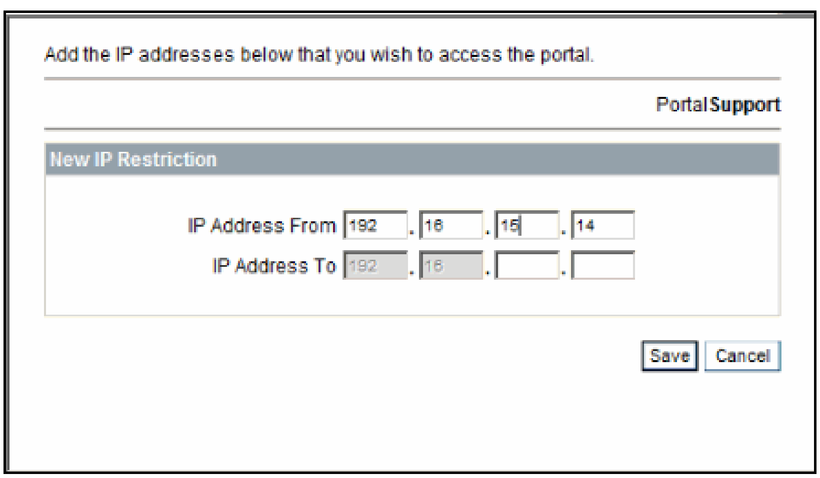


Figure 187 New Restriction IP(s) Page

5. Specify the required values in the 3rd and 4th octet levels of the **IP Address To** field based on the IP Address restriction required.
6. Click **Save**.

   Click **Cancel** to cancel the operation.

Managing Portal Snap-Ins

Portal Snap-Ins are functional elements from your Portal that can be embedded either in your Portal, or within other Portals. Snap-In behavior is controlled by the way your Portal is configured. Each Portal Snap-In has a unique URL making it very easy to extend the use of KB.

Using these customized Web pages, the Portal Snap-Ins provide an easy way to integrate the Portal functionality into a web page or intranet, as well as include Portal functionality without using a full Portal frameset.

The Snap-Ins provide an extremely flexible and functional solution.Whether you need to create a self-service customer support web site, or you need to capture exact intranet design while integrating the Knowledge Base Portal technology.

The Portal Snap-In area is accessible from the Portal tab in KB Administrator. After you select your Portal, click **Configure** in the Portal Snap-Ins area.

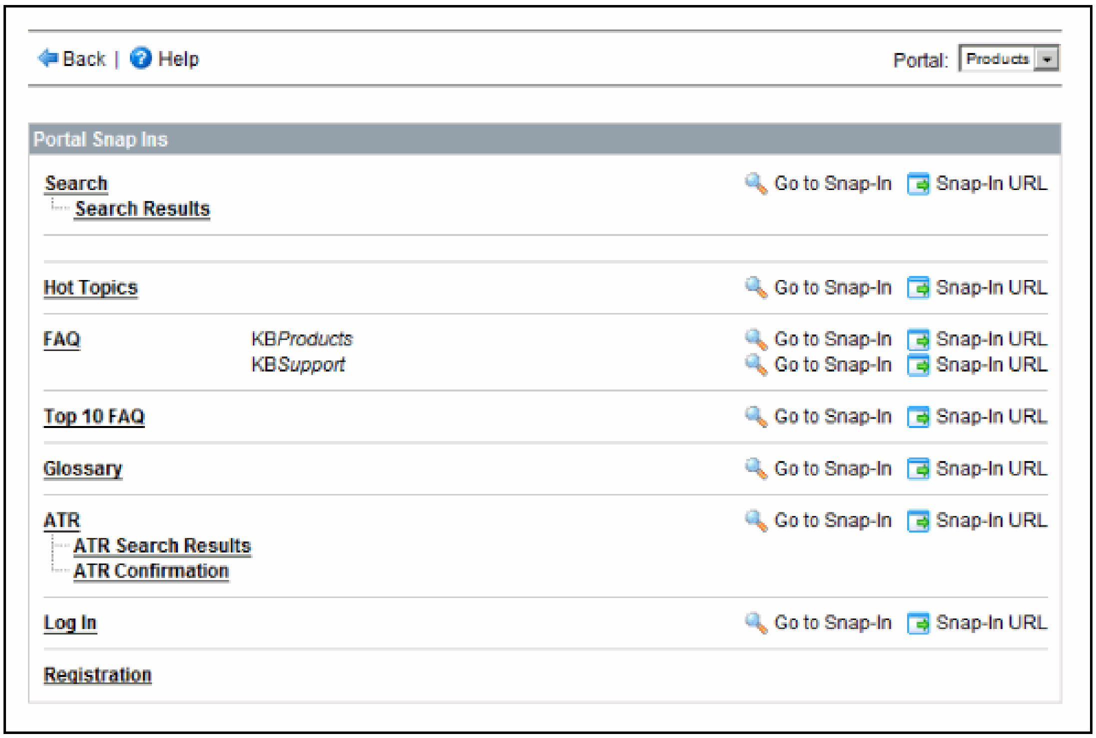
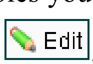


Figure 188 Portal Snap-In Customization Main Page

Customization

The Customization area enables you to upload various images to replace some of the standard icons used in the Portal Snap-Ins, Click 

, and add the new resource from your computer.

Note:

The **Customization** area is available only for Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.

After you access the customization area, you can view a list of the available resources:

- default.css
- article.gif
- bookclosed.gif
- bookopen.gif
- folderclosed.gif
- folderopen.gif

The **default** style sheet governs the basic style of all the Portal Snap-Ins. Click View to view the HTML content of the default style sheet.

If you want to upload a new style sheet that governs the design of all your Snap-Ins, click Select a new style sheet, and upload it into the system.

> **Note**
>
> - Any file that you upload to replace the **default.css** file must have a **.css** file extension.
> - If you want to delete the one you uploaded and return to the default style sheet, click the **Delete** icon to delete the latest version. All the other resources other than the **default.css** pertain only to the category browsing Snap-In. The default icons represent the Knowledge Bases and the Knowledge Base categories that your Portal users see as they use the category-browsing functionality. If you want to change and upload replacement icons, click , and upload the new files from your local system.
> - You cannot delete the default style sheet and icons, you can only delete ones that you have uploaded, and then return to the default settings.

Portal Snap-Ins

The following Snap-Ins are available for use and customization:

- Search Page and the Search Results Page
- Category Browsing
- Hot Topics
- FAQ Section
- Top Ten FAQ Section
- Glossary
- Automatic Ticket Resolution and ATR Results and Confirmation Pages
- Article Display
- Login

- Registration

> **Note:**
>
> The **Category Browse** and **Article Display** SnapIns are available only for Portals that have been created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.

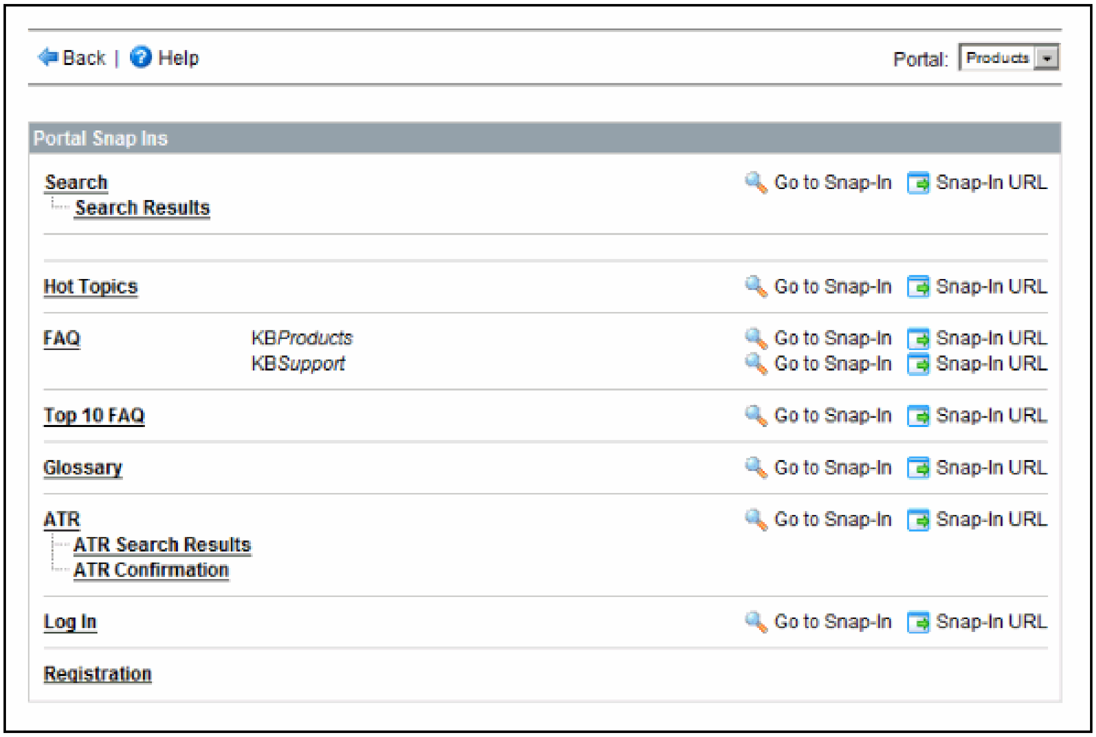


Figure 189 Customizing the Portal Snap-Ins Page

Customizing the Snap-Ins

To customize the look, feel, and design of the Snap-Ins, click the name of the Snap-In you want to customize. The page to add the Snap-In code is displayed.

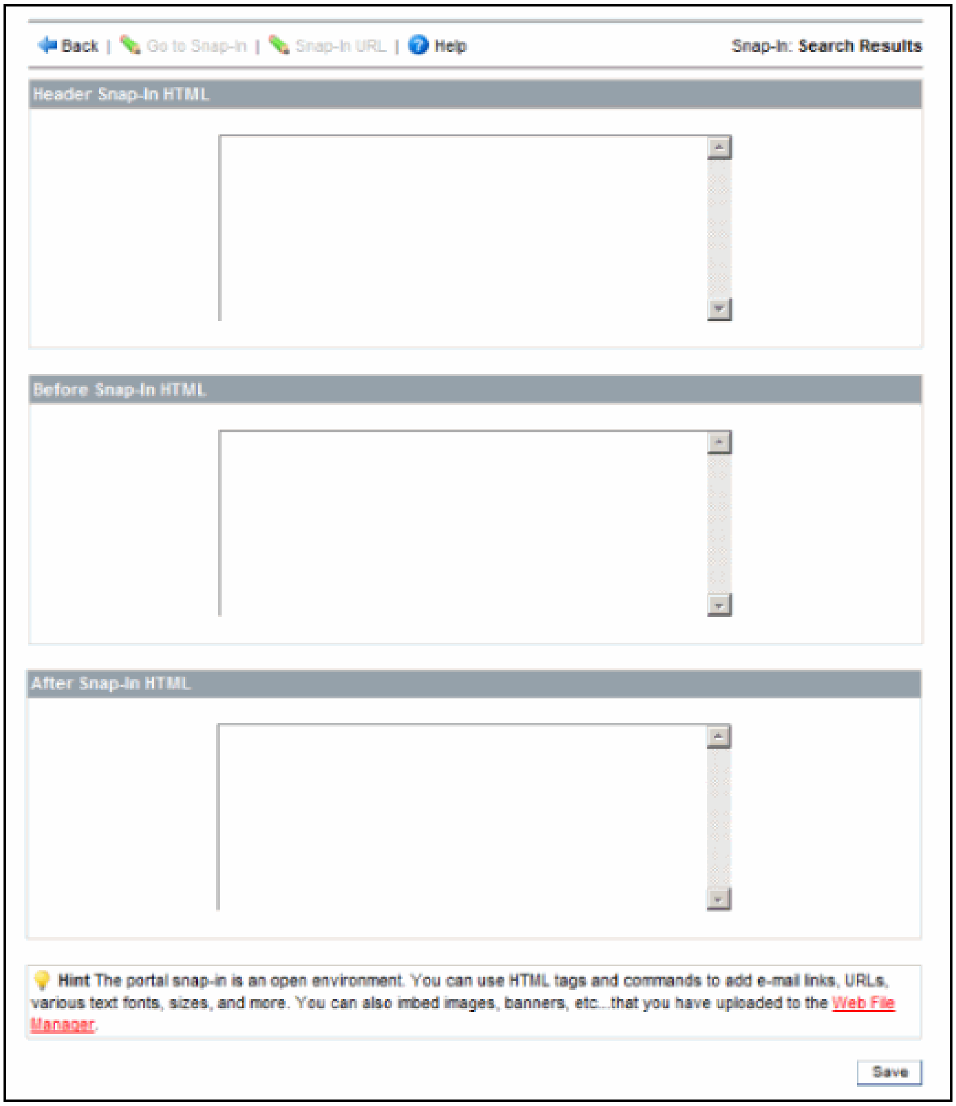


Figure 190 Sample SnapIn Page

Specify the HTML code in the **Header Snap-In HTML**, **Before Snap-In HTML**, and **After Snap-In HTML** fields. In these fields, you can enter the content that you want to use in the header, before and after the Snap-In on the HTML pages that are generated, containing the Portal Snap-In.

Note:

You see a separate FAQ Snap-In for each Knowledge Base you created. However, the Top Ten FAQ Snap-In displays the overall top ten FAQ of all the Knowledge Bases, and not the top ten FAQ for individual Knowledge Bases.

Header Snap-In HTML

The content for the Snap-In header is inserted in the document header section. The content must be any html content permitted in headers, such as Meta tags, stylesheet links, title tag, or script references.

> **Note:**
>
> There is no error checking. Ensure that the code you enter here gives the desired effect, especially if you have added scripts or stylesheet links.

The code below shows where the Header content will be inserted:

```
<!doctype html public "-//w3c//dtd xhtml 1.0 transitional//en" "http://
www.w3.org/tr/xhtml1/dtd/xhtml1-transitional.dtd">
  <html xmlns="http://www.w3.org/1999/xhtml">
  <head id="ctl00_htmlHead">
  <script src="/Content/js/ext/all.js" type="text/javascript"></script>
  <script type="text/javascript" src="/content/js/master.js"></script>
  <link  rel="stylesheet"  type="text/css"  href="/content/css/navy/
  styles.css"/>
  Your Header content is inserted here
  </head>
  <body>
  </body>
```

Before Snap-In HTML

The Before Snap-In HTML content is displayed at the top of the Snap-In. This text area can use any html tags except the <html>, <body>, or <head> tags

> **Note**
>
> - If you use the <html>, <body>, or <head> tag for Before Snap-In HTML, the tag will not be stripped and it will break the functionality of the site.
> - There is no error checking on this content. Ensure that you preview the Snap-In to check that the content entered hasn't broken the page. Ensure that you use current html markup practices and properly nest and close all the html tags.

After Snap-In HTML

The After Snap-In HTML content is displayed at the bottom of the Snap-In. Ensure that you properly format and preview the content in the Snap-In to make sure it works correctly.

To the right of each Snap-In are two links, **Go to Snap-In**, and **Snap-In URL**.

After specifying the SnapIn content, click **Go to Snap-In** to view the Snap-in, in a new browser window. Click the **Snap-In URL** link, to get the URL of the Snap-in. The URL for that particular Snap-In is displayed in a new browser window. The Snap-In URL is needed to link to or embed the Snap-In in a web page.

> **Note**
>
> You are not able to go to the Snap-Ins or view the Snap-In URLs for the **Search Results**, **ATR Search Results**, and **ATR Confirmation** Snap-Ins. These Snap-Ins are generated from a dynamic process, depending on data entered by the Portal users, and have no set URLs. However, you can still customize the design for the Snap-In.

Article Display Snap-Ins

You can embed Article Information features within the Article display Snap-In by using the following tags and javascript functions. For all tags except ID, Title, and Date, use the following code to create your own custom link to the information item.

Example

For the Print display — <img src="/display/4/images/print_Article.gif" border="0" alt="Print">

Article ID	[[id]]
Title	[[title]]
Modified Date	[[modifydate]]
Print	Article_print()
Email	Article_email()
Bookmark	Article_bookmark()
Download	Article_download()
Attachments	Article_attachments()
Feedback	Article feedback()
Subscription	Article_subscribe()
Related Articles	Article_relatedarticles()
Related Links	Article_links()

Note:

- An easy way to add images or other files to the Portal Snap-In page is to use the Web File Manager. You can upload any file into the Web File Manager, and use the file location (URL in web file manager) and HTML commands to reference the file in the Snap-In Customization area.
- When you have finished your customization, click **Save**. Click the **Go to Snap-In** link on the next page to view the Snap-In that you were customizing.
- The **Article Display Snap-In** is available only for Portals that have been designed using Portal Style #1, Portal Style #2, or Portal Style #3.

Portal Modules

Knowledge Spaces™ is designed to provide Portal users with a number of search options. The Portal Modules page lists the Portal tabs, and search options that can be configure for a Portal. You can create a KB Portal, and configure the tabs and search options to display on a Portal.

You can configure the **Category Browsing**, **FAQ**, **Solution Finder**, **Glossary**, **Automatic Ticket Resolution (ATR)**, **Forum**, **Wiki**, and **RSS** features to display on a Portal.

In addition, the Portal Modules page enables you to configure up to seven Optional Tabs for a Portal. You can use these tabs to configure any integrated functionality that you want to display on a Portal. For example, you can use an Optional Tab to display the Moxie Software Chat Customer Client when you integrate the Portal with Moxie Software's ***Chat***.

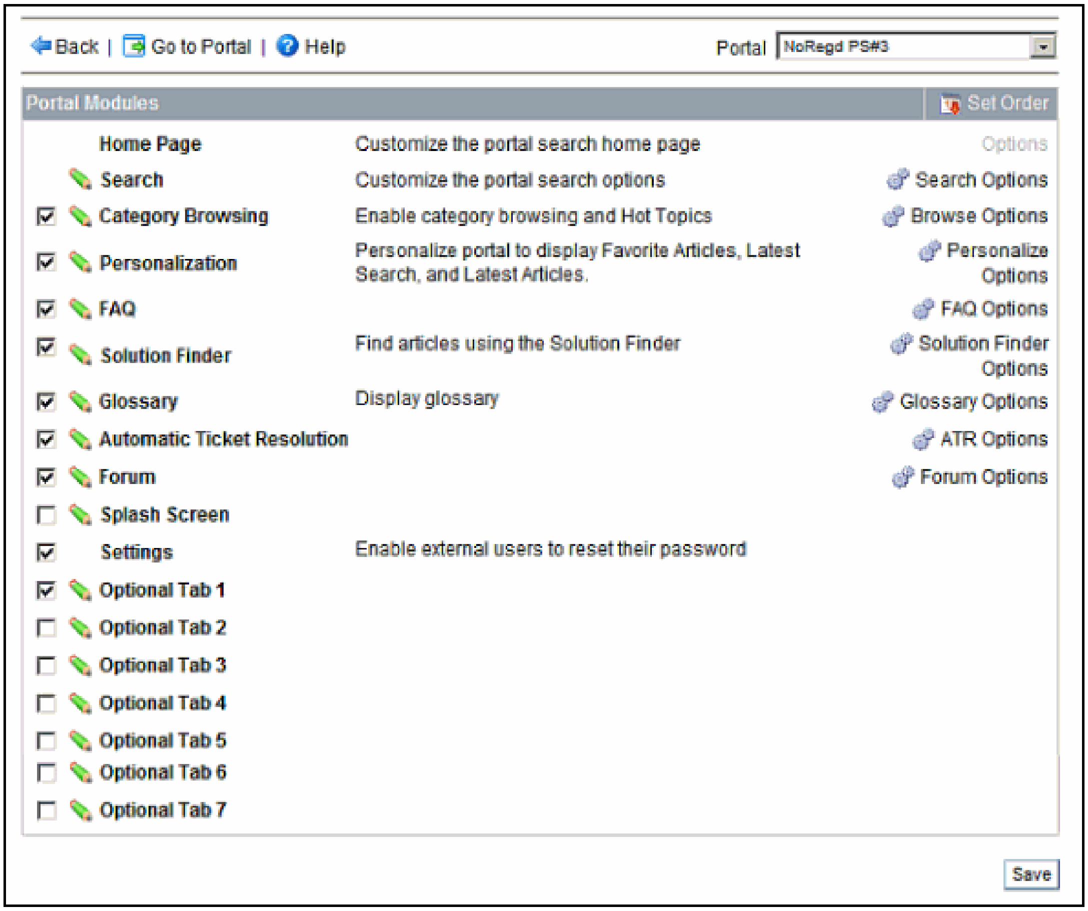


Figure 191 Portal Modules Page for Portals Using Portal Style #1, #2, Or #3.

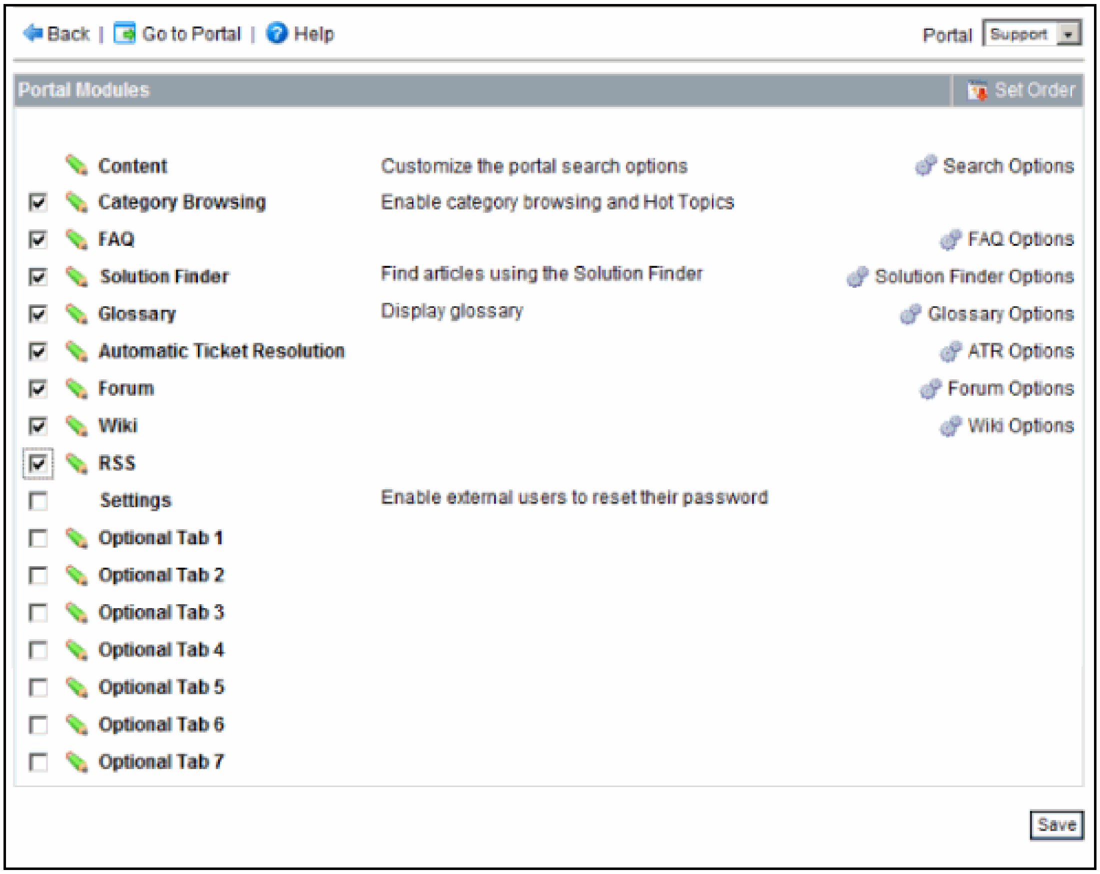


Figure 192 Portal Modules Page - Portals Using Portal Style #4

Select the appropriate Portal Module(s) you want to include for a Portal

You can also set the order of Portal Modules to display on a Portal by clicking the **Set Order** option.

The following table describes the Portal Modules available for Portal Style #1, 2, 3 and 4.

Portal Modules	Available for Portal Style #1, 2 and 3	Available for Portal Style #4
Home Page	Yes	No
Search	Yes	No
Content	No	Yes
Category Browsing	Yes Available with Browse option	Yes. Available without Browse option
Personalization	Yes	Yes
FAQ	Yes	Yes
Solution Finder	Yes	Yes
Glossary	Yes	Yes

Portal Modules	Available for Portal Style #1, 2 and 3	Available for Portal Style #4
Automatic Ticket Resolution	Yes	Yes
Forum	Yes	Yes
Splash Screen	Yes	No
Wiki	No	Yes
RSS	No	Yes
Settings	Yes	Yes
Optioon Tabs (1-7)	Yes	Yes

Configuring Portal Modules

You can customize the display of the Portal by configuring the Portal Modules. This section describes the Portal Modules and their configuration.

Home Page

The Home page is the first page that displays when a Portal User accesses a Portal. You can customize the options available on a Portal Home page using the Home Page option.

This option is not available for Portal Style #3.

The Home page is not applicable if you are using Portal Snap-Ins.

To configure the Home Page for a Portal, carry out the following steps:

1. Click **Options. The Home Page with the Customization options is displayed.**

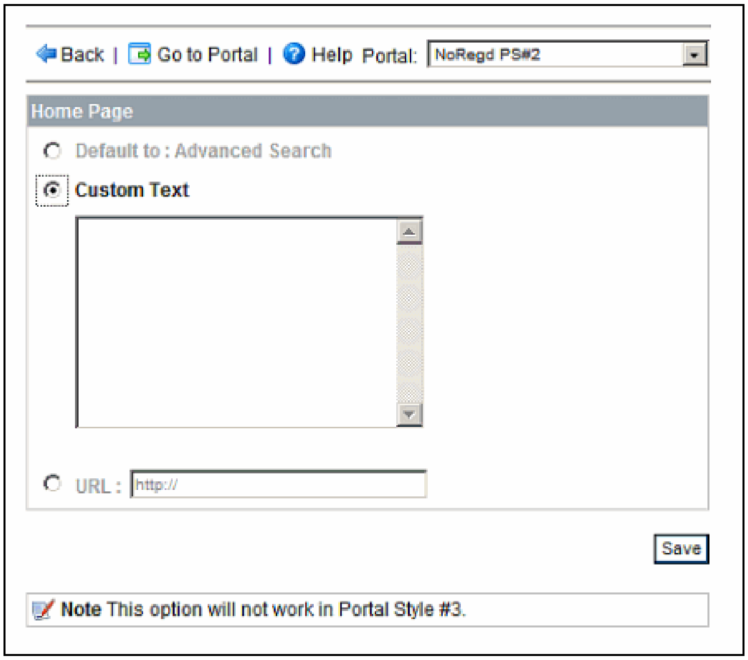


Figure 193 Portal Customization Options

The following options are available:

Conceptual Searching Pattern

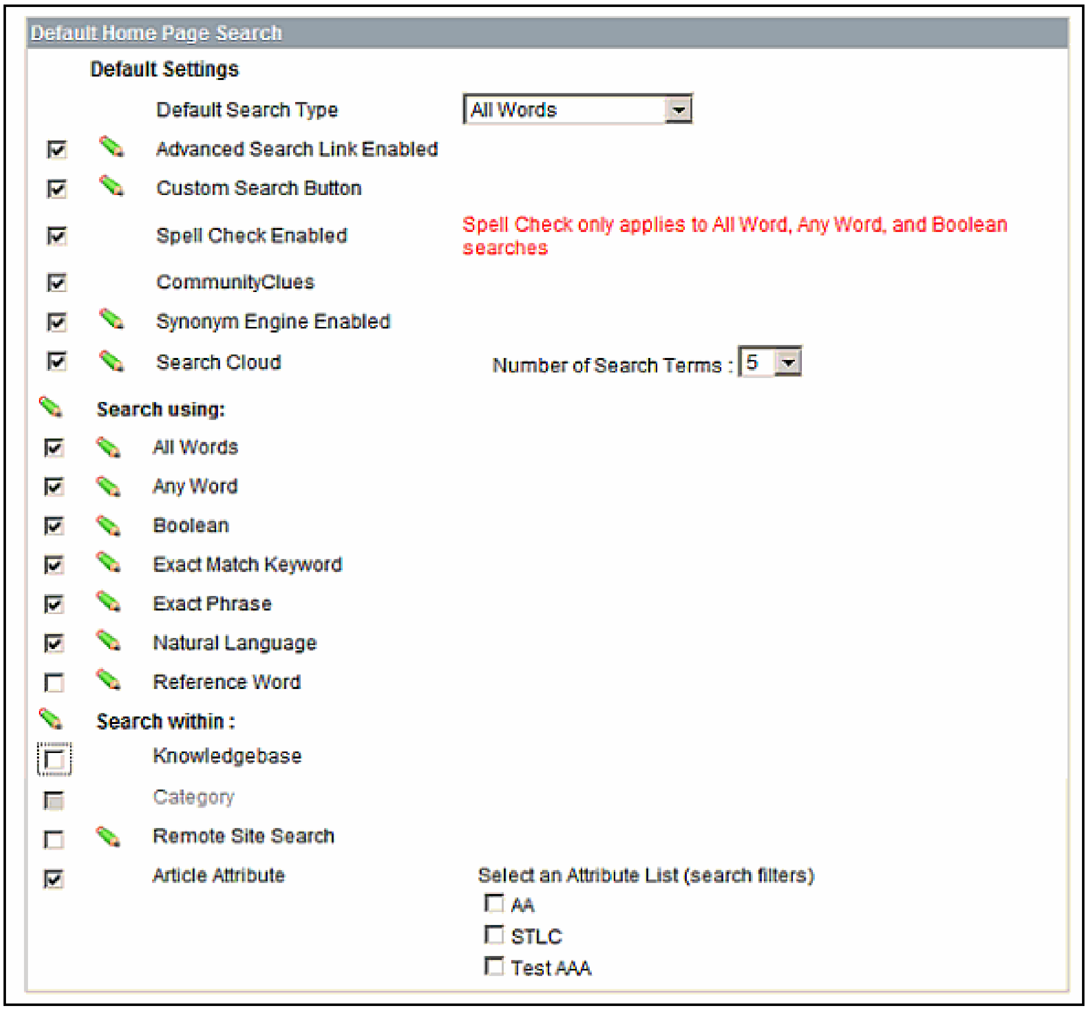
Option	Description
Advanced Search	The Advanced Search option enables a Portal User to scrutinize the search by a series of search filters. In the **Portal Customization Options** page, select **Default to: Advanced Searc**h option, and then click **Save.**
Custom Text	The Custom Text option enables you to enter HTML content or text to be displayed on a Portal Home page. In the **Portal Customization Options** page, select **Custom Text**, enter the text or HTML content in the text box, and then click **Save.**
URL	The URL option enables you to enter a URL to be displayed on a Portal Home page. When a Portal User clicks on the URL, the content of URL is displayed. In the **Portal Customization Options** page, select URL option, enter the URL and then click **Save**.

The Knowledge Spaces™ Search system uses Conceptual pattern matching search which enables a Portal user to search for content that is related by meaning, and ranked by relevance to the search criteria.

When a Portal user searches for Articles, the Conceptual searching in Knowledge Spaces™ takes into account the context in which the search terms appear and matches the concepts rather than simply finding the actual text strings. The conceptual searching in Knowledge Spaces™ reduces the number of false hits, and increases the number of relevant results by returning Articles that contain the concept.

Content

The content option enables you to configure Search options for a Portal. In the Portal Modules page, click Search Options, the Search Settings page is displayed.



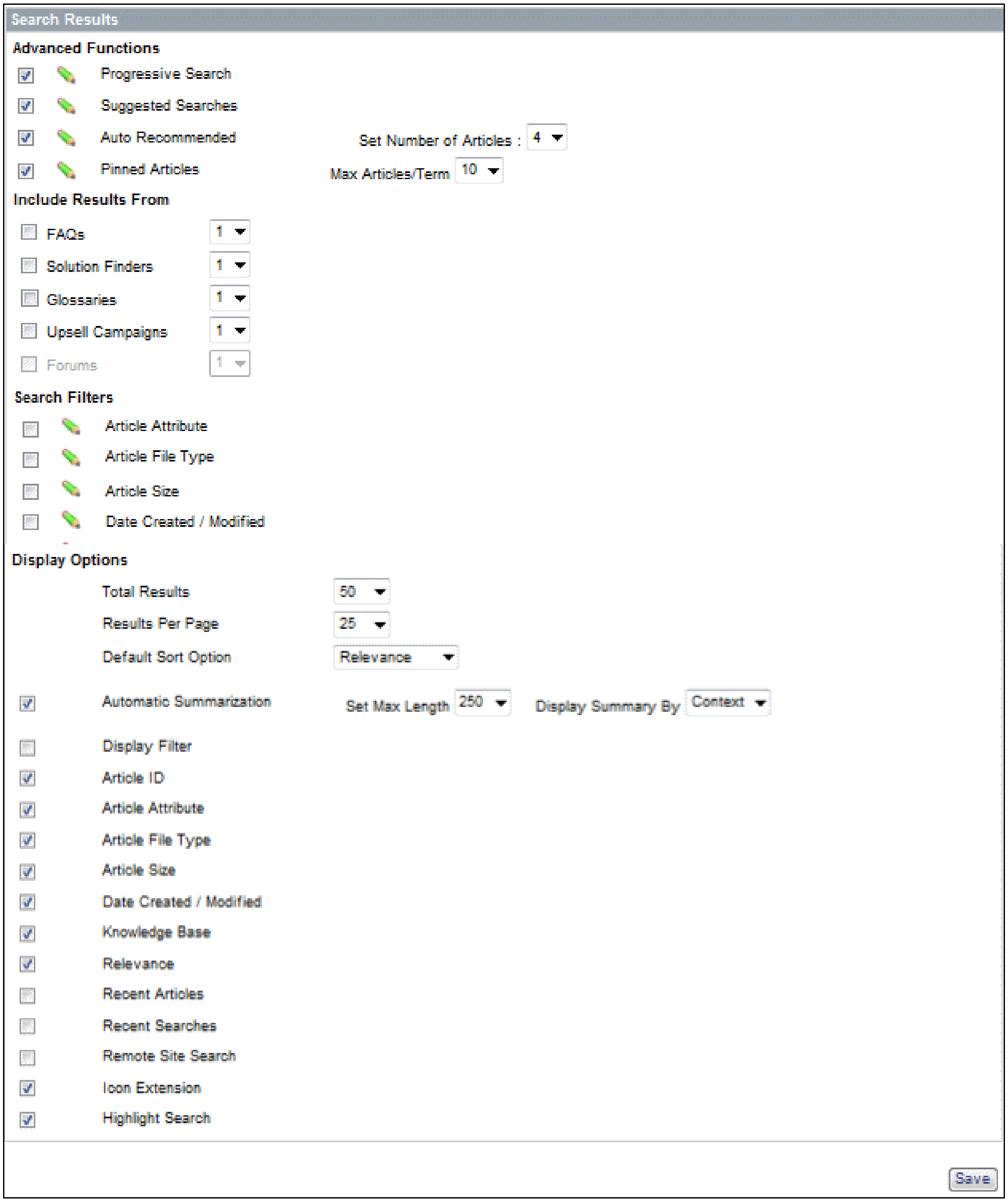


Figure 194 Portal Search Options Page Displayed for Portals Using Portal Style #1, #2, or #3

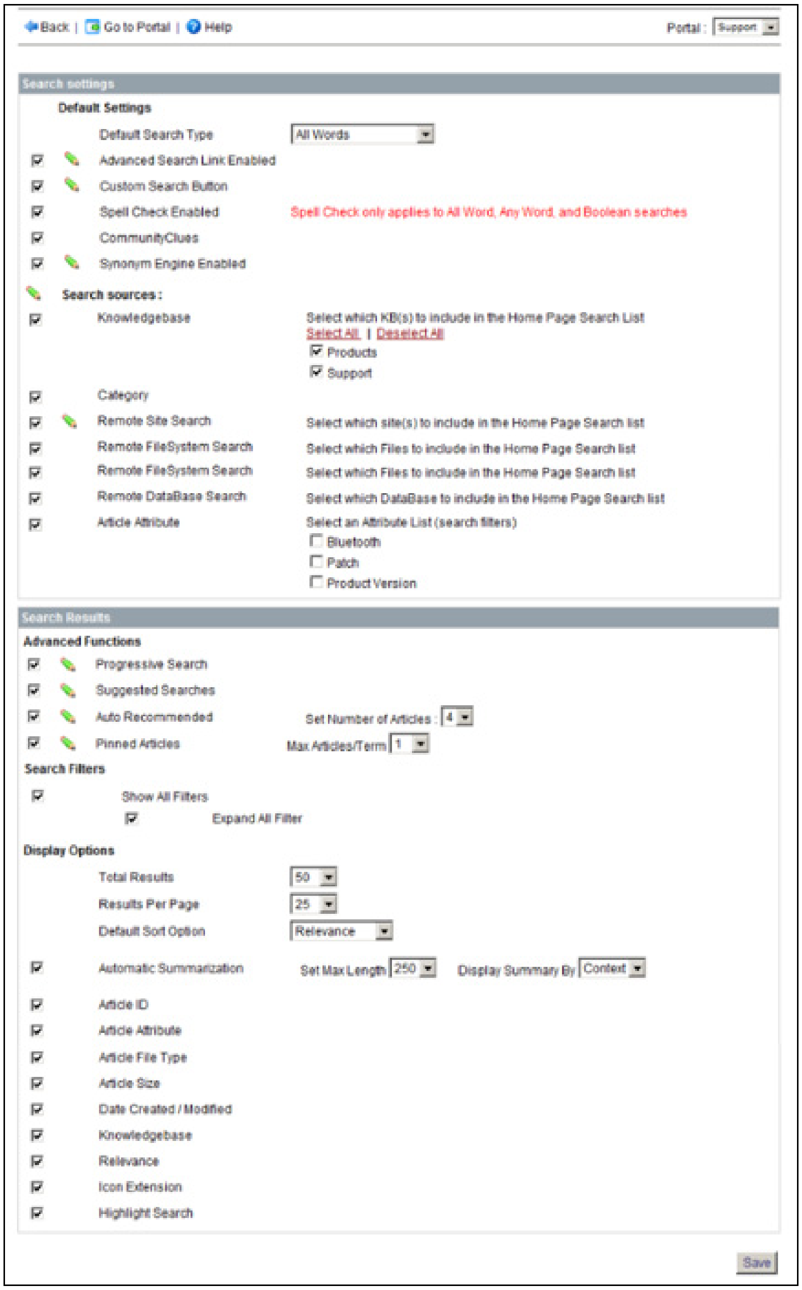


Figure 195 Portal Search Page Displayed for Portals Using Portal Style #4

The **Default Home Page Search** area on the Portal Search page lists various search functions that you can configure for the Portal. Portal users can use these search functions to refine a search operation. From the **Default Home Page Search** area, select the Search options that you want to provide to the users on the Portal.

The following table describes the options available in the Default Home Page Search area:

Option	Description
Default Search Type	The **Default Search Type** provides a list of search types that can be used by Portal users to search for Articles. From the **Default Search Type** list, select the search type that will be available by default on a Portal. For example, select **All Words** as the search type. When a user accesses the Portal and performs a search. The Articles are displayed based on the **All Words** search type. The following search types are available for selection: • **Reference Word**: You can assign reference words to an Article. When a Portal user types a reference word to search an Articles, the Articles associated with the specified reference word are displayed. • **All Words**: The 'All Words' search type utilizes the Boolean search operator 'AND'. For example, When a Portal User searches for the phrase 'network engineer'. The search results display the Articles with both words 'network' and 'engineer'. • **Any Word**: The 'Any Words' search type utilizes the Boolean search operator 'OR'. For example, When a Portal User searches for the phrase 'network engineer'. The search results display Articles that contain 'network' OR 'engineer'. • **Boolean**: The Boolean search type uses the Boolean operator "Or" to search for Articles. **For example**: When a Portal user searches for "domain controller" the search will return all Articles containing any of the two words. • **Exact Match Keyword**: You can assign Exact Match Keywords to an Article. For Example: when a Portal user types an exact keyword to search for Articles, the Articles associated with the specified keyword are displayed.

Option	Description
	• **Exact Phrase**: You can assign **Exact Phrase** as the default search type for a Portal. When a Portal user types an exact phrase to search for Articles, the Articles that exactly match the phrase searched for, including order of words and spaces in between are displayed. For example, when a Portal user searches for “network engineer”, results will contain only those Articles that have “network(space)engineer” within. This search is useful when you have an exact error message to look for, and Articles containing the exact error message exist. This search example will not return Articles that include the separate words 'network' or 'engineer'. This search also does not support stemming (i.e. 'network engineers', 'networks engineering', etc.) • **Natural Language**: The Natural Language Query search enables a Portal user to search for Articles by specifying a search query in the form of a sentence, or question. The search results displays the Articles by picking the important words and phrases in the search query. For example, when a Portal user performs a Natural Language Query search by specifying the search query as “What is state of the art in text retrieval?”, the system picks up **state art**, **text**, and **retrieval** as the important words to search for Articles.
Enhanced Numeric Search	You can enable Numeric Search for a Portal. Enhanced Numeric Search provides an option to perform numeric search in a Portal. When a Portal User performs Numeric Search in a Portal, the Articles matching with the Numeric ID are displayed on the Search results page. If there is no Article matching exactly the Numeric ID entered, the relevant Articles are displayed. For more information about the options available in the Numeric Search Options page, see **“Enhanced Numeric Search” on page 228**. Select the Enhanced Numeric Search option to enable Numeric Search for a portal.
Advanced Search Link Enabled	You can enable Advanced Search for a Portal. The Advanced Search is displayed in the Portal as a link. When a Portal User clicks the **Advanced Search** link, the **Advanced Search Options** page with a number of enhanced search options are displayed. When a Portal User performs search using this option, it displays more precise search queries and results. For more information about the options available in the Advanced Search Options page, see **“Advanced Search Options Page” on page 229**. **Note**: Click  adjacent to the **Advanced Search Link Enabled** option to specify a new label for the option.

Option	Description
Custom Search Button	You can configure a new label for the default Search button displayed on various pages on the Portal. Select the check box adjacent to the **Custom Search Button Enabled** option to display the custom Search button on the Portal. To configure a new label for the Search button, carry out the following steps: 1. Click adjacent to the **Custom Search Button** option. The Customize window is displayed. 2. In the **New Label** field, type a new label for the Search button and click **Save**.
Spell Check Enabled	You can enable the **Spell Check Enabled** option for a Portal, to perform a second search automatically on the Portal. When a Portal user performs a search, if there are no Articles matching the specified search term, a second search is automatically performed based on the first spell check term suggested by the Search Engine integrated with Knowledge Spaces™, and the search results are displayed on the Portal. For example, if a Portal user searches for Articles using the **tst** search term, and there are no Articles associated with the search term, the Search Engine integrated with Knowledge Spaces™ does a spell check and suggests similar search terms that can be used to search. For the term **tst**, the Search Engine may suggest search terms such as **test**, **tested**, etc. Knowledge Spaces™ will automatically pick up the **test** search term suggested by the Search Engine, searches for the Articles, and displays the search results on the Portal. **Note**: In the Spell Check Dictionary page of the Administration page, you can specify the ignored words for which the search engine will not suggest words.
CommunityClues	You can configure the Auto Recommend feature for a Portal. When a Portal User enters a search term in the search box, the similar search terms used by the other Portal Users are displayed on the Portal.The user can select the required search term from the list to perform the search. **Note**: The recent search terms that are displayed on the Portal depend on the frequency of the Scheduled task for Community Clues on each of the Portal Application servers.

Option	Description
Synonym Engine Enabled	You can enable a Portal to perform conceptual search..Select the **Synonym Engine Enabled** option to include Article results that contain words conceptually similar to the search term's synonyms, or the search terms in the search query specified by the Portal user. For example, "cat” and "feline" are conceptually the same, therefore you can enter them both as part of the same synonym engine entry. To enter new synonyms, enter related terms in one of the new synonyms fields, placing a comma between each unique term. Also, it is not necessary to create reciprocal relationships. By placing all related words in the same field as shown below, Knowledge Spaces will treat all words as if they mean the same. Examples: • LCD, Liquid Crystal Display, Monitor, Screen, Display. • UN, United Nations **Note**: You can add the Synonyms to be associated with a word from the Synonym Engine page of the Administration tab. After creating, editing, or deleting a Synonym or Ignored Word, the following steps must be performed for the changes to be effective: 1. From the **Administration** tab, click **Search Engine Administration**. The **Search Engine Administration** page is displayed. 2. In the **Clear Search Engine Content** section, select **All** from the drop-down list. 3. Click the **Clear** button and wait for the Search Engine to finish re-indexing. When the above steps are performed, Search will be unavailable until the documents are re-indexed into the Search Engine. Hence, carry out these additional steps when Search can be temporarily unavailable.

Option	Description
Search Cloud	You can configure a Portal to display Search Clouds on the Portal for **Top Daily Searches**, **Top Weekly Searches**, and **Top Favorite Articles** by selecting the **Search Cloud** option. When you enable **Search Cloud** for a Portal, the Portal Search Home page displays the **Top Daily Searches** and **Top Weekly Searches** areas listing the search terms associated with the top searched for Articles for the day, and the top searched for Articles for the week respectively. The Search Home page also displays the **Top Favorite Articles** area listing the Articles marked as Favorite by the users on the Portal. When you enable **Search Cloud** option for a Portal, the **Number of Search Terms** list is displayed. This list enables you to select the maximum number of search terms to be displayed in the Search Clouds for top searches on the Portal. You can set the number of search terms to be displayed as 5, 10, 15, 20, 25, or 30. **Note:** • The Articles listed in the **Top Favorites** area are different from the Articles listed in the **Hot Topics** area on the Search Home page. The Top Favorites Articles are marked by the Portal users as their favorites while the **Hot Topics** area lists the most viewed Articles. • This option is available only for Portals that have been designed using **Portal Style #1**, **Portal Style #2**, and **Portal Style #3**.
Search Using	You can configure a **Search Using** list with a set of search types to be displayed on the Portal. The available search types are: All Words, Any Word, Boolean, Exact Match Keyword, Exact Phrase, Reference Word, and Natural Language. From the **Search Using** list, a Portal user can select a search type to perform the search operation. For example, if you select the **All Words**, **Any Word,** and **Boolean** search types to be available in the **Search Using** list on the Portal, a Portal user can select any of these search types for the search operation. **Note**: • You can also customize the labels for the **Search Using** button, and the search types by using the button adjacent to each option. • This list is available only for Portals that have been designed using **Portal Style #1**, **Portal Style #2**, and **Portal Style #3**.

Option	Description
Search Sources	You can configure a **Search Sources** list with a set of Knowledge Bases to be displayed on the Portal. A Portal User can search for Articles by selecting an appropriate Knowledge Base within which the search must be performed. To configure a **Search Sources** list with Knowledge Bases to be displayed on the Portal, carry out the following steps: 1. Select the **Knowledge Base** option. The Knowledge Bases included are listed for selection on the Portal. 2. Select the Knowledge Base(s) to be available in the **Search within** list. **Note**: To customize the **Search Sources** button label, click adjacent to the button.
Remote Site Search	You can configure a list of Web sites that the Portal can access, and index in addition to searching standard Knowledge Base content. The Remote Site Search is only available for Website (HTML) content. To configure a list with websites to be displayed on the Portal, carry out the following steps: 1. Select the **Remote Site Search** option. The websites created in the Remote Site Search page of the Portal tab area are listed for selection. 2. Select the Web sites to be available in the **Remote Site Search** list. **Note**: • Remote Search is a licensed feature, and can be purchased from Knowledge Spaces™ separately as an add-on module. • The Remote Site Search feature performs best when indexing static HTML Web sites. Sites with scripting can be indexed, however indexing cannot distinguish between words in content and words in script and therefore search results might contain results other than pure content.
Remote FileSystem Search	You can configure a list of File Systems that the Portals can index in addition to the standard Knowledge Base content. To configure a list of File Systems to be displayed on the Portal, carry out the following steps: 1. Select the **Remote File System Search** option. The File systems created in the Remote Files Search page of the Portal tab area are displayed for selection. 2. Select the File Systems to be available in the **Remote File System Search** list. **Note**: Remote File System Search is a licensed feature, and can be purchased from Knowledge Spaces™ separately as an add-on module.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Remote DataBase Search</td><td>You can configure a list of external Databases that the Portals can spider and index in addition to the standard Knowledge Spaces content.

To configure a list of Remote Databases to be displayed on the Portal, carry out the following steps:
1. Select the Remote DataBase Search option. The databases created in the Remote DB Search page of the Portal tab area are listed for selection.
2. Select the databases to be available in the Remote DataBase Search list.

Note:
• Remote DataBase Search is a licensed feature, and can be purchased from Knowledge Spaces™ separately as an add-on module.
• This list is available only for Portals that have been designed using Portal Style #1, Portal Style #2, and Portal Style #3.</td></tr>
<tr><td>Article Attributes</td><td>You can configure the Portal to display various Article Attribute lists. A Portal user can refine a search for Articles by selecting an Attribute from an Article Attribute list. The search results page displays the Articles associated with the selected Article Attribute.

To configure an Article Attribute list, carry out the following steps:
1. Select the Article Attribute option within the Default Home Page Search area. The Article Attribute lists created in Knowledge Spaces™ Admin Control Panel are displayed for selection.
2. Select the Article Attribute list to be available on the Portal.</td></tr>
</table>

The **Search Results** area on the Portal Search page provides various options to customize the Search Results page displayed on the Portal. When a Portal user searches for Articles by selecting available options on the Search Home page, the Articles are searched for, and listed on the Search Results page. The information displayed on the Search Results page depends on the options you have configured in the Search Results area of the Portal Search page.

From the **Search Results** area, select the required options based on how you want the information to be displayed on the Portal's Search Results page.

The following table describes the options available in the Search Results area of the Portal Search page:

Option	Description
Advanced Functions	Knowledge Spaces™ provides advanced functions that you can enable for a Portal. The Advanced Functions available are: • **Progressive Search**: You can enable a Portal to perform a search within a set of search results, the Articles are searched for and listed on the Portal Search Results page. The user can further refine the results by performing additional search operations against the current results. This is efficient for retrieving an exact search result on the Portal. • **Suggested Searches**: You can enable a Portal to perform Suggested Search. When a Portal User performs search on the Portal, the Search Results displays the Articles and also Knowledge Spaces™ suggests links to other search topics related to User's search criteria. • **Auto Recommended**: You can enable a Portal to perform Auto Recommended search. When a Portal User performs search on the Portal, the Knowledge Spaces displays hyperlinks between Articles based on the conceptual understanding of the Article content and the user's query. When the User views the content of an Article, the links to the Recommended Articles are displayed on the Article content page. You can set the number of Recommended Articles to be displayed for an Article. Select the **Auto Recommended** option, and from the **Set Number of Articles** list displayed, select the number of Recommended Articles to be displayed for an Article. The available options are 1, 2, 3, 4, and 5. **Note**: You can also customize the labels of the Advanced Functions, by using the  button adjacent to each function. • **Pinned Articles**: You can enable a Portal to perform Pinned Article search, when a Portal User searches for Articles by using the **All Words**, **Any Words**, **Exact Phrase**, or **Natural Language** search type and the search string specified by the user matches a Pinned Articles Term, the Articles pinned to the Term are listed at the top of the Portal Search Results page. The Pinned Articles are listed on the Portal regardless of whether they are found by the search engine. Each Pinned Article listed on the Portal will display the Article's title and the Manual Summary if associated with the Article.

Option	Description
Include Results From	You can enable a Portal to perform search in the other modules. You can configure Knowledge Spaces to search other modules as well and display results on the Portal Search Results page. **Note**: The **Include Results From** section is available only for Portals that have been designed using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
	You can enable a Portal to perform Frequently Asked Questions (FAQs) based search. You can also set the maximum number of FAQs that can be displayed on the Search Results page. This number ranges from 1 to 5. When a Portal user performs a search, the Articles that match the search query are listed in the **Article Search Results** area, and the FAQs that match the search query are listed in the **FAQ Search Results** area on the **Search Results** page.
	You can enable a Portal to perform **Solution Finder** based search. You can set the maximum number of Solution Finders that can be displayed on the Search Results page. This number ranges from 1 to 5 When a Portal user performs a search operation, the Articles that match the search query are displayed in the **Article Search Results** area, and the Solution Finders that match the search query are displayed in the **Solution Finder Search Results** area on the Search Results page.
	You can enable a Portal to perform **Glossaries** based search. You can set the maximum number of Glossaries that match the search query and can be displayed on the Search Results page. This number ranges from 1 to 5. When a Portal user performs a search operation, the Articles that match the search query are displayed in the **Article Search Results** area, and the Glossaries that match the search query are displayed in the **Glossary Search Results** area on the Search Results page.
	You can enable a Portal to perform **Upsell Campaigns** based search.The **Upsell Campaigns** are the advertisements. You can set the maximum number of advertisements that match the search query to be displayed on the **Search Results** page. When a Portal user performs a search operation, the Articles that match the search query are displayed in the **Article Search Results** area, and the Advertisements that match the search query are displayed in the **Advertisement Search Results** area on the Search Results page.
	You can enable a Portal to perform Forum based search. Forums are the discussion threads, you can set the maximum number of discussion threads that can be displayed on the Search Results page. When a Portal user searches for Articles, the Articles that match the search query are displayed in the **Article Search Results** area, and the discussion threads that match the search query are listed in the **Forum Search Results** area on the Search Results page.

Option	Description
Search Filters	• The **Search Filters** section on the Search page of a Portal Style #1, #2, and #3 Portal enables you to configure various Search filters to be listed on the Search Results page of the Portal. The Search filters enable the Portal users to refine the search operation. The Portal Users can select the required filters to search for specific Articles from the Articles listed on the Search Results page. The Search filters that you can configure to be listed on the Portal are: **Article Attribute**: Select this option to display the Article Attribute filter on the Search Results page of the Portal. The Article Attribute filter lists the Article Attribute lists that you have configured to be available on the Portal. **Article File Type**: Select this option to display the Article File Type filter on the Search Results page of the Portal. The **Article File Type** filter lists the File types that are added in the System Settings page of the Administration tab. A Portal user can select a file type to search for Articles of the selected file type. **Article Size**: Select this option to display the Article Size filter on the Search Results page of the Portal. The Article Size filter on the Portal lists various file sizes for selection. A Portal user can select a file size to search for Articles of the selected file size from the Articles listed on the Search Results page. The file size options available for selection are **Any**, **<50K**, **<100K**, **<200K**, **<500K**, and **<1MB**. **Category**: Select this option to display the **Category** filter on the Search Results page of the Portal. **Date Created/Modified**: Select this option to display the **Date** filter on the Search Results page of the Portal. The Date filter enables a Portal User to search for Articles created on a specific date, or Articles modified on a specific date. **Knowledge Base**: Select this option to display the **Knowledge Base** filter on the Search Results page of the Portal. The **Knowledge Base** filter on the Portal lists the Knowledge Bases that you have configured for the Portal. **Note**: You can also customize the labels of the Search filters, by using the button adjacent to each Search filter. • The **Search Filters** section on the Search Options page of a Portal Style #4 Portal enables you to configure the display of the **Refine All Results** pane on the Portal. If the **Show All Filters** option in the **Search Filters** section is enabled for a Portal, the Refine All Results pane is displayed on the Search Results page of the Portal. In addition, the **Expand All Filter** option in the **Search Filters** section enables you to configure the display of the Search Filter widgets expanded or collapsed in the Refine All Results pane. If the **Expand All Filter** option is enabled, the Search Filter widgets are expanded and displayed in the Refine All Results pane of the Portal. The Portal user can further manually expand or collapse a widget by using the , or button respectively in a widget.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Display Options</td><td>The Display Options enable you to configure the way you want the search results to be displayed on the Portal Search Results page.
You can configure the following Display Options for a Portal are:
• Total Results: This option enables you to set the total number of search results that can be displayed on the Search Results page. You can specify the number of results to be 5, 10, 25, 50, 75, 100, 150, or 200.
• Results Per Page: This option enables you to set a limit for the number of search results that can be displayed in a page. You can set the results per page to be 5, 10, 15, 20, 25, 50, 75, 100, 125, 150, 175, or 200.
• Default Sort Option: This option enables you to set the default sort option based on which the Articles are sorted, and listed on the Search Results page.
The Sort Options available are:
• Relevance - The Articles listed on the Portal Search Results page are sorted by Relevance to the user’s search query.
• Modified Date - The Articles listed on the Portal Search Results page are sorted based on when each listed Article was last modified.
• Article Rating - The Articles listed on the Portal Search Results page are sorted based on the rating given by the Portal users to the Articles.
• Article Title - The Articles listed on the Portal Search Results page are sorted in the alphabetical order of the Article Title.</td></tr>
<tr><td>Automatic Summarization</td><td>You can enable a Portal to display a summary for each of the Articles displayed on the Portal Search Results page.When you enable Automatic Summarization for the Portal, the Display Summary By list is displayed to enable you to configure the type of synopsis to be displayed for the Articles on the Portal.
The following options are available in the Display Summary By list:
• Context - Select this option to display the most relevant content within the Article as the synopsis on the Portal.
• Quick - Select this option to display the first ‘n’ number of characters in the Article content as the synopsis on the Portal. n is the maximum number of characters you have configured to be displayed for an Article on the Portal.
• Manual - Select this option to display a User specified synopsis for the Article on the Portal.
Note: If the Manual option is selected for a Portal, when a Portal user performs a search, the Articles are listed on the Search Results page with User specified summaries. Summaries generated by Knowledge Spaces™ are displayed for Articles that do not include User specified summaries.
When you enable Automatic Summarization for the Portal, the Set Max Length list is displayed to enable you to select the maximum length for the Article Summary. You can limit the length of the Article Summary to be 50, 100, 150, 200, or 250 characters.
Note: If the Automatic Summarization option is enabled, the Show Summaries option is displayed next to the list of Articles on the Portal.
The Portal user can select this checkbox to view the synopsis of the Articles.</td></tr>
</table>

Option	Description
Display Filter	You can enable a Portal to display the Search Filters pane on the Article Search Results page. Additionally, the **Show Filters** checkbox is displayed next to the Search Filters pane on the Portal. The Portal user can select the **Show Filters** option to view the Search Filter pane on the Portal. **Note**: This option is available only for Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
Article ID	You can enable a Portal to display the Article ID of the Articles displayed on the Portal Search Results page.
Article Attribute	You can enable a Portal to display the Article Attribute(s) with the Articles displayed on the Portal Search Results page. If there are Attributes associated to an Article, the Attributes are displayed with the Article on the Portal Search Results page.
Article File Type	You can enable a Portal to display the File Type details for the Articles displayed on the Portal Search Results page.
Article Size	You can enable a Portal to display the File size details for each of the Articles displayed on the Portal Search Results page.
Date Created/Modified	You can enable a Portal to display the date created, or modified details for each of the Articles displayed on the Portal Search Results page.
Knowledge Base	You can enable a Portal to display the Knowledge Base(s) and the associated Articles on the Portal Search Results page.
Relevance	You can enable a Portal to display the relevance of the Articles listed on the Search Results page.
Recent Articles	You can enable a Portal to display the titles of the last five Articles searched for, and viewed by users on the Portal. **Note**: This option is available for Portals that have created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
Recent Searches	You can enable a Portal to display the search queries of the last five searches on the Portal Search Results page. **Note**: This option is available for Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
Remote Site Search	You can configure a list of Web sites that the Portal can access, and index in addition to searching standard Knowledge Base content. Select this option to display the list of web sites from which the Articles are searched for, and listed on the Search Results page. **Note**: This option is available Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
Icon Extension	You can enable a Portal to display the File Extension icons associated with the Articles listed on the Portal Article Search Results page.

Option	Description
Highlight Search	If the **Highlight Search** option is enabled, the keywords, and phrases entered by the Portal users are highlighted within the Articles when a user clicks through, and views the Article. The user has the option of removing the highlighting from the Article view. **Note**: This option is available for Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**. The search words get highlighted in articles formatted and saved as HTML files, as well as MS Word and Excel source files converted to HTML. Search words in other document formats, or other formats converted to HTML do not get highlighted.

Enhanced Numeric Search

A Portal User can search for an Article using a Numeric ID. The Numeric ID search option enables the Portal user to search for Articles.

The Numeric ID Search option is available as Enhanced Numeric ID, search setting option on the Search Settings page of Knowledge Spaces™ Admin Control Panel. When an Administrator selects the Enhanced Numeric ID option, the Enhanced Numeric ID Search is enabled for a Portal. Enhanced Numeric ID option is available for the Portals created using Portal Style#4.

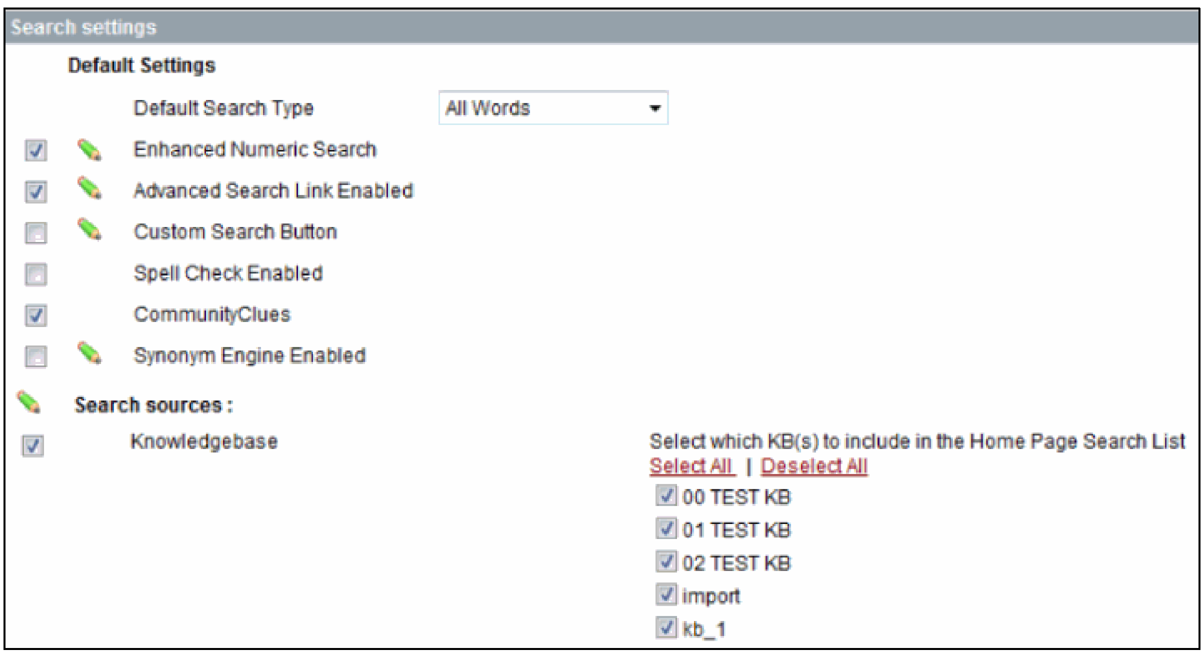


Figure 196 Enhanced Numeric Search for Portal Style #4

The search results are displayed based on the Numeric ID entered. It enables the user to quickly search for an Article. If the Numeric ID entered by the user does not match the Article ID, the relevant results are displayed.

Editing the Display Labels in Numeric Search Page

You can edit the display labels that are displayed on the Portal page.

To edit the display labels, carry out the following steps:

1. On the Portal Modules page of Knowledge Spaces™ Admin Control Panel, select **Search Options,** and click button. The **Edit the Display Labels to be Used When a Numeric Match is Found** page is displayed.

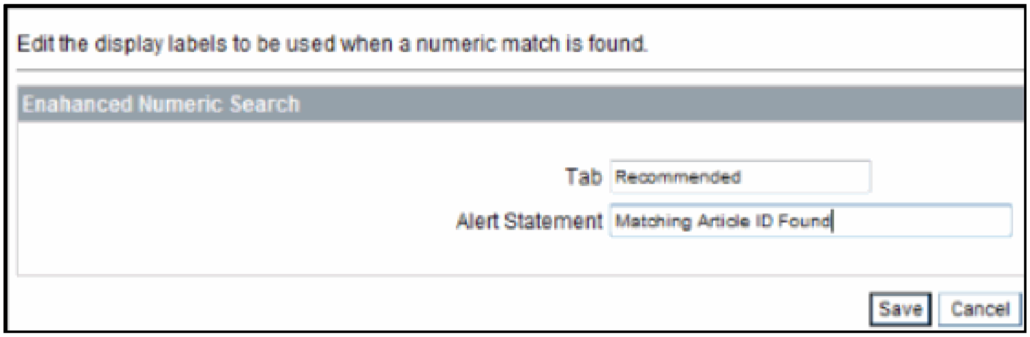


Figure 197 Enhanced Numeric Search Page-Editing Display Labels

Option	Description
Tab	This is the name of the tab displayed in the Numeric Search Results page on a Portal, when a Portal user performs Numeric Search. You can edit this, and enter a name of your choice for the tab.
Alert Statement	This is an alert statement displayed when a Portal User performs Numeric ID search on a portal. You can edit this and enter a statement of your choice.

2. Edit the tab name for the tab in the **Tab f**ield.
3. Edit the Alert Statement.
4. Click **Save** to save the changes

Advanced Search Options Page

A KB Portal user can work with the **Advanced Search** link to locate KB Articles that match the search query. The **Advanced Search** options enables the user to fine tune the search mechanism to view the required KB Article(s). The **Advanced Search** option is available as a link on the Portal Search page. When the user clicks the link, the **Advanced Search Options** page is displayed.

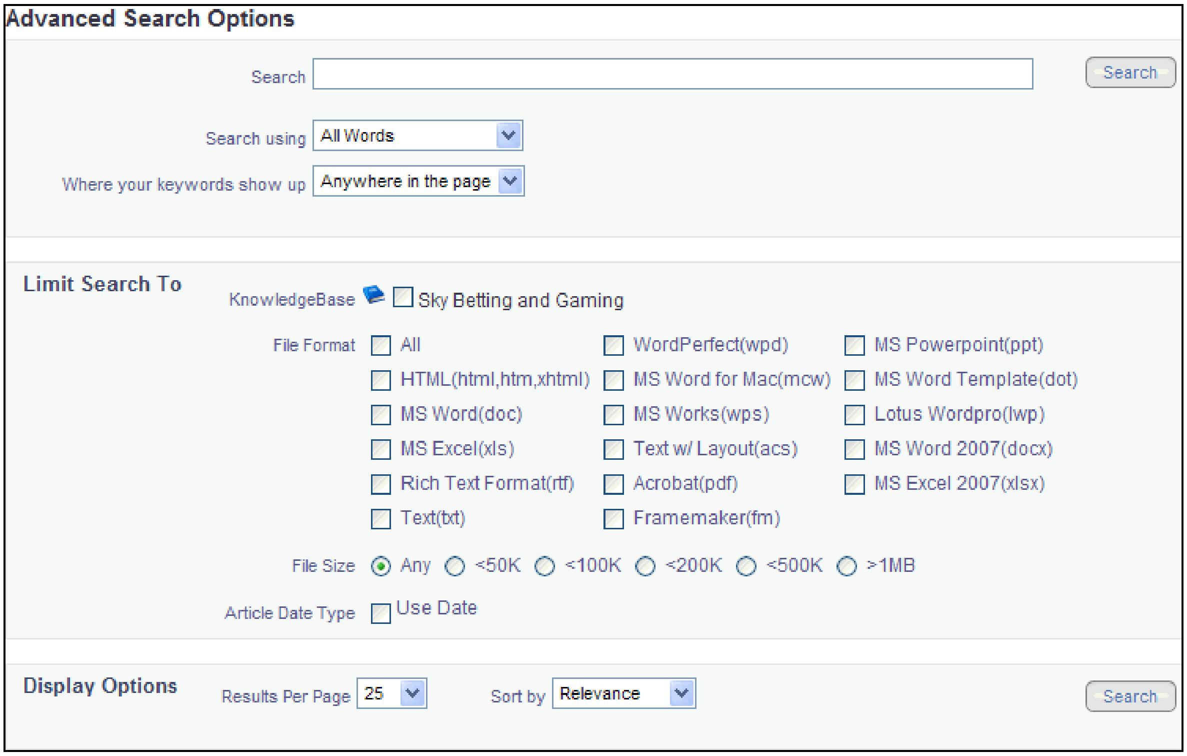


Figure 198 Advanced Search Options Page For Portals Using Portal Style #1, #2, #3

KB Articles displayed as a result of the search operation are based on configurations in the **Advanced Search Options** page. The following table describes the options available to the user in the **Advanced Search Options** page:

Option	Description
Search	Enables a Portal User to perform String based search on the Portal. When a Portal user type a string, the Articles are displayed based on the string entered.The User can select one of the following options: • **All Words**: KB Articles displayed as a result of selecting this option will include all the words of the search string. For example, consider a scenario where the Portal user searches for the phrase 'network engineer'. The search will yield results with all Articles that have the words 'network' and 'engineer'. • **Any Word**: KB Articles displayed as a result of selecting this option will include any word the user types in the **Search** field. The 'Any Words' search keyword utilizes the Boolean search type **'OR'**. For example, a user searches for the phrase 'network engineer'. The search will yield results with all Articles that contain 'network' OR 'engineer' within them. The search type looks for at least one of the words contained in any of the Articles. **Note**: When the **Any Word** option is selected, the user can click the **Wild Card** check box. This enables the user to specify the * (asterisk) wild card character in the **Search** field.

Option	Description
	To use the wild card search, a user can suffix a word with an asterisk (*) to get words in the pattern of the search keyword(s) entered. For example, comp* will return computer, comparison, and company. • **Boolean**: When this option is selected, the **Custom Boolean Query** option is displayed in place of the **Search** option. The user can specify the search query in the **Custom Boolean Query** field. In addition, the following fields are displayed: • **All these words**: In this field, the user can specify the important words from the search query. KB Articles with all the words specified in this field are searched for and listed. • **Any of these words**: In this field, the user can specify the important words from the search query. KB Articles with any word specified in this field are searched for and listed. • **Not these words**: In this field, the user can specify the words from the search query that have to be ignored during the search operation. KB Article(s) that do not include the specified words are searched for and listed. **Note:** The User must enter text correctly in the above fields. For example, incorrect results will be displayed if the user specifies the word **Support** in the **All these words**, and in the **Not these words** fields.
	• **Exact Match Keyword**: The KB Articles displayed as a result of selecting this option will include exact text specified in the **Search** field.The User can click the **Case Sensitive** option to list KB Article(s) in which the text matches the case of the search string. • **Exact Phrase**: The KB Article(s) displayed as a result of selecting this option will include the exact phrase specified in the **Search** field. The User can click the **Case Sensitive** option to list KB Article(s) in which the text matches the case of the search string. • **Natural Language**: The KB Article(s) displayed as a result of selecting option will include important keywords from the search sentence are searched for, and displayed.
Where your keywords show up	Enables the User to specify the area in the KB Article(s) where the typed search string must be located. The User can select one of the following options: • **Article Content only**: KB Articles displayed by selecting this option will display only the content in which the search string is available. • **Article Title Only**: KB Articles displayed by selecting this option will display only the Article title in which the search string is available. • **Anywhere in the page**: KB Articles displayed by selecting this option will display the content of the Article or the title of the Article in which the search string is available.
File Format	The File Format area lists the file types added in the System Settings page of the Administration tab. A user can select the required file types to search for Articles of the selected file type.

Option	Description
File Size	The user can select one of the following options to search for Articles of a specific File Size: • Any • <50K • <100K • <200K • <500K • >1MB • For the options **<50** through **<500K**, KB Article(s) whose size does not exceed the selected option are displayed. • For the **>1MB** option, only those KB Article(s) whose size exceeds 1 MB are displayed
Article Date Type	When the user clicks the **Use Date** check box, the following options are displayed: • **Created**: The user must specify a date range in the **From**, and **To** date controls. KB Article(s) created in the specified range will be searched for and listed. • **Modified**: The user must specify a date range in the **From**, and **To** date controls. KB Article(s) modified in the specified range will be searched for and listed. **Note**: In the ***To*** control the user cannot specify a date that is prior the date in the ***From*** control.
Results per page	Enables the user to set the number of KB Article(s) to be displayed per page. The user can select from the value **10**, through **100**, in intervals of **5**. **Note:** If the count of KB Article(s) exceeds the page size, additional KB Article(s) are displayed on subsequent pages.
Sort By	The User can select KB Article(s) to be displayed based on one of the following options: • **Relevance** • **Article Title** • **Rating** • **Modified Date**

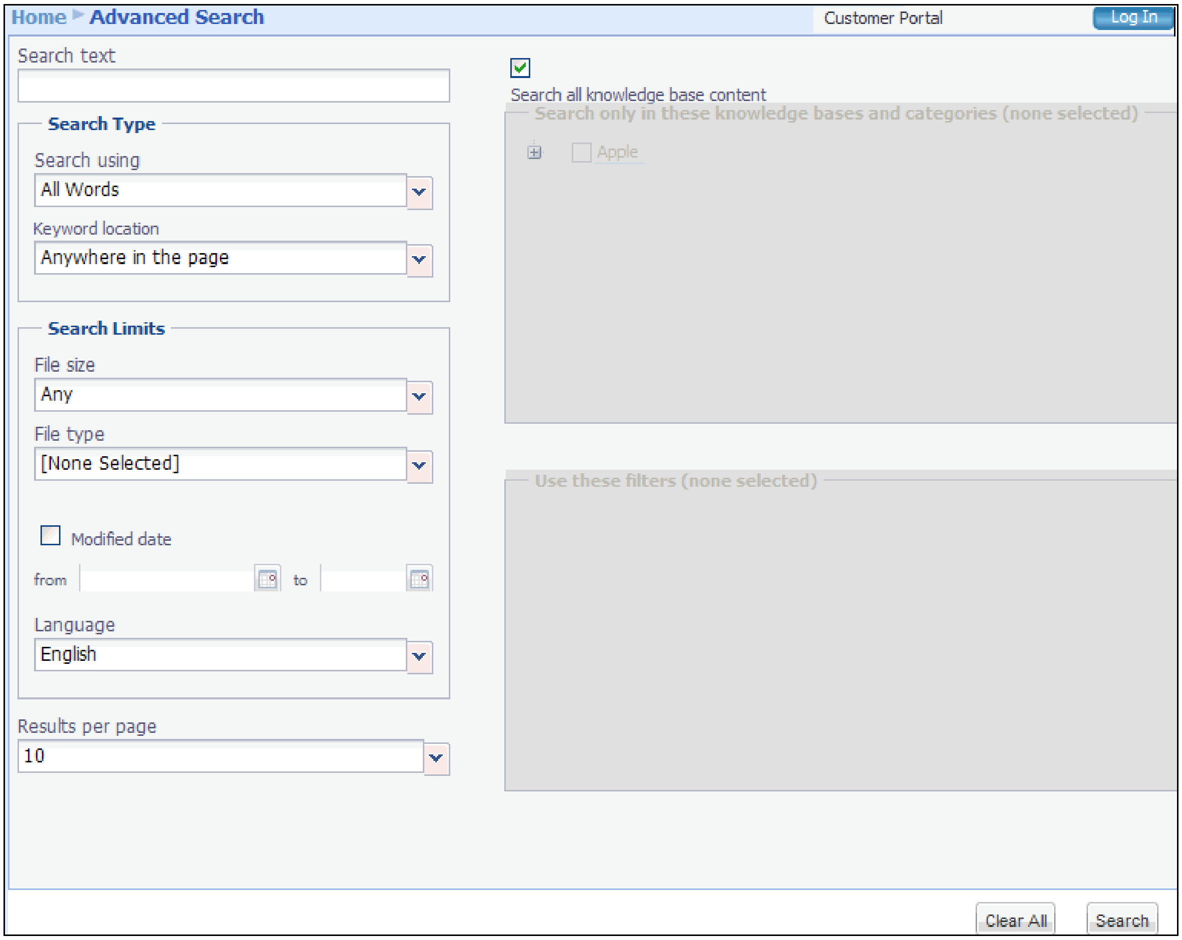


Figure 199 Advanced Search Page For Portals Using Portal Style #4

When the user has completed defining the search options, the user must click the **Search** to perform the search operation.

> **Note:**
>
> For information about the Advanced Search Page in Portals using Portal Style #4, see Spaces by Moxie ™ Knowledge Spaces ™ 9.4Portal User Guide.

Category Browsing

When you enable **Category Browsing**, your Knowledge Bases and categories appear in the left pane. The Portal users can browse to an Article belonging to the category..

> **Note:**
>
> You can order your Articles in the categories from the Category Management area of the Content tab in Knowledge Spaces™ Admin Control Panel.
>
> If you disable Category Browsing, the search tools do not display Category Browsing in the Portal.

Hot Topics

You can provide a quick link above the Category Browsing area, called **Hot Topics**. When users click **Hot Topics link,** the most viewed Articles are displayed.

To enable or customize the Category Browsing feature, click **Browse Options**.

To add the **Hot Topics** feature to your Portal, Select **Most Popular Articles option. You can also set the number of Articles to display using the menu.**

Click **Save** after making the required selection.

.

> **Note:**
>
> The **Browse Options** feature is available only for Portals designed using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.

Uncategorized Articles

You can also enable/disable the option to display Knowledge Spaces Articles which are not Categorized. These Articles are displayed when a Knowledge Base has been selected, prior to selecting a Category. You also have the option to select how many Uncategorized Articles will display.

Configuring the Personalization Tab for a Portal

For a Secure, or Personalized Portal, you can configure the display of the Personalization tab on the Portal with information about the **Favorite Articles**, **Last Searched Articles**, and **Last Viewed Articles** of the External User logged on to the Portal.

> **Note:**
>
> This feature is available for the Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.

To configure the Personalization tab for a Portal, carry out the following steps:

1. On the **Portal Modules** page of the Portal, select the **Personalization** option, and click the **Personalize Options** link. The Top Personalization page is displayed.

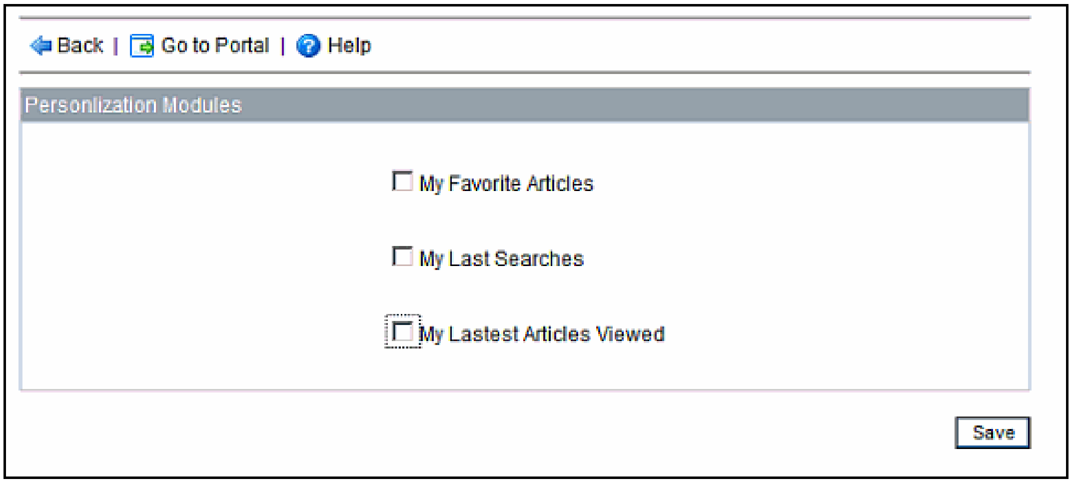


Figure 200 Top Personalization Page

2. Select the required options based on the information you want to display to the External User on the Personalization page of the Portal.
   - If you select the **My Article Favorite** option, the **My Favorite Articles** area on the Portal Personalization page displays a list of Favorite Articles of the logged on External User.
   - If you select the **My Last Search** option, the **My Last Searches** area on the Portal Personalization page displays the search terms associated with the Articles last searched for by the logged on External User.
   - If you select the **My Last Article View** option, the **My Latest Articles Viewed** area on the Portal Personalization page displays a list of the latest Articles viewed by the logged on External User.
3. Click **Save**.
4. Click **Save** on the Portal Modules page.

The following figure shows the Personalization page on the Portal with the **My Favorite Articles**, **My Latest Articles Viewed**, and **My Last Searches** areas:

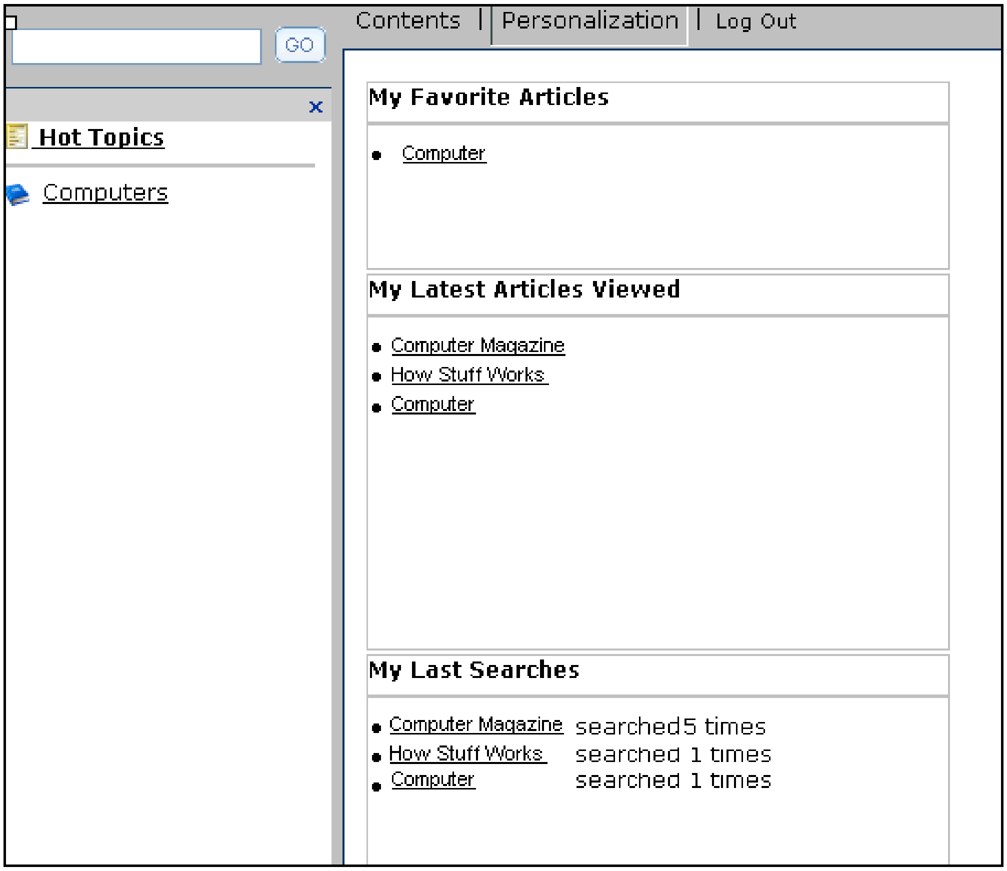


Figure 201 Personalization Page on The Portal

FAQ - Advanced FAQ Settings

The FAQ settings enable you to enable, and disable the Top Ten FAQ listing. Click **FAQ Options** to view the **Advanced FAQ Settings** section.

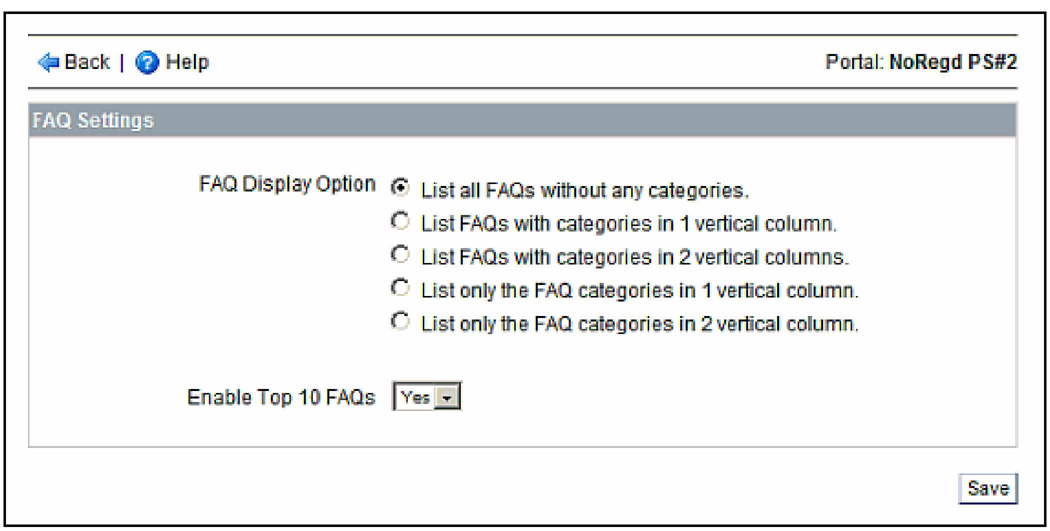


Figure 202 FAQ Settings Page

In the **FAQ Display Option** area, you can select one of five choices to display the FAQ in the Portal. The choices are based on the Categories that you created in the FAQ Management area of your administrative Portal. You can choose to list FAQ without Categories, with Categories, just the FAQ Categories alone, and display the FAQ when the User clicks the Category names. You can choose to display the FAQ in one or two vertical columns.

The Top Ten FAQ setting is a dynamically generated list of the ten most popular FAQs. When Knowledge Base users click on an FAQ in the Portal, the FAQ will move up in the list. The Top Ten FAQ list always displays the ten most requested FAQ and is updated immediately, whenever an FAQ is clicked. You can view hit statistics on all of your FAQs in the **FAQ Reports** area in the Reports module.

After configuring FAQ settings, click **Save**. You can cancel the operation at any time by clicking the **Cancel** button.

Note:

The **List only the FAQ categories in 1 vertical columns**, **the List only the FAQ categories in 2 vertical column**, and **Enable Top 10 FAQs** options are not available for Portals using Portal Style #4.

Solution Finder Option- Solution Finder Access

When you click the **Solution Finder Options** link on the Portal modules page, you can determine which of your Solution Finders can be accessed through this KB Portal.

You can choose which Portals can access which Solution Finders.

Select the check box in the **Include** column next to the Solution Finders to enable the Portal to access these Solution Finders. When users access the Solution Finder using this Portal, they can only search and view the Solution Finders, including the choices and Articles within the Solution Finders that you select in this section.

Example

- You have setup two Portals one for the billing department, and one for the shipping department. You have two Solution Finders, one to help with importing a customer into the billing system, and one for shipping a package by UPS.
- When you are configuring the billing department Portal, limit the access to the billing Solution Finder only when you are configuring the shipping department's Portal, limit the access to the UPS Solution Finder only. When the users logs on to the Portal, the user will have access to the appropriate Solution Finder that applies to the job.

Notes:

- If there is an Article in a Solution Finder that is accessible through a Portal, and that Article is housed in a Knowledge Base that is not accessible through the Portal, that specific Article will not be displayed in the Solution Finder.
- For more information about Solution Finders, see **“Solution Finder” on page 134**.

Glossary Option

The **Glossary Options** area lists the Glossaries defined in the **Glossary** option from the **Content** tab. You can select the Glossary or Glossaries you want to associate with a particular Portal. For more information, see **“Glossary” on page 148**.

Automatic Ticket Resolution

The Automatic Ticket Resolution (ATR) module provides a way to answer customer questions before the customer sends a question or opens a ticket by email.

Using the ATR, the customers can fill a form, enter their question or problem, and submit the request. Knowledge Spaces checks the question, and automatically provides a list of answers to the question. At that point, the customer can indicate that the issue has been resolved, or the customer can proceed with submitting the question. If the customer chooses to proceed with the question submission, the fields and the question are sent as an email message to the email address of your choice.

Using the ATR

You can configure the ATR from the Portal Modules area. After you select the Portal, you can add the ATR by checking the check box to the left of **Automatic Ticket Resolution**, then by clicking **Save** at the bottom right of the Portal Modules page. The ATR is added as a tab, like the FAQ or Solution Finder on the Portal.

Adding and Configuring ATR Tab

1. Select the **Portal t**ab.

   The existing Portals are displayed.
2. Click the required Portal name link.
3. In the **Portal Modules** area, click **Configure**.

   The existing Portal Modules are displayed.
4. Select the **Automatic Ticket Resolution** option.

   Configure the ATR Tab Text.

   You can configure the text to be displayed in the ATR tab. To do so:
5. Click the next to the Automatic Ticket Resolution Portal module.

   The **Edit Automatic Ticket Resolution** window is displayed.

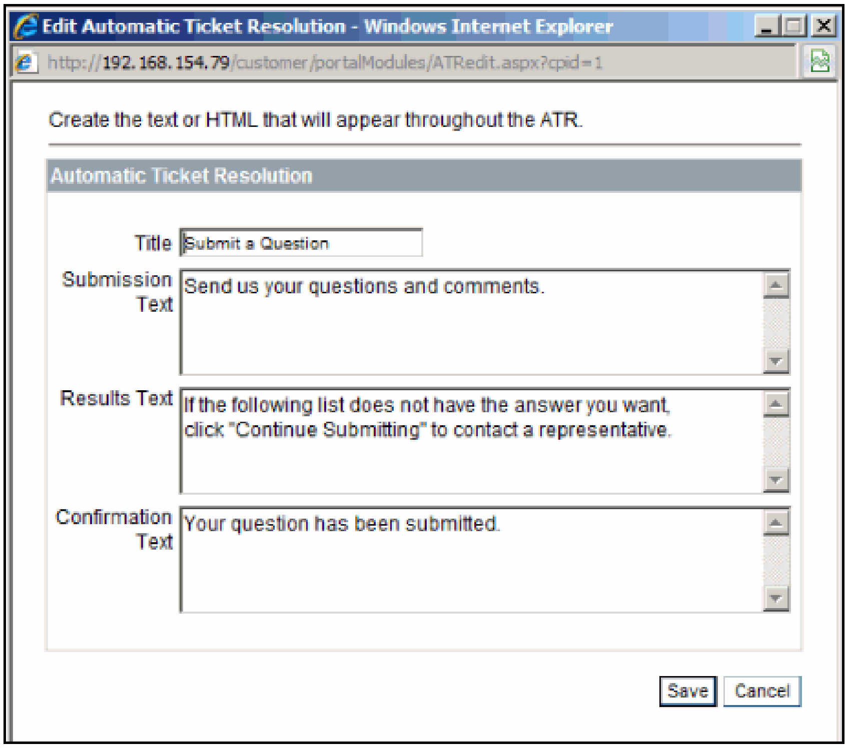


Figure 203 Edit Automatic Ticket Resolution Window

6. In the **Title** field, enter the title of the ATR tab. Common titles can be 'Ask a Question', or 'Open a Ticket'.
7. In the **Submission Text** field, enter the text to display as a heading in the ATR tab form.
8. In the **Results Text** field, enter the text to be displayed in the form as an instruction to the Portal user when the KB Articles are retrieved and listed in the ATR tab.
9. In the **Confirmation Text** field, enter the confirmation text to be displayed after the Portal user has submitted a form in the ATR tab.
10. Click **Save**.The information is saved, and the **Edit Automatic Ticket Resolution** window is closed.

> **Note**
>
> You can also use HTML markup text while configuring the ATR tab fields.

Configure the ATR Tab Options

You can configure E-mail settings, data fields, and file upload ATR options. To do so:

11. Click the **ATR Options** link in the Portal Modules page. The **Automatic Ticket Resolution Settings** page is displayed.

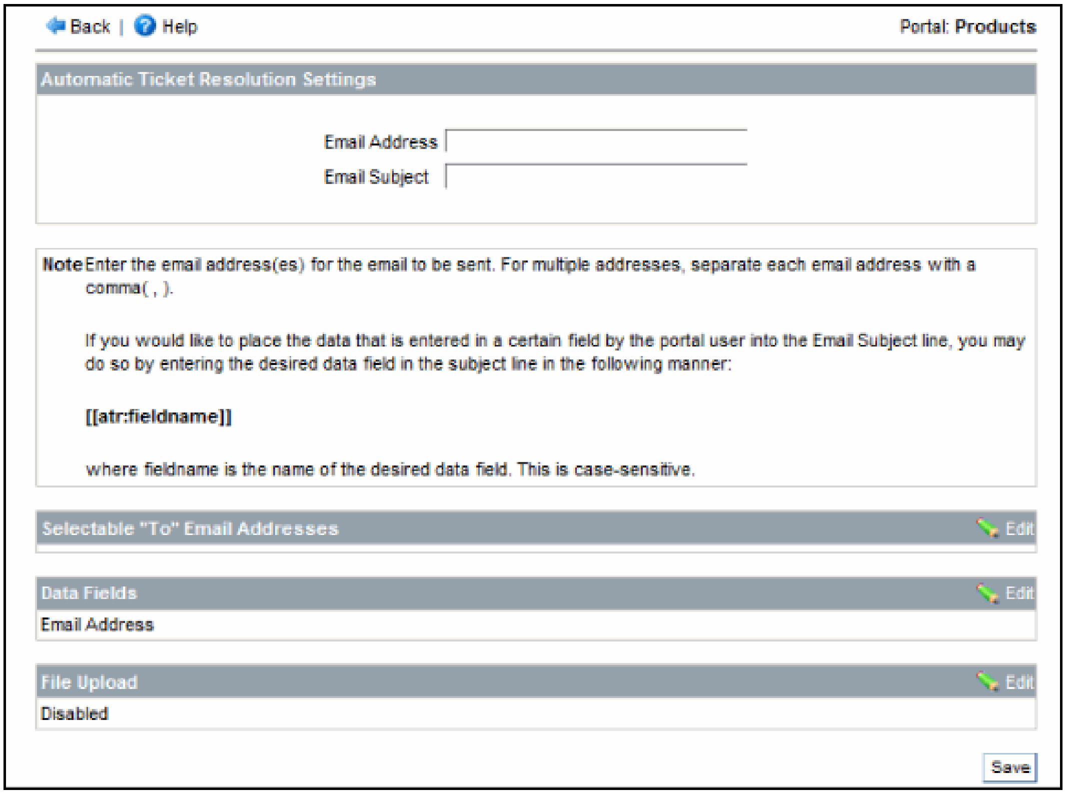


Figure 204 ATR Settings Page

12. In the **Email Address** field, enter the E-mail address or E-mail addresses where you want the visitor's request or question to be sent (for example, support@yourcompany.com). Multiple addresses must be separated with a comma (,).
13. In the **E-mail Subject** field, enter the text that must be displayed in the subject line of the email requests (for example, Support Question from Customer Portal).
14. In the **Selectable "To" Email Addresses** area, click 
.
15. Click 
.The **New Email Address** page is displayed.

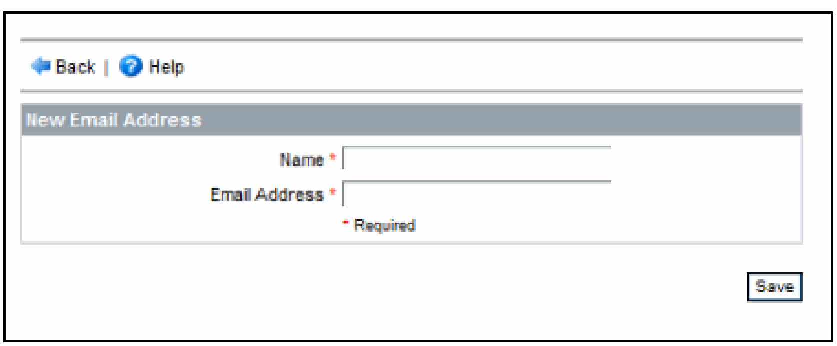


Figure 205 New Email Address Page

You can add a list of Email addresses from which a Portal visitor can select an Email address to which the request must be sent. Thus the request can be sent to the primary Email address specified in the **Email Address** field, and the Email address that the Portal visitor selects in the form.

i. In the **Name** field, enter the name of the person, department, or mailbox to which the Email address belongs. This is a mandatory field.
ii. In the **Email address** field, enter a valid email address. This is a mandatory field.
iii. Click **Save**.

The New Email Address details are saved, and the Email address is displayed on the page. The names that you create here are displayed in the **To Email:** list in the form. on the Portal.

16. Click the **Back** button.
17. Click **Save**.

    The Automatic Ticket Resolution tab is displayed next to the Glossary tab when a visitor logs on to KB Customer Portal.

    In addition, visitors can use the ATR tab to fill a form and submit queries.

Configuring Data Fields for the ATR Tab

In the Data Fields area, you can create, and modify fields that visitors are required to fill before submitting a ticket or question. You can also specify the fields that are mandatory, and set the order in which the fields must be displayed in the form.

By default, the E-mail Address data field is available in the form that is displayed to Portal visitors. The E-mail Address data field is displayed in the Data Fields area, and is marked as Required. You can change this setting, and add more fields.

When a visitor fills the fields and submits a request or question, relevant KB Articles that answer the question are listed, and the visitor is provided with the option of resolving the issue, or continuing with the submission. If the visitor chooses to continue with the submission, the request is sent to the incoming email address(es) specified in the ATR tab configuration.

Creating Data Fields

You can create additional data fields to be displayed in the **ATR** tab.

To Create a Data Field

1. In the **Portal Modules** page, click the **ATR Options** link.

   The **Automatic Ticket Resolution Settings** page is displayed.

2. In the **Data Fields** area, click 
.

   The **Data Field** page is displayed.

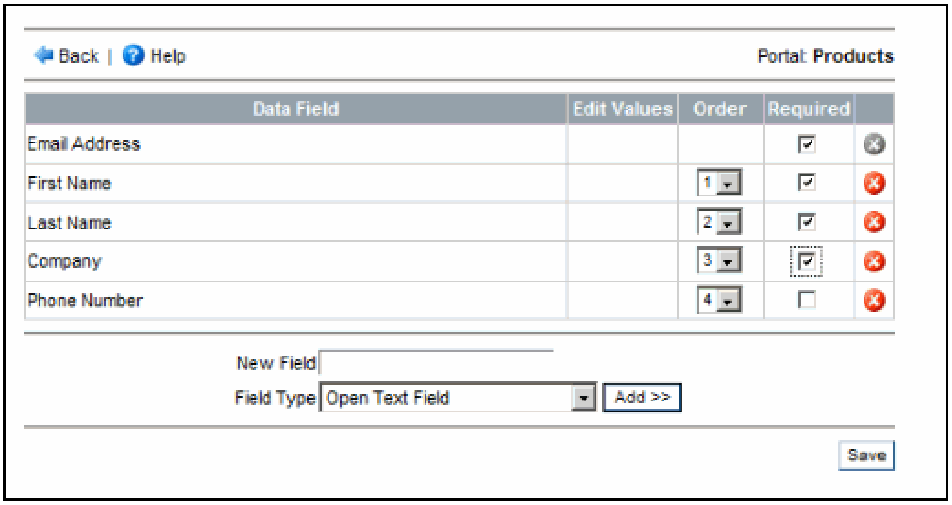


Figure 206 Data Field Page

3. In the **New Field** field, enter a unique name.
4. From the **Field Type** list, select one of the following types:
   - **Open Text Field** - Enables you to create a field whose value can be a combination of letters and digits.
   - **Dropdown Selection** - Enables you to create a list with multiple values from which the visitor can select a value.
5. Click the **Add** button.

   The new field is displayed along with the existing data fields.

Setting Values for Data Fields

You can set values for a Dropdown Selection type of data field. For example, you can create North, South, East, and West as values for the Zone data field, to enable Portal visitors to select the Zone.

To Specify Values for a Dropdown Selection Type of Data Field

1. In the **Portal Modules** page, click the **ATR Options** link.

   The **Automatic Ticket Resolution Settings** page is displayed.

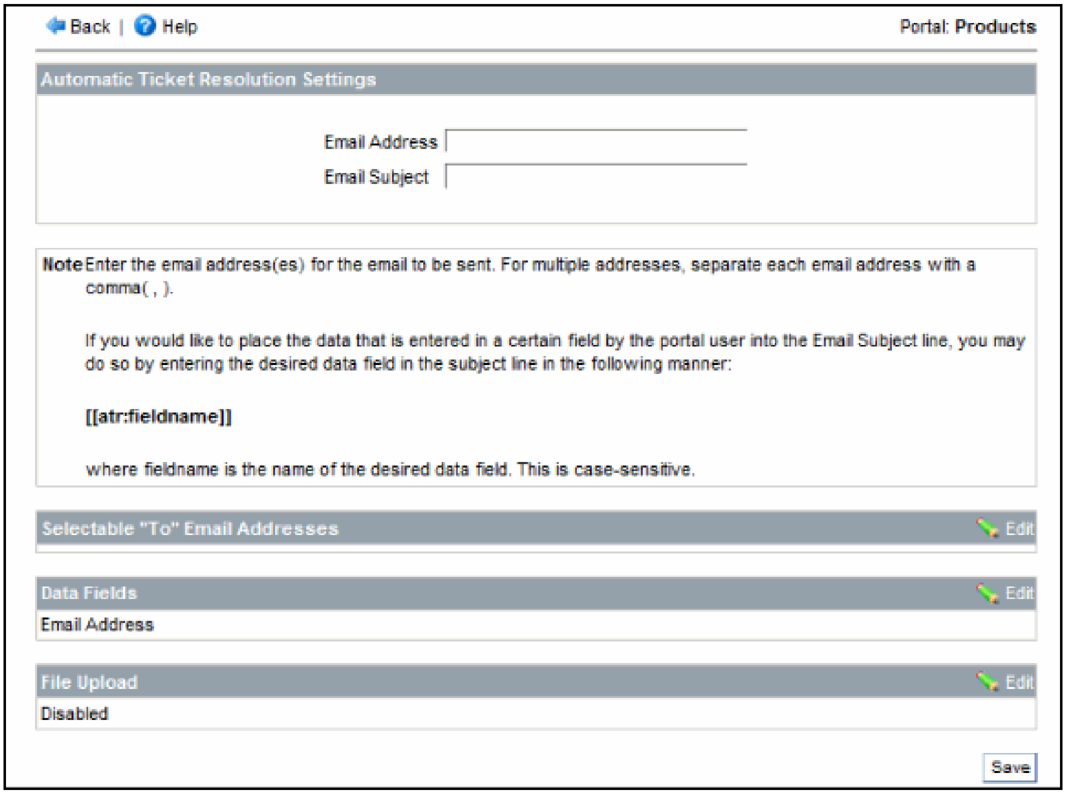


Figure 207 ATR Settings Page

2. In the Data Fields area, click Edit.
   The **Data Field** page is displayed.

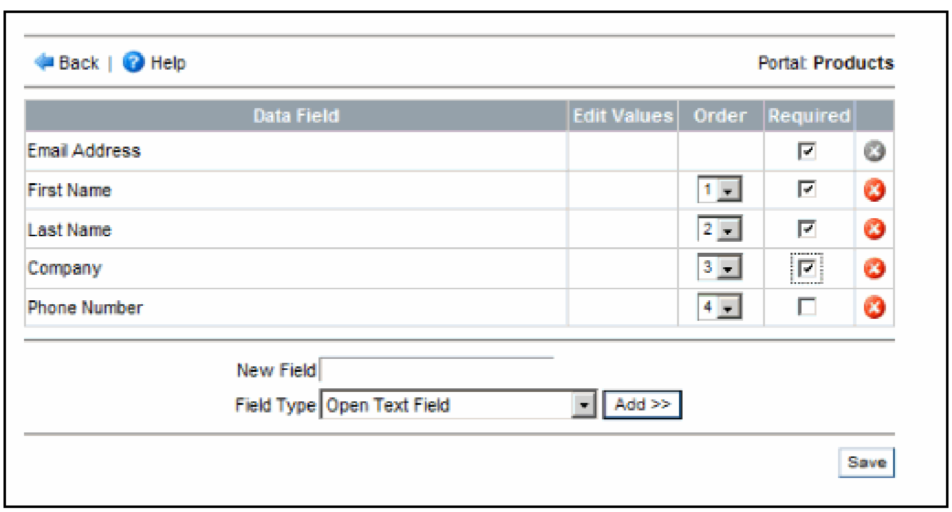


Figure 208 Data Field Page

3. From the **Field Type** list box, select **Dropdown Selection**.
4. In the **Edit Values** column for the required Dropdown Selection type of data field, click .
   The **Data Field Values** page is displayed.

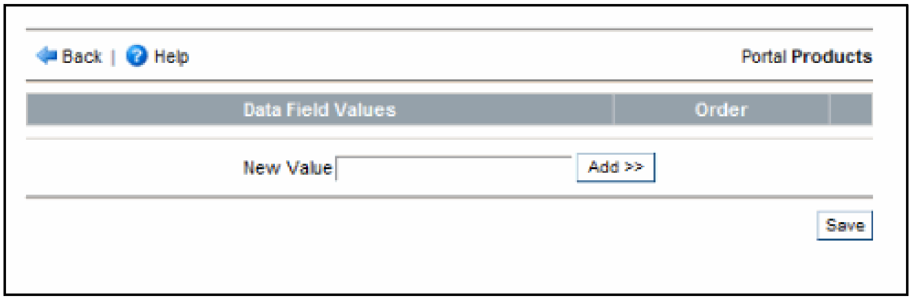


Figure 209 Date Field Values Page

5. In the **New Value** field, enter a value.
6. Click **Add**.

   The new value is displayed in the **Data Field Values** list.

   Repeat Steps 4 and 5 to add all the relevant values to be displayed in the values list for the selected data field.

   Set the Order of Values

7. Using the Order lists, specify an order in which the selection should appear.
8. Click **Save**.
9. Click **OK**.

> **Note**
>
> After setting the values for the Dropdown Selection Type of data field, click **Back** to continue working with other data fields.

Ordering Data Fields

You can change the order in which data fields are displayed in the ATR tab.

To Reorder Data Fields listed in the ATR Tab

1. In the **Portal Modules** page, click the **ATR Options** link.

   The **Automatic Ticket Resolution Settings** page is displayed.

2. In the **Data Fields** area, click 
.

   The **Data Field** page is displayed.

3. Using the Order lists, select a number for every data field.

   The field order is set, and the data fields are listed in the specified order in the **ATR** tab.

Required Data Fields

You can set any of the data fields as **Required**, to ensure that portal users do not submit a form without entering required data.

To Set Data Fields as Required in the ATR Tab

1. In the **Data Fields** area of the **Automatic Ticket Resolution Settings** page, click 
.

The **Data Field** page is displayed.

2. In the **Required** column, click the check box for every data field you want to set as required.

   A Portal user can submit a form only after entering details for all the data fields marked as **Required**.

> **Note:**
>
> You cannot directly modify the value(s) of a data field. To modify the value(s) of a data field, you need to first delete the data field, and then create a new data field with the required value(s).

Deleting Data Fields

You can delete a data field. To do so:

1. In the **Data Fields** area of the **Automatic Ticket Resolution Settings** page, click Edit.

   The **Data Field** page is displayed.

2. Click in the row of the data field you want to delete.
3. You are prompted to confirm the deletion of the data field.
4. Click **Save**.

   The data field is deleted, and is no longer displayed in the ATR tab.

Enabling Portal Visitors to Upload Files

You can enable a Portal user to upload files as attachments. The Portal User can upload a documents.

By default, the File Upload option is disabled. When this option is enabled, the **File** field and the **Browse** button are displayed in the ATR tab to enable visitors to attach files.

To Enable the File Upload Option

1. On the Automatic Ticket Resolution Settings page, click Edit in the File Upload area. The File Upload page is displayed.

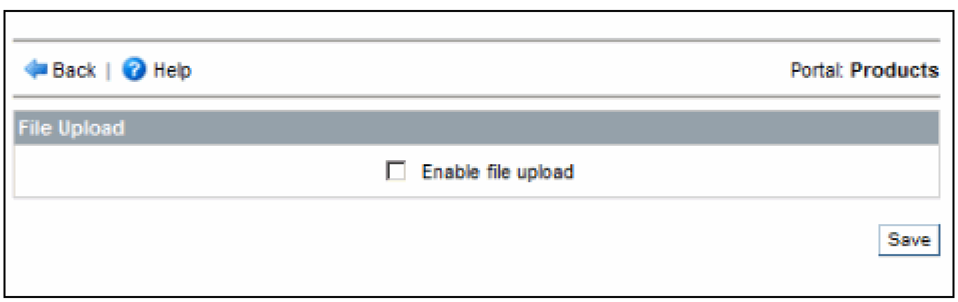


Figure 210 File Upload Page

2. Select the **Enable file upload** option.
3. Click **Save**.

Integrating Knowledge Spaces™ With the Email Channel

Integrating Knowledge Spaces™ with the Email channel of an external application enables you to deploy forms to be used by visitors to Spaces by Moxie™ - Knowledge Spaces™ Customer Portal. You can configure the fields to be displayed on a form, and the email IDs to which a form from a visitor must be submitted. When a visitor fills details and submits a form, relevant KB Articles are retrieved and displayed to the visitor, with an option to continue with the submission of the form. If the visitor is not satisfied with the KB Articles that have been retrieved, the visitor can choose to send the form. The data submitted in the form is encoded in XML, and then included in the body of an E-mail. This E-mail is sent to the address(es) configured for the purpose, using mapping defined between the ATR data fields, which are the fields defined for the form, and the fields in the external application. This mapping must be defined in a configuration file..

> **Note**
>
> Contact Moxie Software™ Support for information about integrating the E-mail channel with Knowledge Spaces™.

Integrating Knowledge Spaces™ With the Chat Channel

You can integrate the Chat channel of an external application with Knowledge Spaces™. The Chat users in the external application can work with KB Articles during Chat sessions with visitors to Spaces by Moxie™ - Knowledge Spaces™ Customer Portal. You can use one of the Optional Tabs displayed on the Portal modules page for Chat channel integration.

> **Note:**
>
> Contact Moxie Software™ Support for information about integrating the Chat channel with Knowledge Spaces™.

Portal Splash Screen

The Portal Splash Screen is a popup browser window that appears when a user accesses a KB Portal. The splash screen can be enabled or disabled by portal and each portal can be configured with a unique splash screen. For example, you can use the splash screen to inform the Users about updates.

> **Note:**
>
> This feature is available for the Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.

To enable the splash screen, select **Splash Screen** in the Portal Modules area, and click **Save**.

Splash Screen Content

To create the content of the splash screen, click to the left of the Splash screen name on the Portal Modules page. You can modify the size of the splash screen browser window and create the content of the splash screen. Use the **Height** and **Width** boxes to set the size of the browser window of the splash screen. In the content area, enter the content that you want to display in the splash screen.

You can use standard HTML commands and code to create the text and content of the splash screen.

You can also add an image from the attachment library to place in the splash screen.

Use the following code: [[image:<attachment ID>]]

Where <attachment ID> is from the attachment library, for example: [[image:100]]

> **Tip:**
>
> An easier way to add images or other files to appear in the splash screen is to use the Web File Manager. You can upload any file into the Web File Manager and use the file location (URL in Web File Manager) and HTML commands to reference the file in the splash screen. For more information about uploading files into the Web File Manager see **“Manager” on page 113**.

Click **Save**.

Forum

Forum is a discussion tool that provides an open and searchable repository of shared Knowledge, and experience.Forums consist of Categories, Forums, and Topics.The **Forum** option on the Portal Modules page provides the ability to enable or disable the Forum feature for the Portal.

> **Note**
>
> - Forum is a licensed feature, and can be purchased from Moxie Software™ as a separate module.
> - The functionality of Forums has been changed for the Portals created using **Portal Style #4**. However the Forum functionality has not changed for Portals designed using Portal #1, Portal #2, or Portal #3.
> - For information about Forums in Portals designed using **Portal Style #1**, **Portal Style #2**, or **Portal style #3**, see **“Forum Feature in Portals Designed Using Portal Style #1, #2, or #3” on page 247**.
> - For information about Forums in Portals designed using **Portal Style #4**, see **“Forum Feature in Portals Designed Using Portal Style #4” on page 251**.

Forum Feature in Portals Designed Using Portal Style #1, #2, or #3

With appropriate rights, Internal Users have the ability to create new Categories, and Forums for use in a Portal.

Using the **Forum** tab on the KB Portal, External Users can search, read, and post within the Forum area, contributing to and benefiting from the Forum experience. Forums are Portal specific and are created, configured, and maintained in **Forum Options** on the Portal Modules page within the Portal tab.

Forums can be organized at a high level into categories. Categories are completely within your control. Categories might mirror products, marketing channels, or technical disciplines.

Some of the examples for categories are:

- Active Server Pages (ASP)
- Hyper Text Markup Language (HTML)
- SQL (Structured Query Language)

Categories are file cabinets where in you want to group related topics. In the example above, various Forums might exist for ASP. A Forum generally represents a single discussion thread within the topic.

Creating a New Forum

You can create new Forums for the External Users to use during the discussions.

1. Select the **Portal** tab. The existing Portals are displayed.
2. Click the required Portal name link.
3. In the **Portal Modules** area, click **Configure**.

   The existing Portal Modules are displayed.
4. Select the **Forum Options** link. The **Forum Categories** page is displayed.

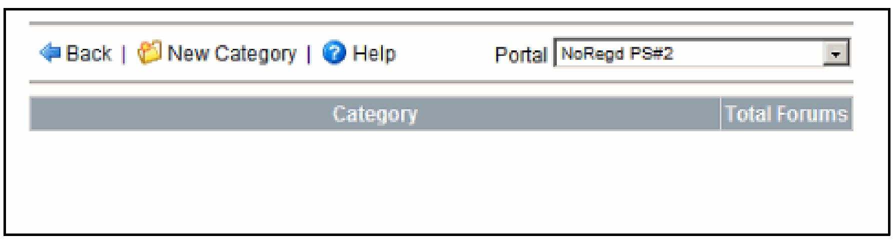


Figure 211 Categories Page

5. Click New Category. The **New Category** page is displayed.

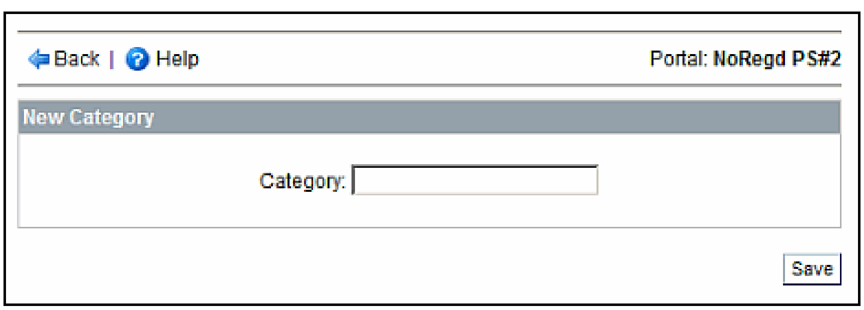


Figure 212 New Category Page

6. Type a category name in the **Category** field.
7. Click **Save**.
8. Click on the category name link. The **Forum** page is displayed.

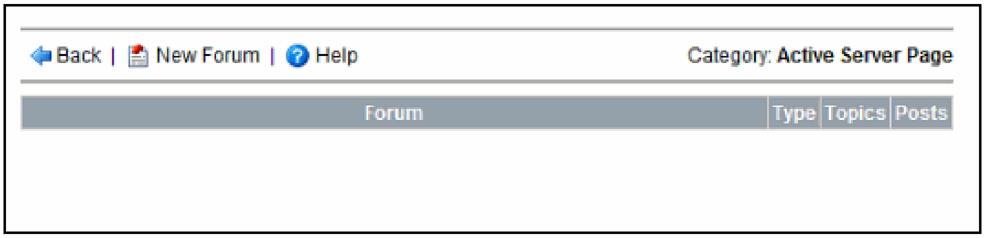


Figure 213 Forum Page

9. Click New Forum .The **New Forum** page is displayed.

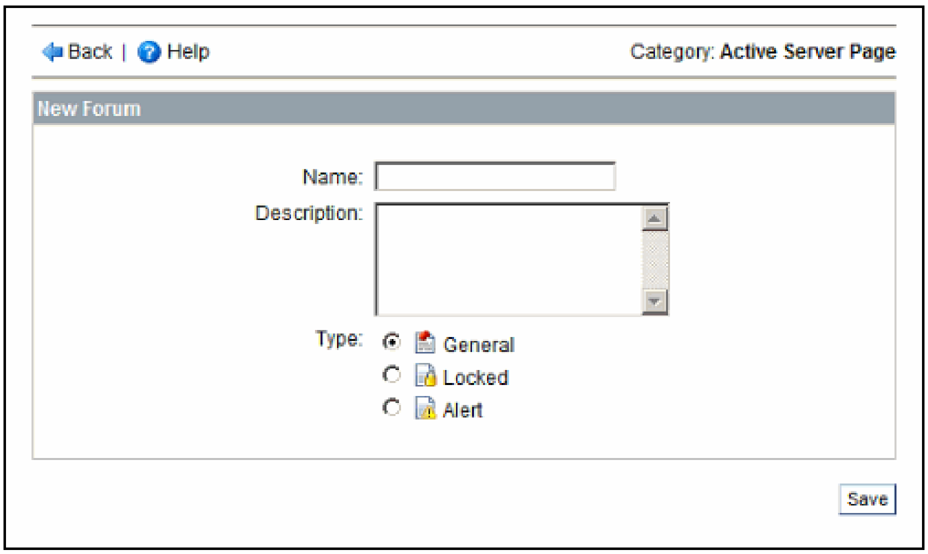


Figure 214 New Forum Page

10. Type the name for the forum in the **Name** field.
11. Type the description for the forum in the **Description** field.
12. Designate the **Type** of Forum, either **General**, **Locked**, or **Alert**.
13. Click **Save**.

> **Note:**
>
> On the **Portal Modules** page for a Portal, select the **Forum** checkbox and click **Save**.

Using Forums

Searching and reading forums are accomplished through the Portal interface on the **Forum** tab.

The External users have the ability to browse Forum topics, or use the search feature which will return all relevant posts.

By selecting a post, users receive the original post and all subsequent replies in chronological order.

Contributing to Forums

Contribution to Forums requires External users to be registered in the Knowledgebase system. Registration is already in place for users of Secure or Personalized Portals. For No Registration Portals, however, users must provide minimal information before being routed to the posting area.

> **Note:**
>
> - The Knowledgebase application does not provide mechanisms for authenticating External users in a non-registered Portal. To ensure External users are authorized and that Forums and Posts are traceable to their origins, Secure Portals are recommended.
> - After an External user has signed in or registered, the user should follow these steps to contribute to the Forum.

Creating a New Topic

1. On the KB Portal, select the **Forum** tab.
2. Browse to or search for a Forum.
3. Click on the **Topic Name** link. **The New Topic** page displayed,
4. click 

. The **Forum Login** page is displayed.

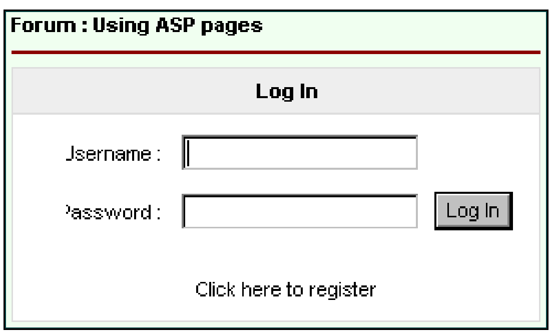


Figure 215 Forum Login Page

5. Enter the Username, Password and click **Login**. The **Forum New Topic** page is displayed.

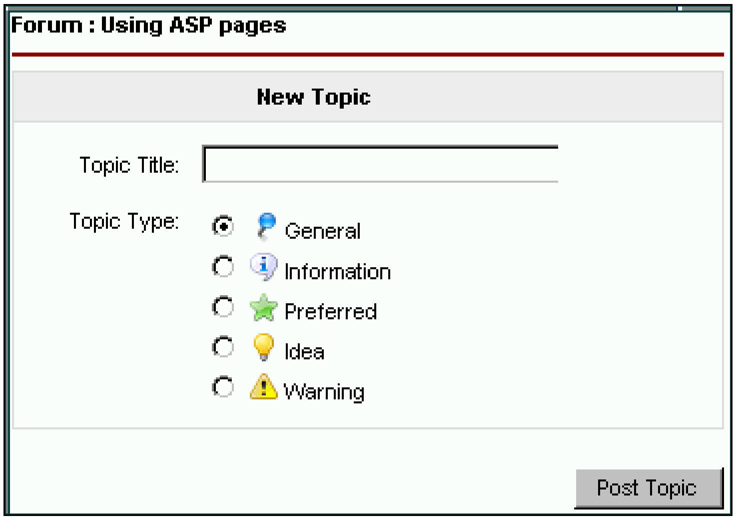


Figure 216 Forum New Topic Page

6. Type a topic name in the **Topic Title** field.
7. Select the type that best describes the Topic. Choices are:
   - **General**
   - **Information**
   - **Preferred**
   - **Idea**
   - **Warning**
8. Click **Post Topic**.

Contribute to an Existing Topic

1. On the KB Portal, select the **Forum** tab.
2. Browse to or search for a Forum.
3. Select an existing Topic.

- Select **New Post** to add comments to the topic.
- Select **Reply** to post a comment to a specific existing post.
- Select **Quote** to post a comment to a specific existing post that includes the content from the original post.

> **Note:**
>
> An External User can delete posts from the Forums only if the necessary permission is given for the User in the KB Administrator.

Forum Feature in Portals Designed Using Portal Style #4

Forum in Moxie Software Customer Portal is a discussion tool that provides an open and searchable repository of shared Knowledge, and experience. The objective of Forums is to provide an area where users can interact with questions, answers, and discussions on a given topic.

A Forum consists of a tree like directory structure containing at the lowest end threads, and inside them posts. Forums are updated by a group known as contributors, and moderated by a group known as moderators. Forums consist of Forum Categories, Forum Threads, and Posts. The Portal users with appropriate rights have the ability to manage, and contribute to the Forums on the Portal

Using the Forum tab on the Portal, Portal Users can search for Forums, view, create and edit Forum Posts on the Portal.

Note:

An External User with the **Manage Forums** permission can manage the Forums on the Portal.

For more information about Forums in Portals designed using Portal Style #4, see **Spaces by Moxie™ - Knowledge Spaces™ 9.4Customer Portal Guide.**

The **Forum** option on the Portal Modules page provides the ability to enable or disable the Forum feature for the Portal. Select the **Forum** option, and click the **Forum Options** link to enable Community login request for the Portal, and define the fields for the information you want from the Community user, when the user requests access to the Portal to manage community content, Wikis and Forums.

Wikis

The Wiki feature in Knowledge Spaces™ provides an ability to articulate about a topic for the Community users on the Portal. The Community Users with necessary permissions can create, edit and manage Wiki content without logging on to Knowledge Spaces™ Admin Control Panel, or without an Internal User's account. The Wikis on the Portal are more like Articles, but do not require Workflows. The Community Users with necessary permissions can search for the Wikis available on the Portal, configure the Wiki templates that must be available for the Portal, configure the Wiki visibility properties for the Portal, suspend or restore users from posting Wiki Articles on the Portal, configure a Wiki Tag Cloud for the Portal, lock, unlock, or delete Wikis on the Portal.

Note

- Wiki is a licensed feature, and can be purchased from Moxie Software™ separately as an add-on module.
- The Wiki feature is not available for Portals that have been designed using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
- For more information about Wikis in Portals designed using Portal Style #4, see **Moxie Software™ Knowledge Spaces 9.4Customer Portal User's Guide**.

The **Wiki** option on the Portal Modules page provides the ability to enable or disable the Wiki feature for the Portal. Select the **Wiki** option, and click the **Wiki Options** link to enable Community login request for the Portal, and define the fields for the information you want from the Community user, when the user requests access to the Portal to manage community content, Wikis and Forums.

> **Note:**
>
> Click next to the **Wiki** option to specify a new name for the Wiki tab on the Portal.

Enabling Community Login Request for the Portal

1. In the **Portal Modules** page, click the **Wiki Options** or the **Forum Options** link. The following page is displayed.

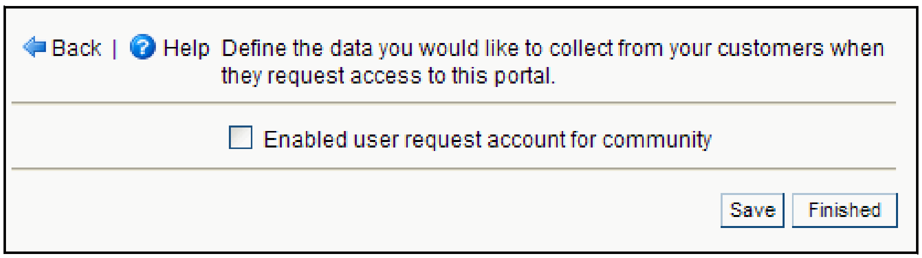


Figure 217 Enabling Community Login Request

2. In the **Request Email Address** field, enter the email address to which the Community Login request must be submitted.
3. Select the **Enabled user request account for community** option. The **Data Field** area is displayed on the page.

   In the **Data Fields** area, you can create, and modify fields that the Community Users are required to fill before submitting the Login request. You can also specify the fields that are mandatory, and set the order in which the fields must be displayed in the form.

   By default, the **E-mail Address**, **First Name**, and **Last Name** data fields are available in the form that is displayed to Community users. The default data fields are marked as **Required** and cannot be deleted. You can add more fields to the page and set the order in which the fields must be displayed.

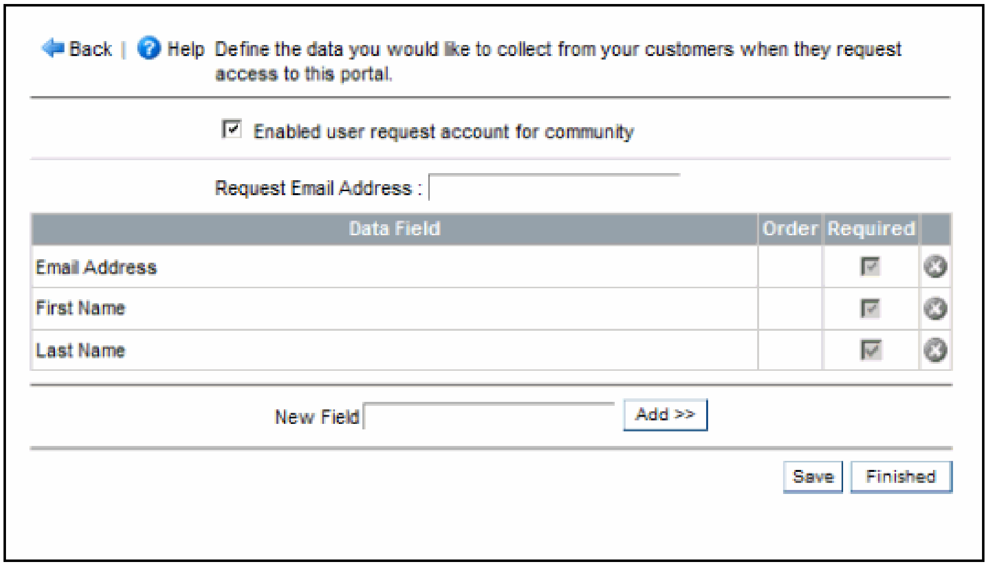


Figure 218 Configuring the Data Fields for Community Login Request Form

To add New Fields

4. In the **New Field** field, specify a unique name for the field.
5. Click the **Add**. The new field is displayed along with the existing data fields.
6. Repeat Steps **4** and **5** to add all the fields you want to configure for the Login request form.
7. Using the **Order** lists, select a number for every data field. The field order is set, and the data fields are listed in the specified order on the Login request form.

> **Note:**
>
> You can click in the row of the Data field you want to delete. You are prompted to confirm the deletion of the data field.

8. Click **Save**.

RSS

Real Simple Syndication, commonly known as RSS, is a family of web feed formats used to publish frequently updated works in a standardized format. An RSS document which is called a "feed" or "web feed" includes full or summarized text, and metadata such as publishing date and, authorship. RSS Feeds benefit publishers by letting them syndicate content automatically. They benefit Portal Users who want to subscribe to timely updates from preferred Web Sites.

There will be a new website for RSS Feeds. When a Portal User subscribe for RSS Feeds, a new website opens. This is to avoid the load on the Customer Portal by Portal Users who are subscribing for RSS or updates

The RSS option on the Portal Modules page provides the ability to enable or disable the RSS feature for the Portal.

Note

- RSS is a licensed feature, and can be purchased from Moxie Software™ separately as an add-on module.
- The RSS feature is not available for Portals created using **Portal Style #1**, **Portal Style #2**, or **Portal Style #3**.
- For more information about RSS in Portals designed using Portal Style #4, see **Spaces by Moxie™ Knowledge Space**s **9.4Customer Portal Guide**.

Settings

The Settings option enables External users to reset their password. When this option is configured in Knowledge Spaces™ Admin Control Panel, External users can reset their passwords when they log on to secure and personalized Portals, and Portal Snap-Ins.

Custom Tab Settings

You can add seven custom tabs to the KB Portal. These tabs are completely customizable. You can change the name of the tab and create any type of content for these sections that you want your users to see.

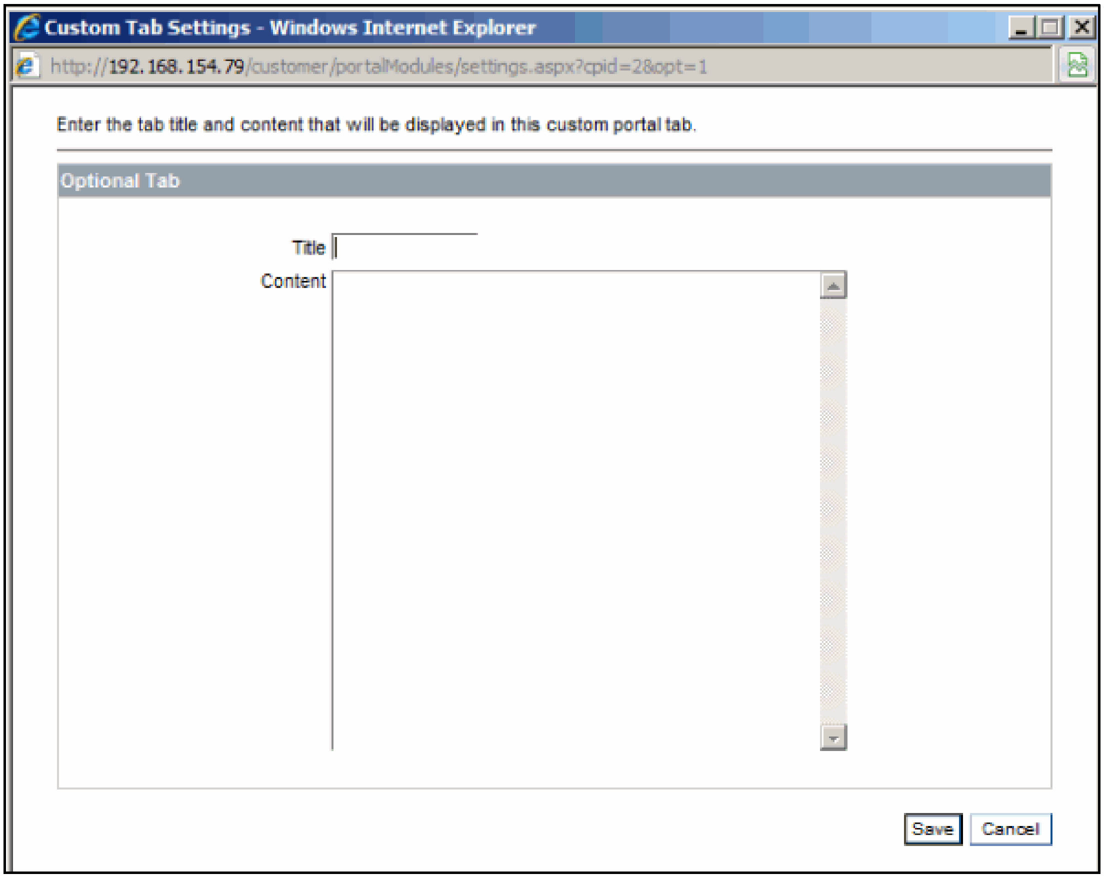


Figure 219 Custom Tab Settings Page

To Create Custom Tabs

1. In the **Title** field, type the name of the custom tab. This name appears on the tab in the KB Portal.
2. In the **Content** field, type the **content** of the tab.

> **Note**
>
> - You can use regular text or HTML commands to generate the content. You can embed images by referencing your image or file name from the Web File Manager.
> - When your users click on the custom tab in the Portal, the content you added to the area is displayed.
> - You may also use HTML <iframe> or <meta> tags to embed other web pages of site.

3. Click **Save**. The title and content are saved.

Portal Customization

You use the Portal Customization area to create the look and feel of your Portal to match your web site or your company's branding requirements. The portal can be customized to match any HTML page or content.

From the Portal Customization area, you can create the Portal color scheme, embed your logo and images into the Portal, create Portal text, and HTML tags.

You can also set configurations for the Portal display, such as language options, Article information, and Portal style.

> **Note:**
>
> For more complete and flexible Portal customization options, be sure to also evaluate the customization possibilities that are available by using the Portal Snap-Ins, available in the Portal tab in KB Administrator.

Figure 220 Portal Home Page

You can customize your Portal by clicking **Configure** in the Portal Customization section of the Portal Home page.

Figure 221 Portal Customization Page for Portals Designed Using Portal Styles #1, #2, #3

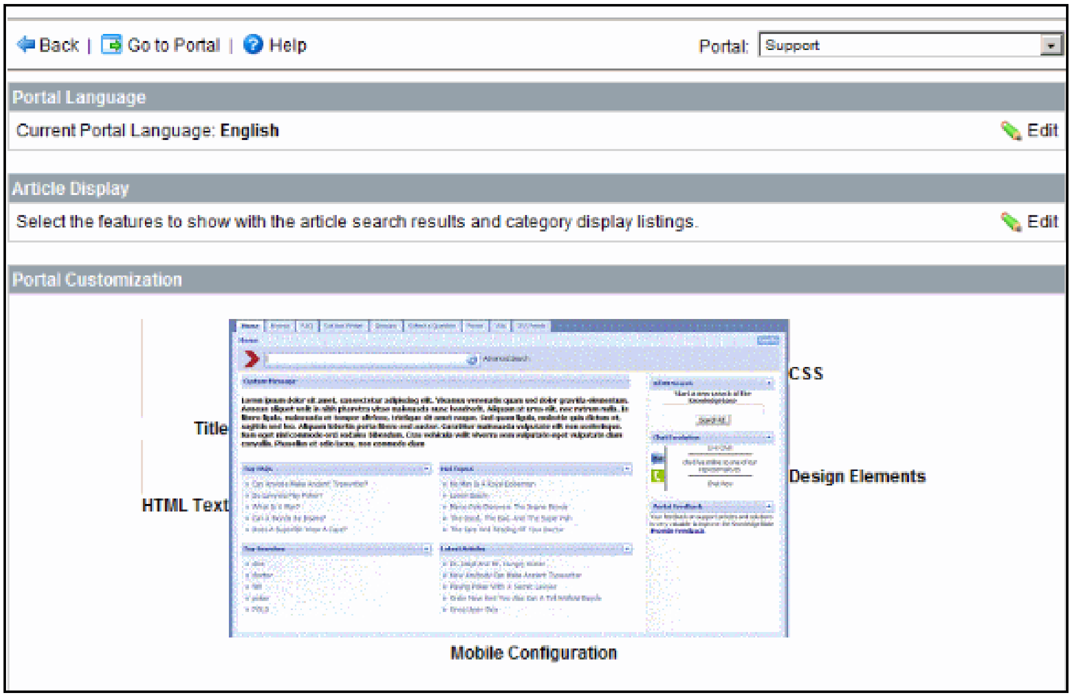


Figure 222 Portal Customization Page for Portals Designed Using Portal #4

Portal Homepage Layout

You can configure the display of following Modules on the Homepage of a Portal:

- Hot Topics
- Latest Article
- Top 10 FAQ
- Custom Message

Note:

The **Portal Homepage Layout** section is available only for Portals created using Portal #1, Portal#2, or Portal #3.

The Portal Home page also provides options to configure the number of Articles to be listed in the **Hot Topics**, and **Latest Articles** areas on the Portal. It also includes options to configure the date range for the Articles to be listed in the **Hot Topics** area and the **Latest Articles** area on the Portal. For example, you can configure that only the Articles maximum viewed by the Portal users for the last 20 days must be listed in the **Hot Topics** area on the Portal Home page

Note

By default, 10 Articles are listed in the **Hot Topics**, and **Latest Articles** areas on the Portal.

To configure the Filters for Hot Topics and Latest Articles on a Portal, carry out the following steps:

1. In the Portal Customization page of a Portal, click **Edit** within the **Portal Homepage layout** area. The **Homepage Layout** page is displayed.

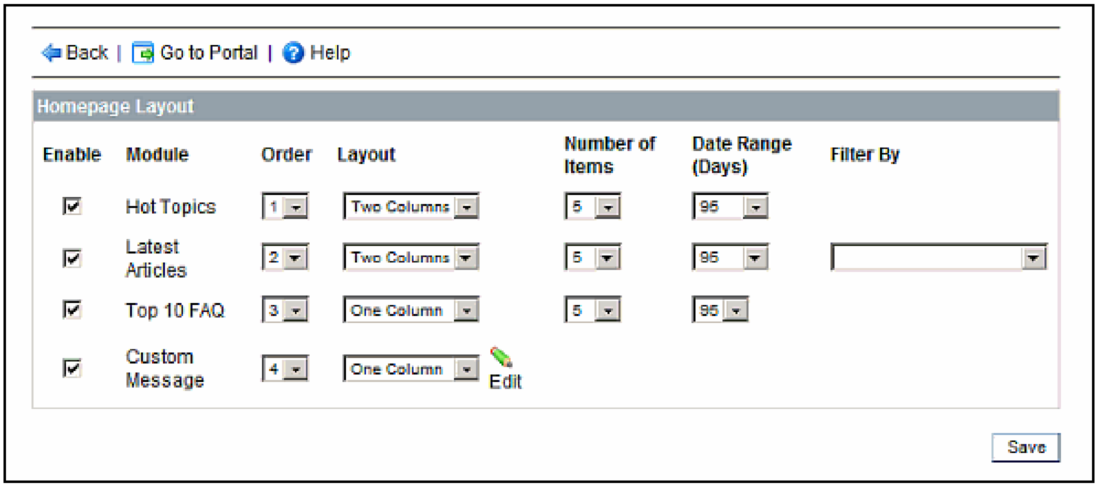


Figure 223 Portal Home Page Layout Page

2. From the lists displayed in the **Number of Items** column, select the numbers for the maximum number of Articles that must be listed in the **Hot Topics** area, and the maximum number of Articles that must be listed in the **Latest Articles** area on the Portal.
3. From the lists displayed in the **Date Range (Days)** column, select the date range for the Articles that must be listed in the **Hot Topics** area, and the date range for the Articles that must be listed in the **Latest Articles** area. For example, you can select the Date Range as **20** for Hot Topics to list the Articles maximum viewed by the Portal users in the last 20 days in the **Hot Topics** area on the Portal.
4. Click **Save** to save the configuration.

Portal Language

You can display the Portal text (search options, tabs, etc.) in a variety of languages. Click **Edit** to change the language display. You can choose from:

- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- English
- French
- German
- Italian
- Japanese
- Korean
- Optional Language 1
- Optional Language 2
- Polish
- Portuguese

- Russian
- Spanish
- Swedish
- Turkish

Select the radio button for each language you want, and click **Save**.

> **Note**
>
> - The list of languages displayed for selection depends on the KB license you have purchased.
> - You can use the **Optional Language 1** or **Optional Language 2** option to customize your Portal in a different language other than the language listed on the Portal Language customization page.
>
>   For example, you can use the **Optional Language 1** option to customize your Portal to be available in the **French Canadian** language. To do so:
>   i. Create a Portal by selecting the **Optional Language 1** language option.
>   ii. Open the **opt1.xml** file located in the **<SystemDrive>:\Program Files\KnowledgeBase.Net\Knowledgebase\applicationprogram\ini\languages** path on the computer where you have installed Knowledge Spaces™.
>   iii. Replace the English strings with the corresponding translated strings in the French Canadian language.
>   iv. **Save** and close the file.

Article Display

When a Portal user performs a search, the list of Articles matching the search query are displayed. You can configure the Article display to show the following Article characteristics:

- Article Number
- Knowledge Base
- Modified Date
- Rank/Relevance
- Article Size
- Article File Type
- Attributes – Click the **Edit** link to change the name of the Attributes description text, for example Document type.
- Status Alert –Click the **Edit** link to edit the status properties – See description below for Status Alert information
- Enable Expand/Collapse for Embedded Articles – Click **Enable Expand/Collapse for Embedded Article** to select. The **Enable Expand/Collapse for Embedded Articles** feature enables Expand and

Collapse feature for Embedded Articles' hierarchical tree on the Portal. When a Portal User views the Embedded Articles can expand and collapse the Embedded Articles' hierarchical tree.

> **Note**
>
> The **Rank/Relevance** characteristic is available only for Portals created using Portal #1, Portal#2, or Portal #3.

Select the check boxes next to the individual features to enable or disable these features.

Status Alert

You can indicate in the Portal, Articles that are recently created or recently updated. The Article indicators are displayed next to the Articles in the search result listing as new or updated.

To enable the **Status Alert**, click the check box next to Status Alert in the Display section and click **Save**.

To configure the settings, click the **Edit** link next to **Status alert**. The **Status Alert Options** window is displayed.

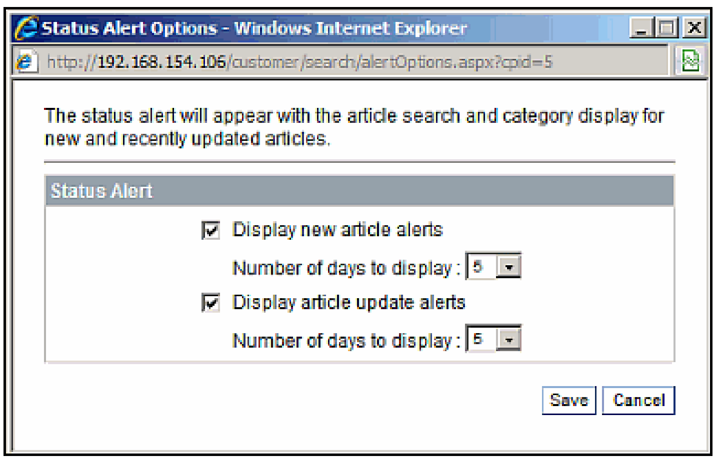


Figure 224 Status Alert Options Window

Use the check boxes to turn on or off the status alert for both new Articles and updated Articles. You can use the list boxes to select the day value for how long the new or updated status should appear with the article after it is created or edited.

Article Information Features

If you want to remove the right frame that displays the article information in the Portal, select **Disabled** from the menu to the left of the Article Information heading. If you want to make the article information frame available when viewing the articles but not show it by default, users must click a button to expand and load the frame, make sure the window is set to Enabled, and check the box to minimize the article information when the article loads. **This feature is available only with portal style #2**.

The individual Article information features that you can enable or disable are:

- Print Article
- E-mail Article
- Bookmark Article

- Download Article
- Article Subscription
- External Notes
- Edit Article
- Rate Article #1 (1-5)
- Rate Article #2 (Did this solve your problem?)
- Article Suggestion
- Suggestion Notification E-mail
- Article Categorization
- Copy Article Link
- Social Media

By default, most of the Article features are made available for all your Portals. To turn off the display for any of the features, clear the selection of the check box next the features that you want to remove, and click **Save**. Use **Edit Content** and **Settings** to configure the template and recipients of the suggestion notification email.

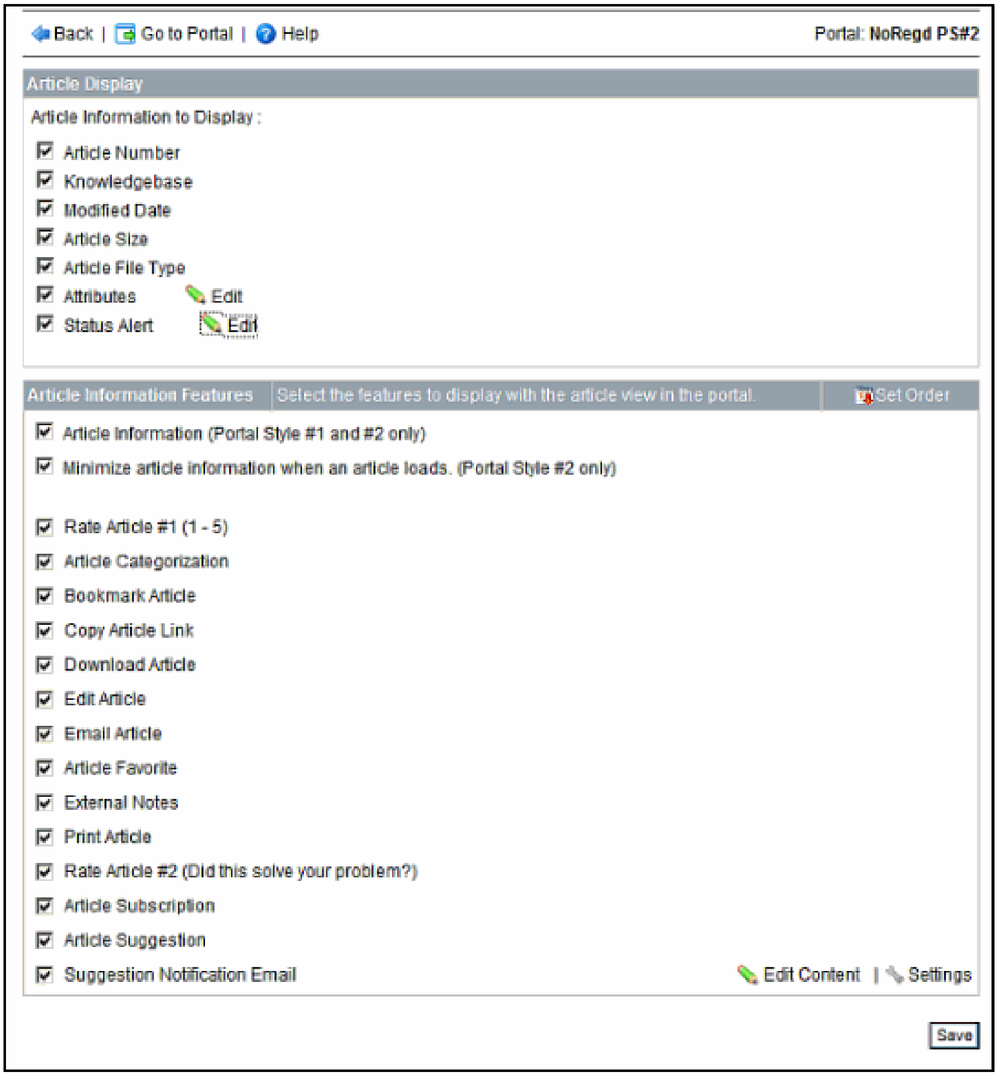


Figure 225 Article Display Page For Portals Designed Using Portal Styles #1, #2, #3

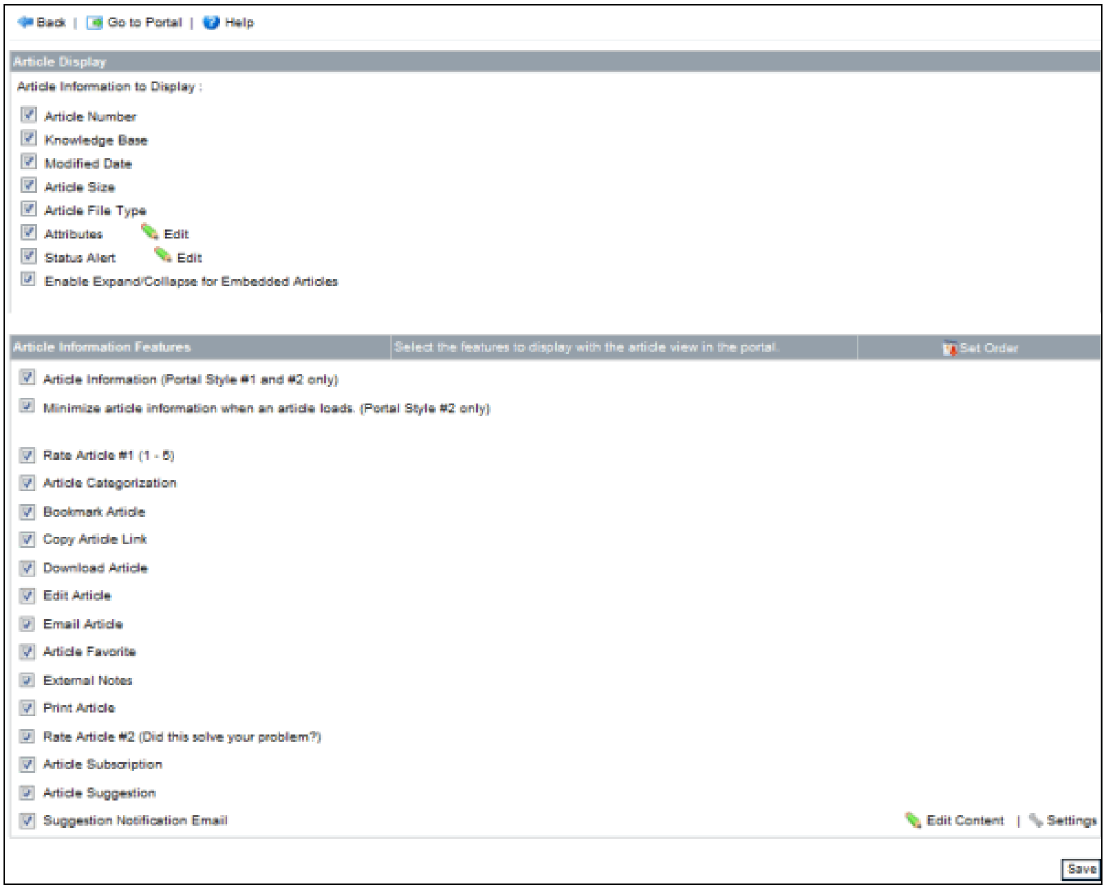


Figure 226 Article Display Page For Portals Designed Using Portal Styles #4

Suggestion Notification – Email Recipients

If you have enabled the **Suggestion Notification Email** in the **Article Information Features** section of the Portal customization settings, you can select email recipients to receive an email notification each time a Portal user submits feedback or suggestions for a certain Article.

To Specify the E-mail Addresses

1. Click  on the Article Information page. The **Email Settings** page is displayed.

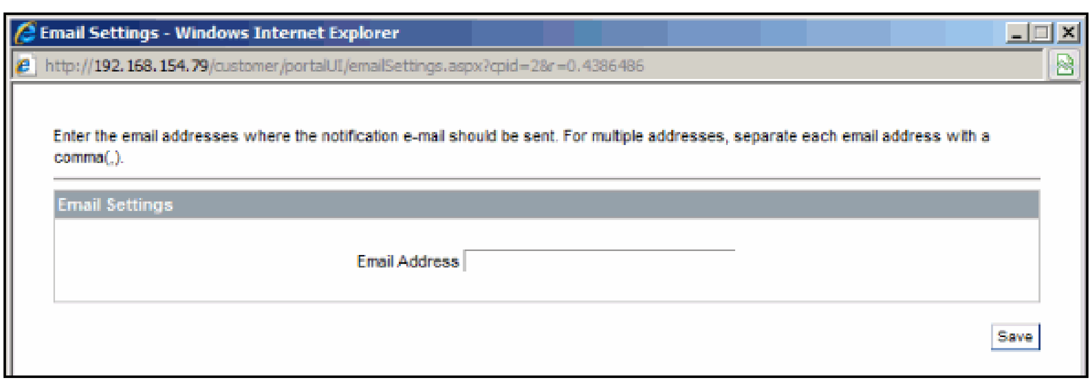


Figure 227 Email Settings Window

2. Enter the E-mail addresses in the **Email Address** field.

> **Note:**
>
> Separate each email address with a comma.

3. Click **Save**.

Article Suggestion Notification – Create/Edit Template

Article Suggestion Notification is the feedback Email sent by a Portal User. Each time when a Portal logs into the Portal, views an Article can send a feedback.

You can configure the Email message using this option

To Enter the Content of the E-mail message

1. Click Edit Content on the Article Information page. The **Suggestion Email Edit** Window is displayed.

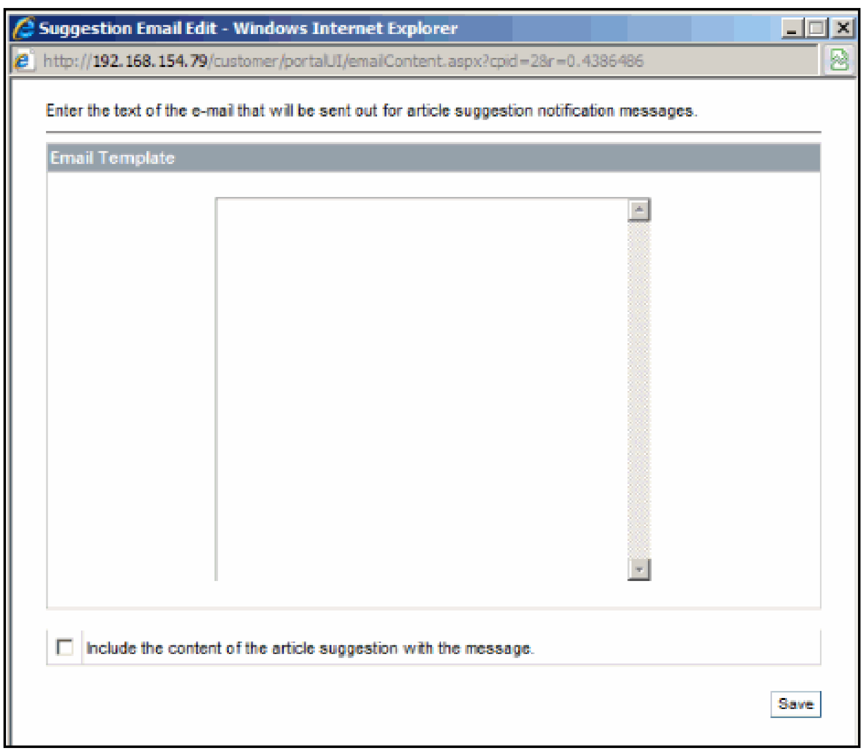


Figure 228 Suggestion Email Edit Window

2. Type the text of the email message as you want it to appear when the recipients receive the email message.

> **Note**
>
> If you want to include the content of the user suggestion, as well as the standard template text, select the **Include the content of the article suggestion with the message** check box.

3. Click **Save**.

Marking an Article as Favorite

The **Article Favorite** option in the Article Information page for a Portal enables you to configure the display of the **Add to Favorite** link in the **Article Information** area on the Portal Article Display page.

The Portal User when views an Article on a Portal can mark that Article as favorite and add that Article to Add to Favorite link on the Portal Article Display page.

The Article is listed in the **Top Favorites** area on the Portal Search Home page and in the **My Favorites** area on the Personalization page of the logged on user.

> **Note:**
>
> When an Article is marked as a favorite, the Article is displayed in the **Top Favorites** area only if it ranks as a top favorite across all the users on the Portal. For example, if there are five Articles that are top favorites of 50 users, 49 users, 48 users, 47 users, and 46 users respectively, when a user adds a new Article as a favorite, that Article will not be listed in the **Top Favorites** area until it outranks the top five Articles.

> **Note:**
>
> The **Article Favorite** option is available only for Portals created using Portal Style #1, Portal Style #2, or Portal #3.

After the Portal user marks an Article as a favorite, the **Add to Favorites** link is changed to the **Delete Favorite** link for the Article. The user can click the **Delete Favorite** link to remove the Article from the favorites list.

The following figure shows the **Add to Favorite** link on the **Article Display** page of a Portal:

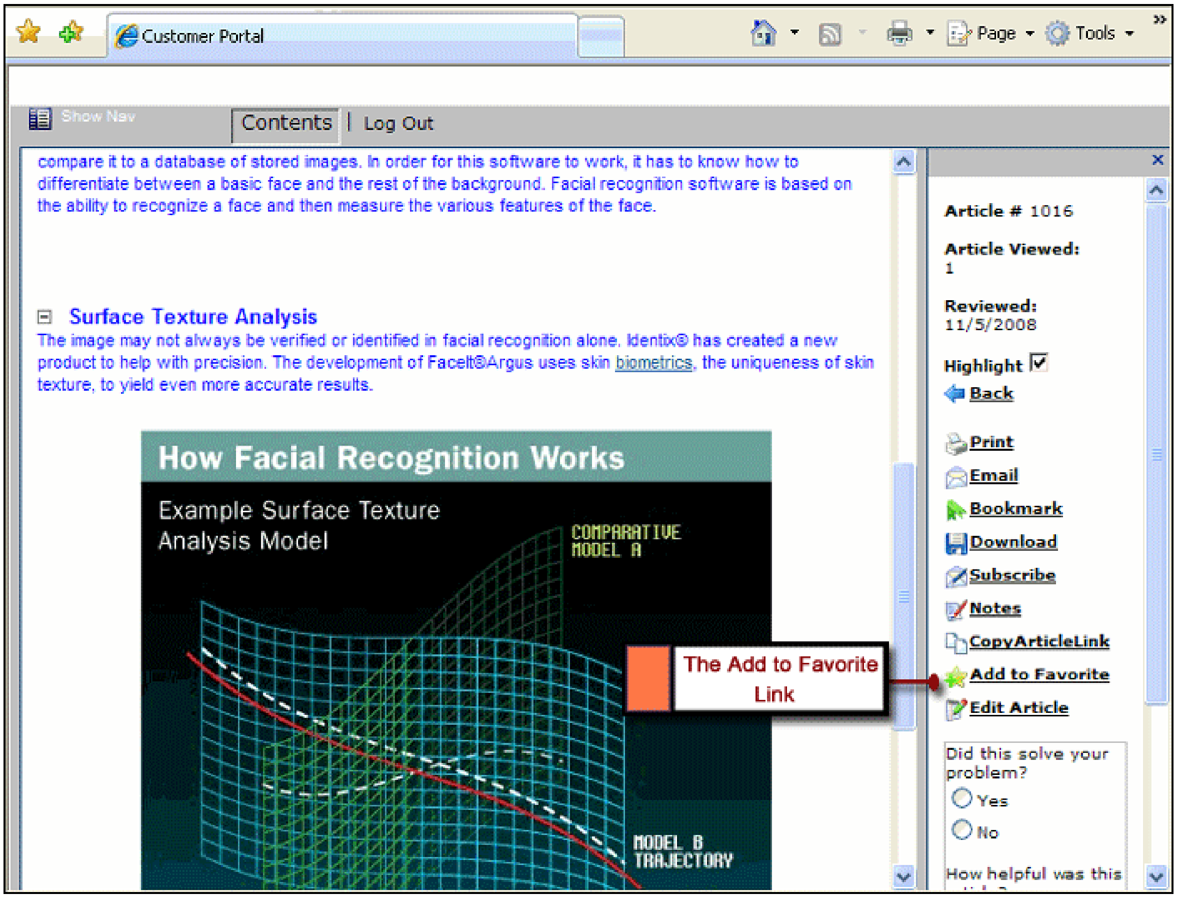


Figure 229 Portal Article Display Page Showing the Add to Favorite Link

The following figure shows the **Delete Favorite** link on the **Article Display** page of a Portal:

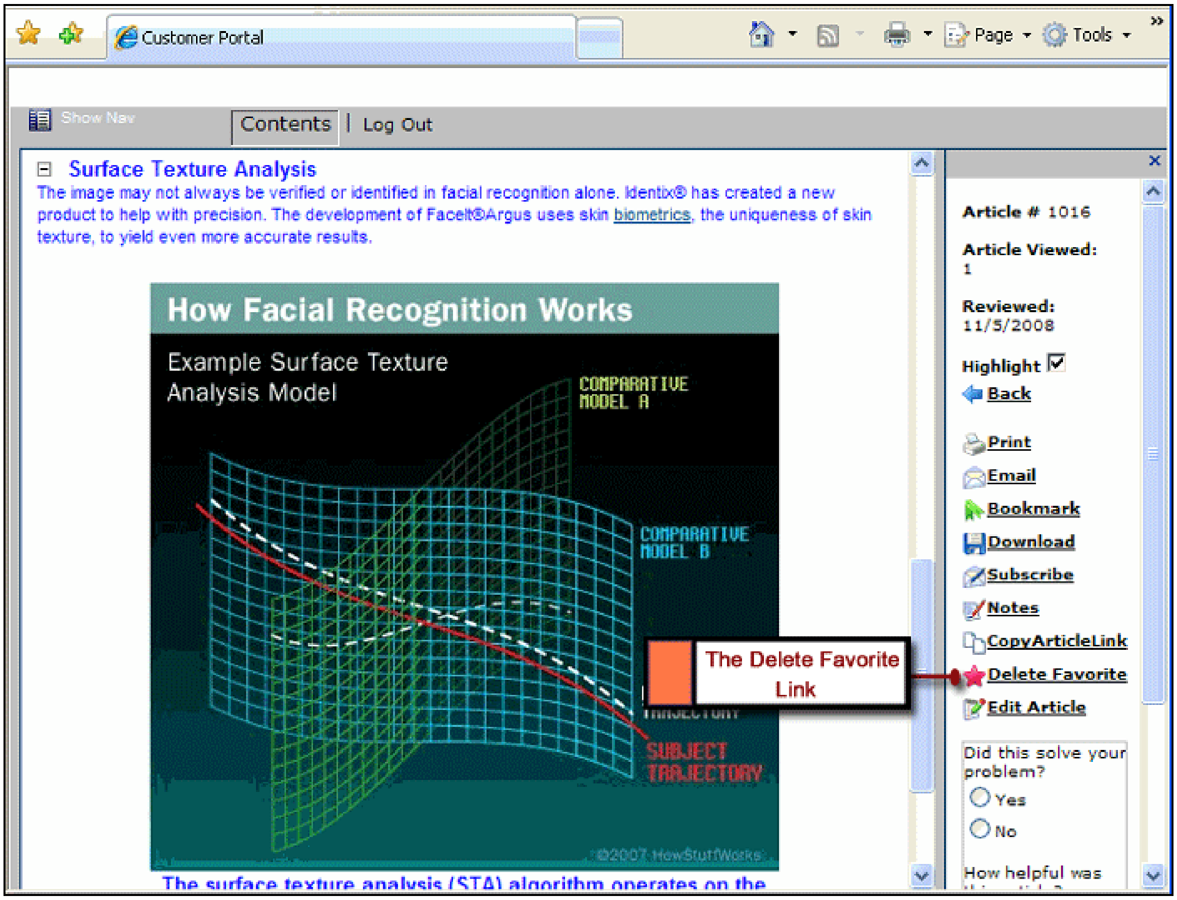


Figure 230 Portal Article Display Page Showing the Delete Favorite Link

Article Viewed Information Available on the Portal

The Article Information area on the Article Display page of a Portal includes the information about the number of times the displayed Article was viewed by users on the Portal.

The following figure shows the Article Viewed information for an Article on the Portal:

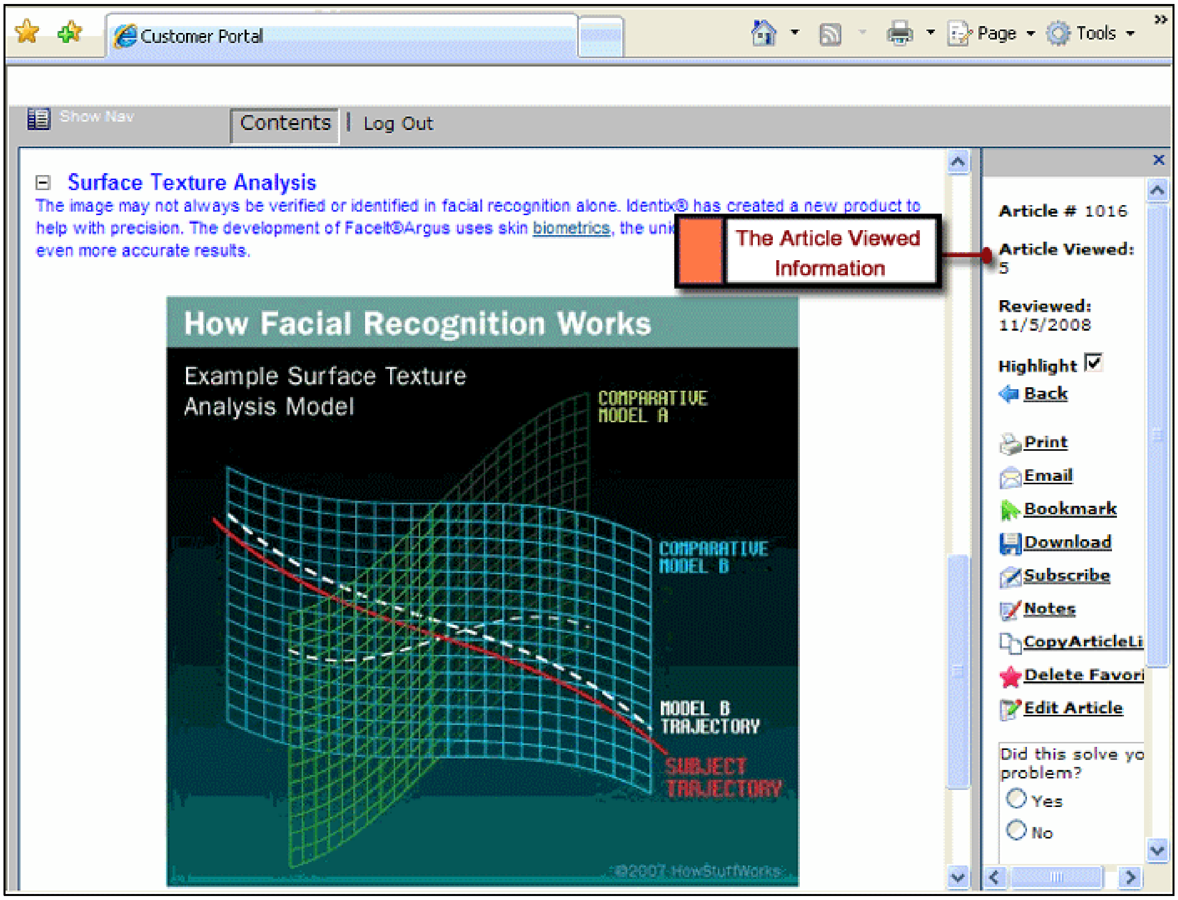


Figure 231 Article Viewed Information Displayed on the Article Display Page

Configuring a Notification Message for 3rd Party Document View on Portal

The **Third party document view notification (ext :Microsoft Office,....)** option on the Portal Article Display page enables you to configure the text to be displayed in the Article Display page on the Portal when a Portal User tries to view a binary document that was imported as an Article into Moxie Software™ Knowledgebase.

Messaging for 3rd party documents can be handled in three ways:

1. No message is displayed to users when a 3rd party document is selected for viewing. This is the default state of the feature; it is not enabled by default in the Portal Article Display. page.
2. A default message is displayed to users when a 3rd party document is selected for viewing. The default message is enabled when the feature is enabled in the Portal Article Display page.
3. A custom message can be created to display to users when a 3rd party document is selected for viewing. Details for creating the custom message are included below.
   i. Click the **Edit Content** option next to the **Third party document view notification (ext :Microsoft Office,....)** option on the Portal Article Display page. The following page is displayed:

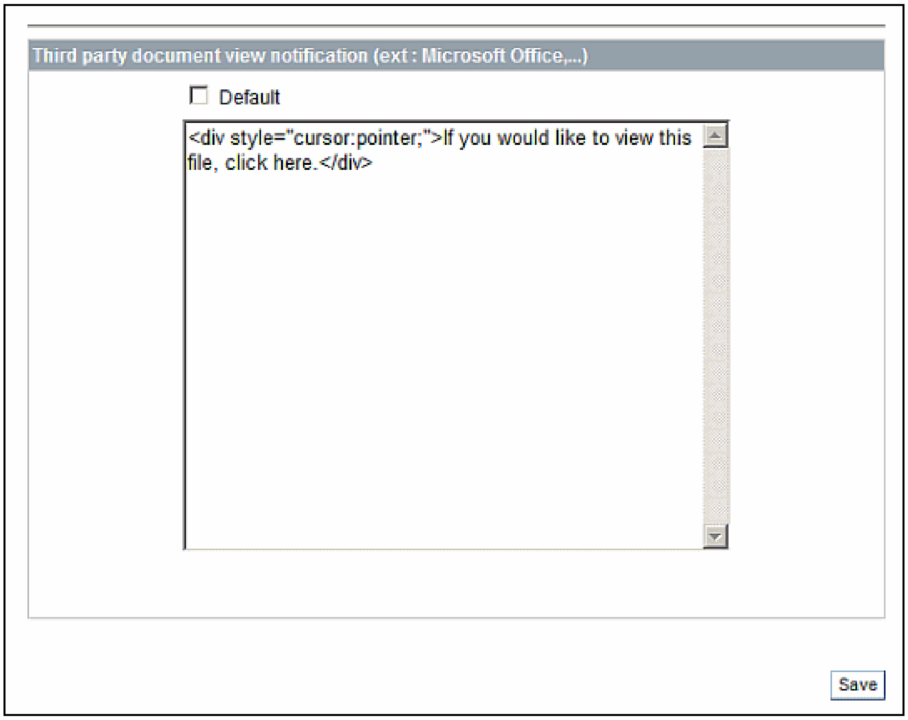


Figure 232 Document View Notification Configuration Page

ii. Select the **Default** option if you want the default text shown in the window to be displayed on the Article Display page for a binary document view.

- Or -

Configure the required text with the style to be displayed on the Article Display page.

iii. Click **Save**. The Document View configuration is saved.

The following figure shows the default Document View text displayed on the Article Display page when a Portal User tries to view a word document:

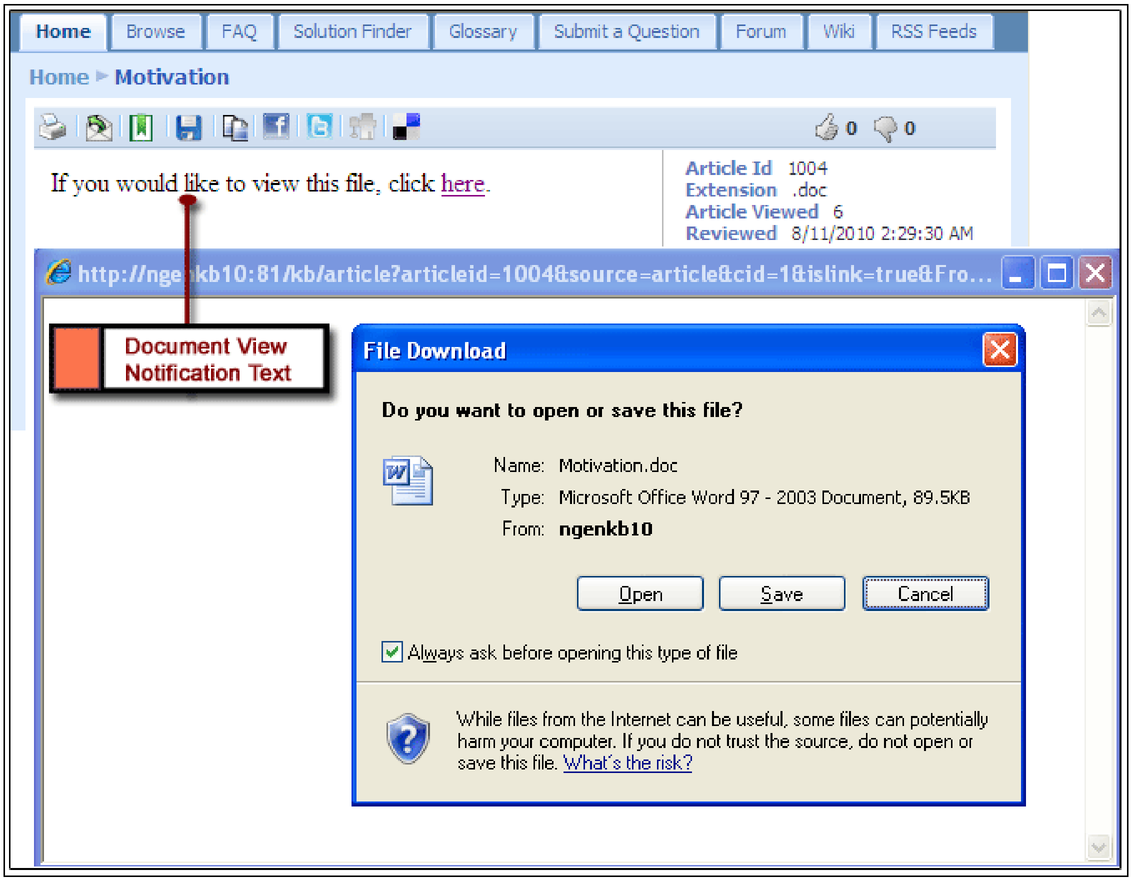


Figure 233 Document View Notification Text on Portal

Portal Style

You can select one of three portal styles. The portal style defines the portal layouts, portal tab format, search layouts, and more. To change the Portal style, click **Edit** in the Portal Style area on the Portal customization page.

Click **Go to Portal** to see a preview of the Portal.

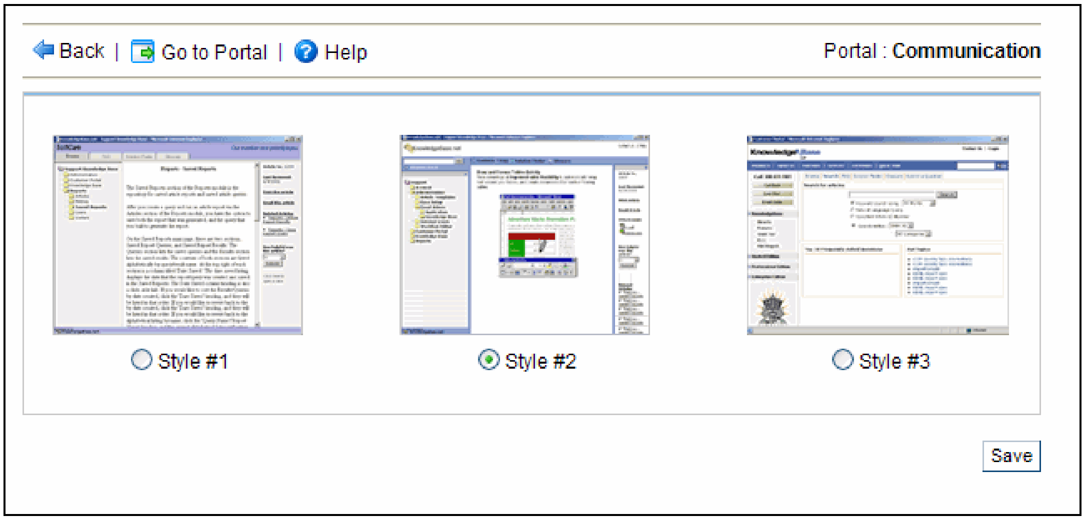


Figure 234 Portal Styles Page

> **Note**
>
> The **Portal Style** section is displayed on the Portal Customization page only for Portals created using Portal Style #1, Portal Style #2, or Portal Style #3.

Portal Display

In the main frame of the Portal customization page, there is a picture of a Portal and a number of links around the Portal. Click any of the links to customize that specific feature.

If you want to work on a different Portal, you can select from the Portal list in the menu on the upper right of the page.

If you have a Portal that requires user login, click to customize the text that appears on the Portal login page.

> **Note**
>
> For more complete and flexible Portal customization options, be sure to also evaluate the customization possibilities that are available by using the Portal Snap-Ins, a feature that is also available on the Portal tab in KB Administrator.

Feature	Portal Style 1	Portal Style 2	Portal Style 3
Title	X	X	X
Logo	X	X	
Color Scheme	X	X	X
Frame Size	X	X	

Top Text	X	X	
Side Text	X	X	
Bottom Text	X		
HTML Text			X
CSS Style Sheet			X

Portal Title

The Portal Title is in the title bar of the browser window. Click the **Title** link. The Title page is displayed.

In the **Title** field, type the name of your Portal, and click **Save**.

Portal Logo

You can add your company logo to your Portal. Your logo can be uploaded from your local system and displayed at the top right or the top left of your Portal.

To upload a logo from your local system, click the **Browse** button in the Portal Logo window. The Choose File dialog box is displayed. Select a file (.gif or .jpeg) on your computer and click **Open**. The window closes saving the location in the text box in the Portal Logo window. The logo feature is only available in Portal Styles 1, and 2.

Notes:

- Use HTML commands in the Top Text window to specify the position of the logo.
- You can also place the Portal logo in web file manager and use HTML to call, and position in the top text area.
- The **Portal Logo** option is available only for Portals created using Portal Style #1, Portal Style #2, or Portal Style #3.

Portal Top Text

Use the Top Text window to add and customize the text that appears at the top of your KB Portals.

In the Top Text window, you can type straight text that appears in the Portal or use HTML code to customize the appearance and location of the text.

Enter the text and/or HTML and click **Save**. The text appears in the area at the top of the KB Portal.

Notes:

- You can use the Top Text area to move the text and the logo to the right or the left side of the portal. Use HTML commands to customize the text or logo location.
- The **Portal Top Test** option is available only for Portals created using Portal Style #1, Portal Style #2, or Portal Style #3.

Here are some examples:

```
text (font:Verdana, bold) on the right:
<div align=right><font face=verdana size=2><b>Welcome to the Portal</
b></font></div>
- simple logo on the right:
<div align=right>[[logo]] </div>
- logo on the left, text (font:Verdana, bold) on the right :
<table width=100%>
<tr>
            <td align=left>[[logo]] </td>
            <td align=right><font face=verdana size=2><b>Welcome to
our Portal</b></font></td>
</tr>
</table>
- making the logo to a site
<a href=http://www.abc.com target=_blank>[[logo]]</a>
You can also add an image from the attachment library instead of the
logo. Substitute:
 [[image:<attachment ID>]]
Where <attachment ID> is from the attachment library, for example:
[[image:100]
```

]

Tip

An easier way to add images or other files to appear in the Portal customization area is by using the Web File Manager. You can upload any file into the Web File Manager and just use the file location (URL in web file manager) and HTML commands to reference the file in the Portal customization areas.

Portal Side Text

You can add text that appears in the right side of the portal, beneath the Article rating.

Type the text that you want to add in the Info Bar text window and click **Save**. The text is saved, and is displayed in the Portal

---

Example

If you want to add an email link in the side window, use the HTML command such as the one below:

Click here to contact us.

> **Note:**
>
> This option is available only for Portals created using Portal Style #1, #2, or #3.

Bottom Page Text

You can add text that appears at the bottom of your KB Portal.

In the **Bottom Page** text window, type the text you want to appear at the bottom of the Portal, then click **Save**.The new text is saved and appears in the bottom of the Portal window..

Example

If you want to add a copyright notice with a link, you can use the HTML command such as the one below:

Copyright (c) 2000 - 2009 ABC Corporation..

> **Note:**
>
> The Bottom page text is only available with Portal Style #1.

HTML Text

Using HTML text option you can custmize te appearance and custom functions.

Since Portal Style #3, and Portal Style #4 do not utilize frames, the Knowledge Spaces™ Administrator can customize the display of the Portal using HTML. The Administrator should know HTML to customize the header, before and after fields. The feature is similar to the top and side text options explained above. The HTML header, HTML before and HTML after text boxes are displayed around the search box on the Portal page.

Click the **HTML Text** link in the **Portal Customization** main page to customize the look, feel, and design of the portal. The page to add the HTML code is displayed.

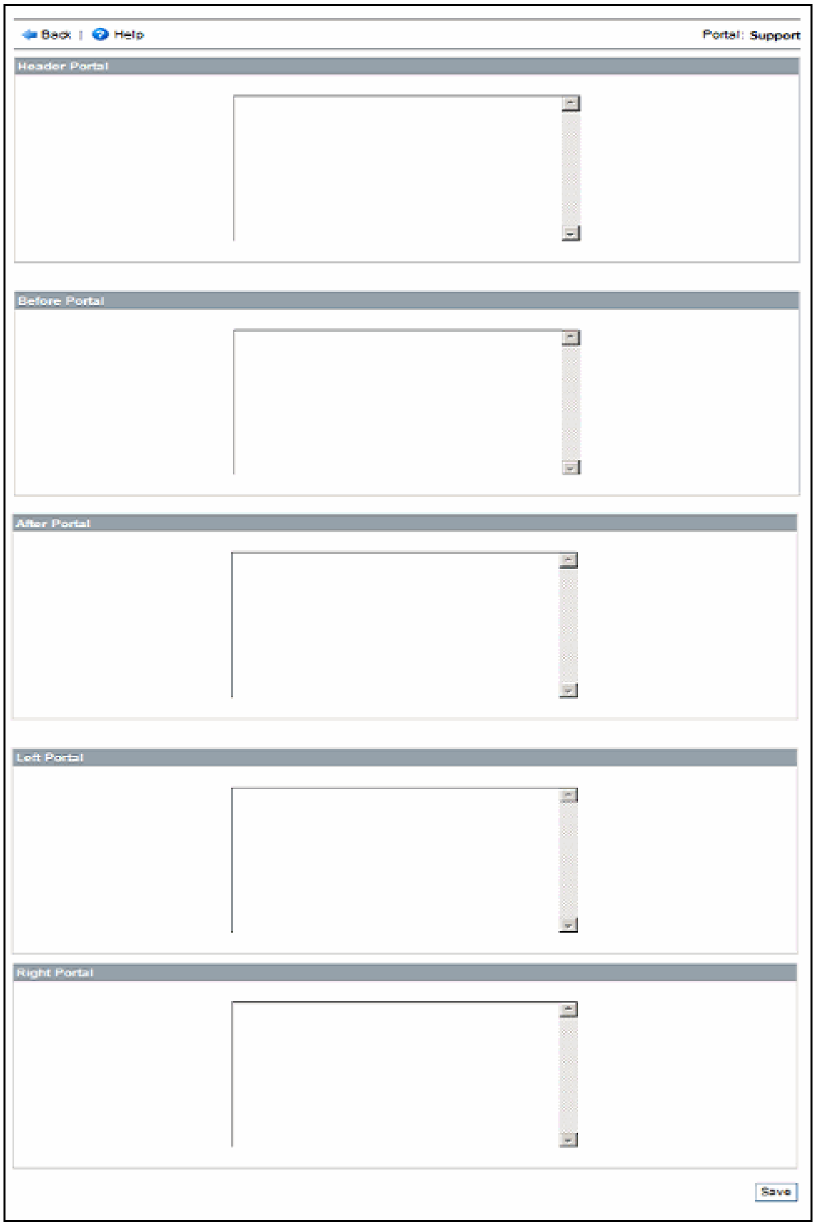


Figure 235 Portal HTML Customization Page

Header Portal

The content for the Portal header is inserted in the **Header Portal** section. The content must be any html content permitted in headers, such as Meta tags, stylesheet links, or script references.

> **Note:**
>
> There is no error checking. Ensure that the code you have entered gives the desired effect, especially if you have added scripts or stylesheet links.

Code showing where you Header content will be inserted

```
<!doctype html public "-//w3c//dtd xhtml 1.0 transitional//en"
"http://www.w3.org/tr/xhtml1/dtd/xhtml1-transitional.dtd">
  <html xmlns="http://www.w3.org/1999/xhtml">
  <head id="ctl00_htmlHead">
  <script src="/Content/js/ext/all.js" type="text/javascript"></
  script>
  <script type="text/javascript" src="/content/js/master.js"></
  script>
  <link rel="stylesheet" type="text/css" href="/content/css/navy/
  styles.css"/>
  <title>Customer Portal</title>
  Your Header content is inserted here
  </head>
  <body>
  </body>
```

Before Portal

The Before Portal content is displayed at the top of the Portal. This text area can use any html tags except the <html>, <body>, or <head> tag

Note

- If you use the <html>, <body>, or <head> tag for Before Portal, the tag will not be stripped and it will break the functionality of the site.
- There is no error checking on this content. Ensure that you preview the Portal to check that the content entered hasn't broken the page. Ensure that you use current html markup practices and properly nest and close all the html tags.

After Portal

The After Portal HTML content is displayed at the bottom of the Portal. Ensure that you properly format and preview the Portal to make sure it works correctly.

> **Note:**
>
> After you configure the Before Portal and After Portal content for the Portal, you can configure the position of the content on the Portal by setting values for the Portal Top Bar Height and Portal Bottom Bar Height respectively on the Color Scheme Template page.
>
> For more information about working with Style Builder, see **"Design Elements for Portals Using Portal Style # 4" on page 282**.

Portal Login Page Text

The **Settings** window enables you to customize the text that your users see on the Login page of a **Registration Required** Portal or a **Username Required** Portal.

> **Note:**
>
> The Portal Login Page Text option is available only for Portals created using Portal Style #1, #2, or #3.

Login Page Text

In the **Login Page** text field, type the text you want your users to see on the **Portal login** page, then click **Save**.

Example

If your Portal is a username required Portal, and is intended for use by your technical support staff, you might specify the following login page text: Welcome to the Technical Support Knowledge Base.

CSS Style Sheet

You can customize the Search Results page, and Search Landing pages of the Portals designed using **Portal Style #3** and **Portal Style #4**. To do so, In the **Portal Customization** area on the Portal Customization page of the Portal, click the **CSS Style Sheet** link. The Custom Style Sheet page is displayed. Customize the pages as required and click **Save**.

Portal Style Builder for Portals Using Portal Style #1, #2, #3

The Portal Style Builder for a Portal designed using Portal Style #1, #2, or #3, offers wider color options to customize the look and feel of the Portal. You can create new Color Scheme templates, and save them as built in templates for other Internal Users to use when customizing the look and feel of a Portal.

Creating a Portal Color Scheme Template

1. On the Portal Customization page of a Portal, click the **Color Scheme** link in the Portal Customization area. The **Knowledge Spaces Style Builder** page is displayed.

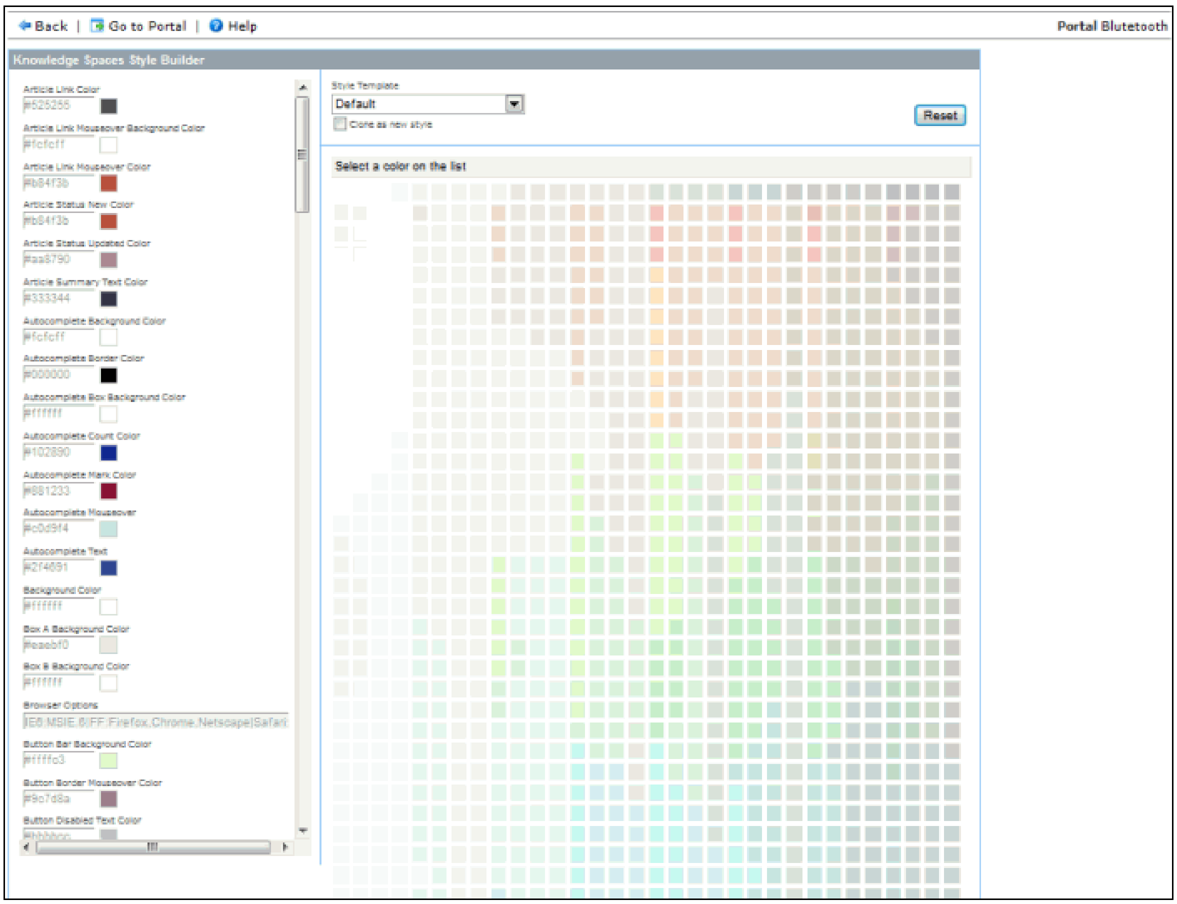


Figure 236 Knowledge Spaces™ Style Builder Page

2. Select **Default Template** in the **Style Template** list. This is the template available by default when you install Spaces by Moxie™ - Knowledge Spaces™.

> **Note:**
>
> You cannot modify the **Default Template**. However, you can copy the styles from the Default Template and create a new version of the Template.

3. Select the **Clone as new style** option. The options to create a new Template that are displayed on the Knowledge Spaces™Style Builder page.

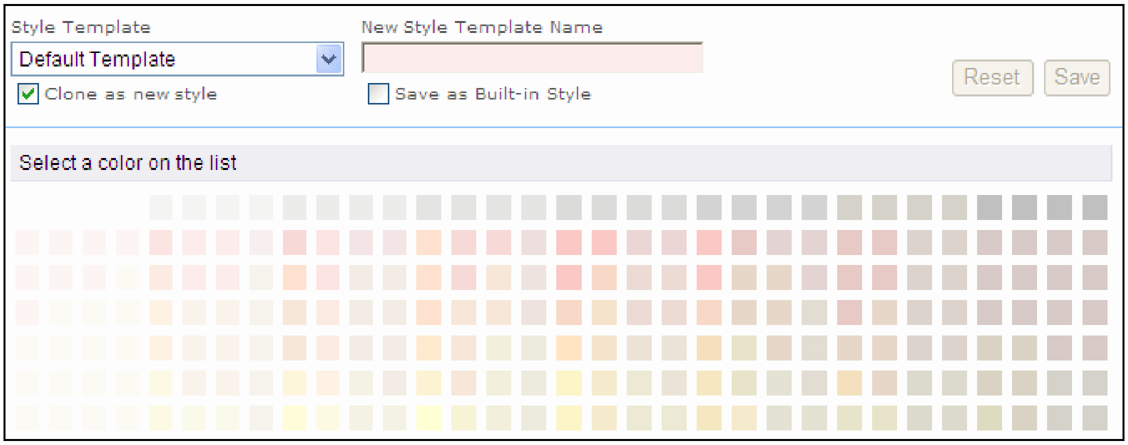


Figure 237 Creating a Portal Color Scheme

4. In the **New Style Template Name** field, specify a name for the Template.
5. For each of the options listed in the left on the Knowledgebase Style Builder, select the required colors.
6. Select the **Save as Built-in Style** option if you want to save the Template as a Build in Style Template.
7. Click **Save**. The new Color Scheme Template is saved.

Setting the Color Scheme for a Portal

To set the Color Scheme for a Portal, carry out the following steps:

1. On the Portal Customization page of the Portal, click the **Color Scheme** link in the Portal Customization area. The Knowledge Spaces™ Style Builder page is displayed.
2. From the **Style Template** list, select the required color template to be used to customize the color of the options on the Portal.
3. Click **Save**. The color scheme is applied for the Portal.

   The following figure illustrates the customized Search Options page on a Portal:

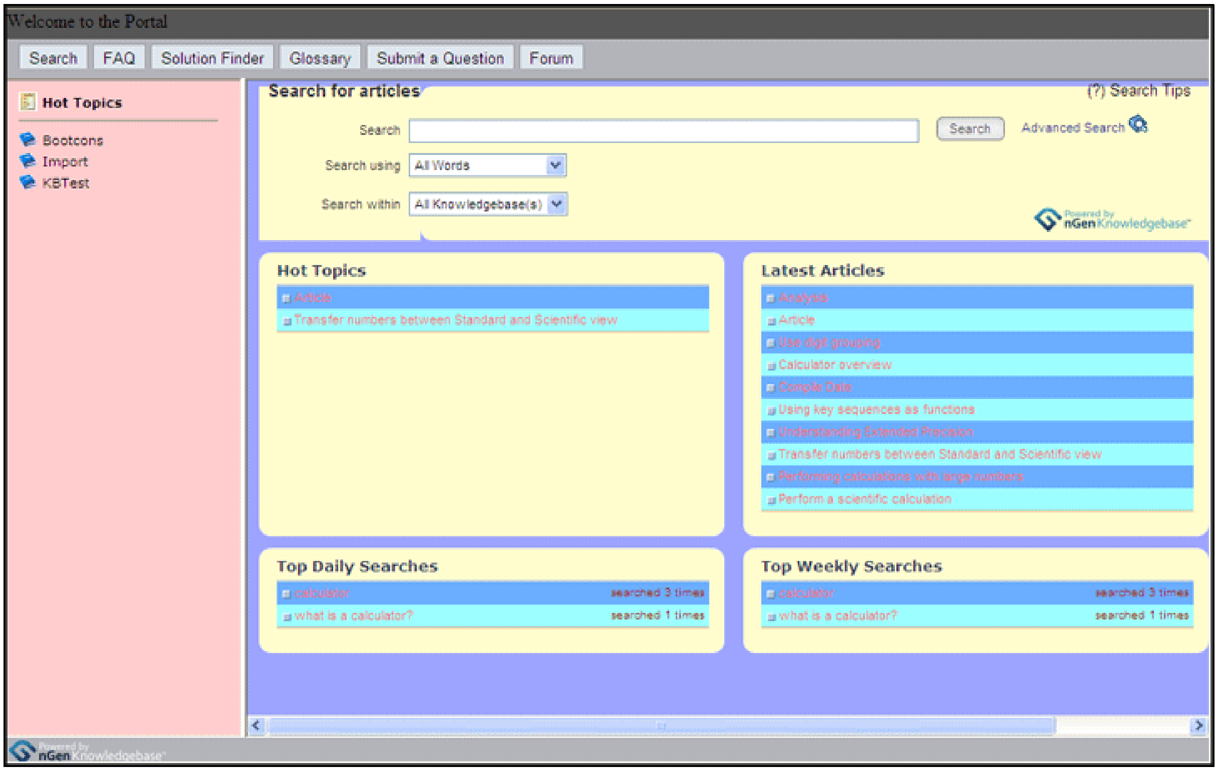


Figure 238 Customized Portal Search Page

Design Elements for Portals Using Portal Style # 4

The Design Elements for a Portal Style # 4 Portal offers options to customize the appearance of a Portal. You can access Portal Design Elements by clicking the **Design Elements** link on the Portal Customization page of a Portal. Design Elements enables you to create new Themes for a Portal, configure various Element Groups of a Portal, manage the Themes created for a Portal, set an active Theme, and modify the layout for a Portal.

The following figure shows the default view of the Elements tab on the Design Elements page for a Portal Style #4 Portal:

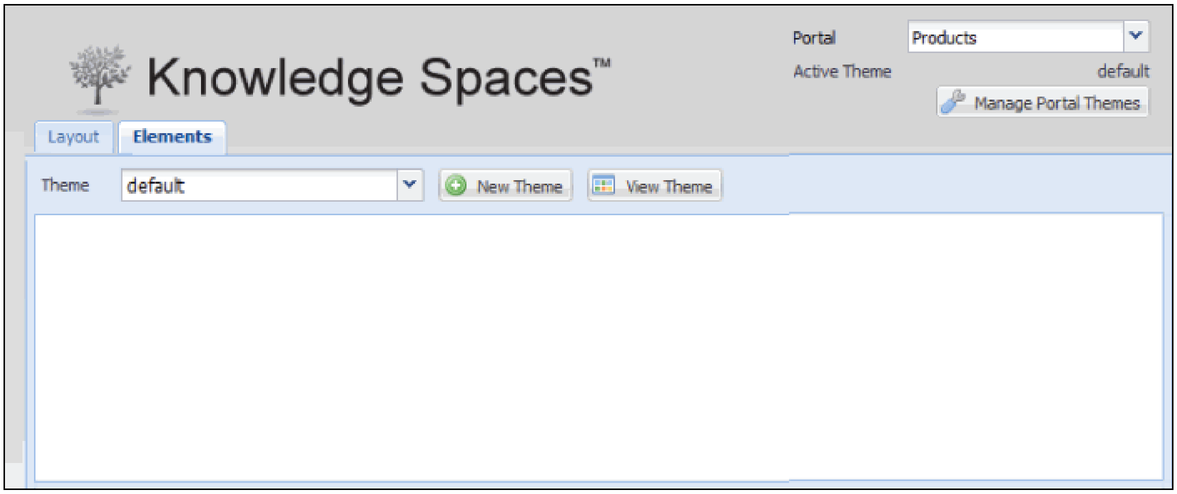


Figure 239 Design Elements Page for a Portal Style #4 Portal

From the **Portal** list at the top right on the **Design Elements** page, select a Portal.The Design Elements page with the styling options available for the Portal is displayed. The following table describes the options available in the Design Elements page:

Option	Description
Active Theme	Displays the name of the Portal Theme applied for the selected Portal.
Manage Portal Themes	Click to manage the Portal Themes available for the selected Portal.
Layout	Enables you to set the display layout for the selected Portal. For more information on setting a display layout for a Portal, see **"Layout Tab" on page 283**.
Elements	For a selected Portal in the **Portal** list, the Elements tab provides options to create new Portal Themes, set an Active Theme for the Portal, configure the look and feel of various Element Groups on the Portal. **Note**: For more information about the Elements tab, see **"Elements Tab" on page 285**.

Layout Tab

The **Layout** tab on the **Design Elements** page enables you to set the display layout for a selected Portal in the **Portal** list. The following figure shows the Layout tab:

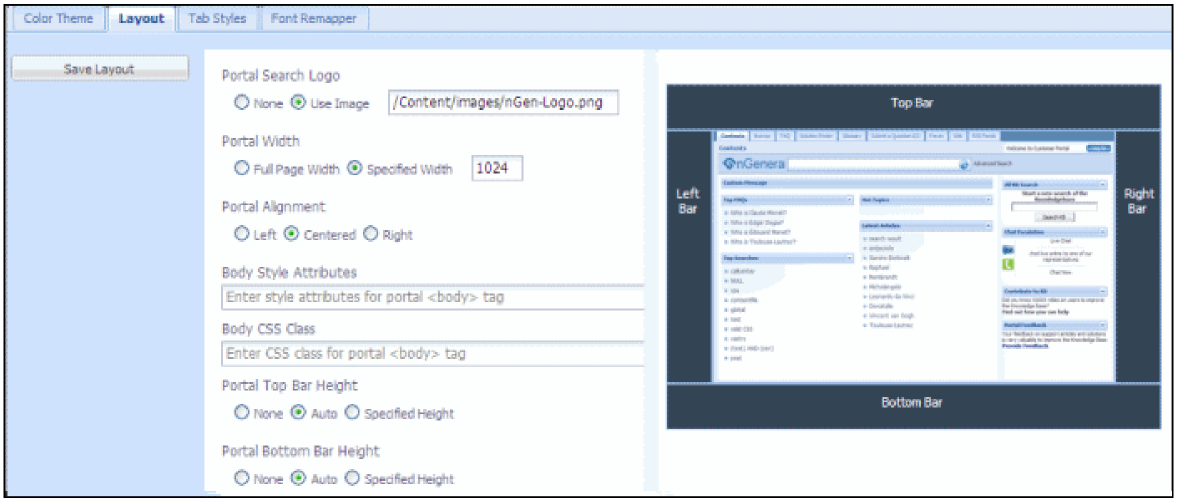


Figure 240 Layout Tab

The following table describes the options available in the Layout tab:

Options	Description
Portal Search Logo	Enter a logo for the Search box that appears on several pages of the Portal. If you want to use your own logo, click the **Use Image** radio button and upload a new image by clicking the browse folder button. Note: Ensure that the width of the logo is less than or equal to 32 pixels.
Favicon	Enter a favicon for your portal. Favicons are retained with bookmarks and show in browser title bars or tabs depending on the browser being used. Note: To ensure cross-browser support, use an image of type ".ico".
Tab Panel Height	Enter a fixed height of the Portal in pixels. Enter the height of the main tab panel for the Portal. • The default option is **Fit to Window** which forces the tab panel to resize to fit the dimensions of the browser window. • The **Specified Width** option sets a fixed height of the tab panel. This option allows the Portal to have vertical scroll bars present for the entire page if the specified height is less than the height of the browser window.
Portal Width	Specify that the Portal takes up the entire width of the browser, or a fixed width.
Portal Alignment	If a Portal Width is specified, the Portal can be aligned with padding on both sides (Centered), on the right (Left), or on the left (Right).
Body Style Attributes	Enter the style attributes for the Portal body tag. For example: background-color:#ff0000 or color:#ff0000.
Body CSS Class	Enter a CSS class for the Portal body tag.

Options	Description
Portal Top Bar Height	Enter the height for Portal Top Bar. You can specify "None" to turn off the Top bar height or use "Auto" to have the height automatically calculated by KB, or "Specified Height" to precisely control the height.
Portal Bottom Bar Height	Specify the height for the Portal Bottom Bar. You can specify "None" to turn off the Bottom bar height or use "Auto" to have the height automatically calculated by KB, or "Specified Height" to precisely control the height.
Portal Top and Bottom Bar Fill	Specify whether the Top Bar and Bottom Bar should fill the entire width of the browser window or the width that the tab panel takes up.
Save Layout	Click to save the changes on the tab. The page displays a preview of the Portal after the changes.

Note:

The image at the right on the page is modified as you make selections, so you can get a rough idea of the effect of the selections in this tab.

Elements Tab

The **Elements** tab in the **Design Elements** page provides options to create new Portal Themes for a Portal, set an Active Theme for the Portal, and configure the display of various Element Groups on the Portal.

The following figure shows the Elements tab on the Design Elements page:

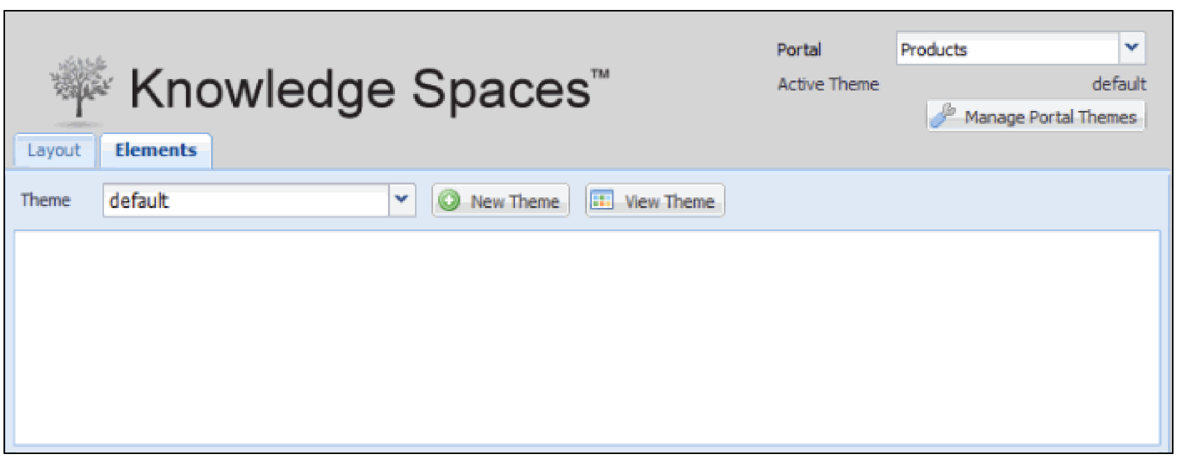


Figure 241 Design Elements Page - Elements Tab

In the Design Elements page, select a Portal from the **Portal** list. The following table describes the options available in the Elements tab for a selected Portal:

Option	Description
Theme	The **Theme** list includes the list of Portal Themes available for the Portal. **Note**: • The Knowledge Spaces™ product is shipped with the **Default** and **Bronze** Portal Themes. These Themes cannot be renamed or deleted. • By default, a newly created Portal Style #4 Portal is automatically associated with the **Default** Portal Theme.
New Theme	Enables you to create a new Theme for the Portal. For information on creating a new Theme for a Portal, see **"Creating a New Portal Theme" on page 286**.
Set As Active Theme	Enables you set a selected Theme from the **Theme** list as the Active Theme for the Portal.
View Theme	Click to preview the Portal with active Portal Theme applied. Note: • Viewing a Portal Theme will not include unsaved changes you may have made to the Element Groups. • Ensure that you have saved any changes before clicking this button. Clicking this button will open a new window to the portal. Ensure previous portal view windows have been closed before clicking this button. All these windows share the same session and therefore may not have the updated changes if they are not closed.
Element Groups	For a selected Portal Theme in the **Theme** list, the Element Groups section enables you to design the display of various Portal Element Groups. **Note**: • The Element Groups section is not available for the **Default** and **Bronze** Portal Themes. • For detailed information about configuring each Element Group available for a Portal, see the **Knowledge Spaces™ 9.4Portal Style Guide**.
Options	Provides options to export and import the descriptions of a Portal Theme, and the option to display and use the deprecated Portal Styling feature from the earlier versions of Knowledge Spaces™.
Save	Click to save the Element Group configurations you have done for a Portal Theme.

Creating a New Portal Theme

A Theme controls the colors, fonts, and buttons for a Portal Style #4 Portal.

To create a new Portal Theme for a Portal, carry out the following steps:

1. From the **Portal** list on the Design Elements page, select the Portal for which you want to create a Theme.
2. From the **Theme** list in the Elements tab, select the Theme based on which the new Portal Theme must be created.
3. Click **New Theme**. The **New Theme** page is displayed.

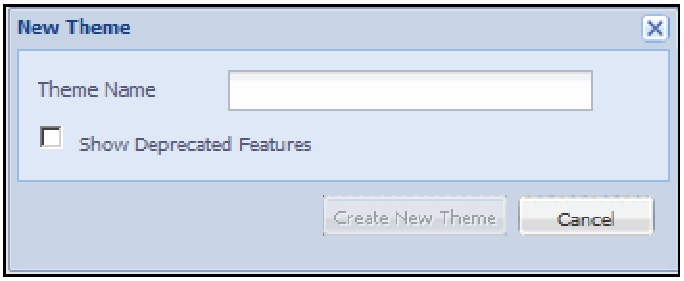


Figure 242 New Theme Page

4. In the **Theme Name** field, enter a name for the Portal Theme.
5. If you want to create the Theme using the Color Theme options provided in earlier versions of Knowledge Spaces™, select **Show Deprecated Features**. This step is optional.

   The following page is displayed:

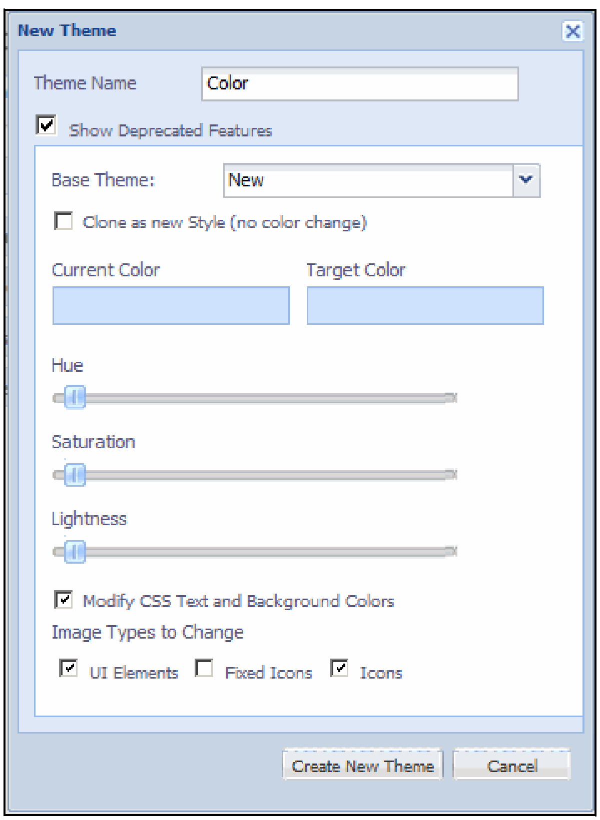


Figure 243 New Theme Page with Theme Options Provided in Earlier Versions

The following table describes the Theme options built in previous versions of Knowledge Spaces™:

Options	Description
Base Theme	Select the base Theme template for the new Theme.
Clone as New Style (no color change)	Select **Clone as New Style** if you want to use the same color scheme set in the selected template. **Note**: The other color scheme options on the page will disappear when you select this option.
Current Color	The C**urrent Color** field displays the color that is set for the template.
Target Color	The **Target Color** field displays the color that you newly set for the template.
Hue	The **Hue** field displays the color range to choose from, for the Portal.
Saturation	The **Saturation** field displays the intensity range to choose from, for the Portal.
Lightness	The **Lightness** field displays the range for the tone of a specific hue.
Modify CSS Text and Background Colors	Select this option if you want to change the CSS text and background colors of the Portal to the new color.
Image Types To Change	Select the Image Type for which you want to change the color.

6. Click **Create New Theme**. The New Portal Theme is created and displayed in the **Theme** list within the Elements tab.

Note

- Click the **Set as Active Theme** button to change the Portal's Elements Theme to the newly created Theme.
- Click **View Theme** to preview the Portal with the newly created Theme.
- You can further configure the Portal Element Groups for the newly created Theme.

Managing Portal Themes

You can manage the Portal Themes created for a Portal. From the **Portal** list in the Design Elements page, select the Portal whose Themes you want to manage. Click **Manage Portal Themes**. The Manage Portal Themes page with the list of Themes available for the Portal is displayed.

The following figure shows the Manage Portal Themes page for a Portal:

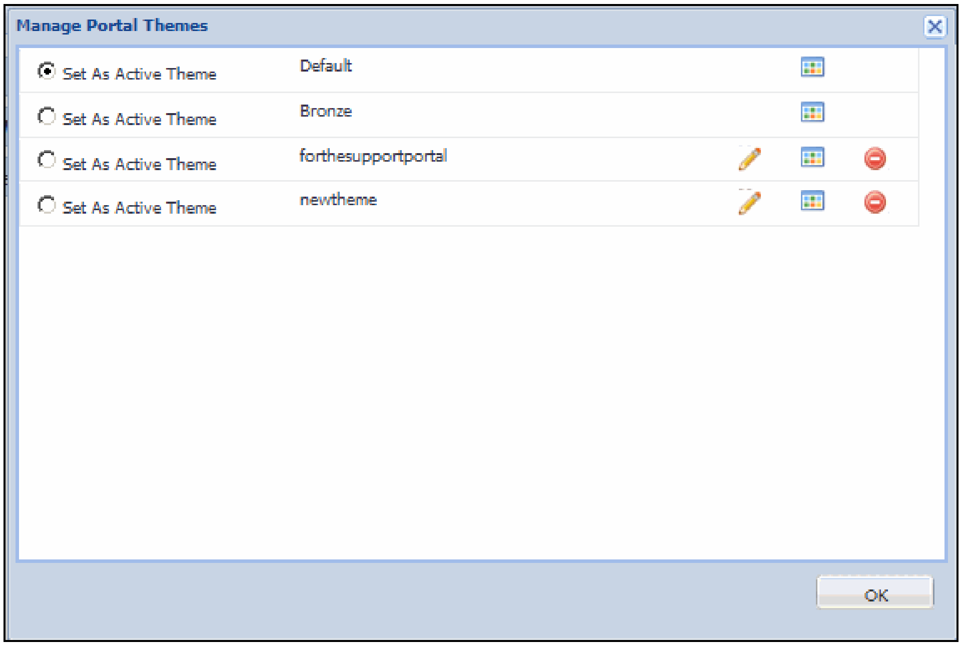


Figure 244 Manage Portal Themes Page

- To set a Theme as Active Theme for the Portal, click the **Set As Active Theme** option in the row where the Theme is listed.

- To rename a Portal Theme, click in the row where the Theme is listed. The Rename Theme dialog box is displayed. Rename the Theme as required and click **OK**.

- To delete a Portal Theme, click in the row where the Theme is listed. The Delete Theme dialog box is displayed. Click **OK** to delete the Theme.

Note:

The **Default** and **Bronze** Themes are built in Themes in Knowledge Spaces™ and cannot be edited or deleted.

- To preview the Portal with a specific Theme, click (View this Theme) in the row where the Theme is listed. The Portal page with the applied Theme is displayed.

Exporting and Importing the Descriptions of a Portal Theme

The Design Elements page provides the **Export this Definition** and **Import Definition** options, which enable you to export the descriptions of a Portal Theme as a definition file, and then import the definition file to the Portal Theme on a different Portal.

To export the descriptions of a Portal Theme, carry out the following steps:

1. From the **Portal** list on the Design Elements page, select the Portal to which the Portal Theme you want to export belongs.

2. From the **Theme** list in the **Elements t**ab, select the Theme you want to export.

> **Note:**
>
> You can only export the descriptions of a Theme that has Element Group configurations. This will not export other changes to portal styling. For example, a custom stylesheet uploaded using the **HTML Text** option on the Portal Customization page in Knowledge Spaces™ Admin Control Panel is not exported.

3. Click **Options**, and select the **Export this Definition** option. The definition file is downloaded into the **Downloads** folder set for the browser.

To import a definition file to be applied to a Portal Theme, carry out the following steps:

1. From the **Portal** list on the **Design Elements** page, select the Portal to which the Portal Theme you want to apply a definition file belongs.
2. From the **Theme** list in the Elements tab, select the required Theme.
3. Click **Options**, and select the **Import Definition** option. The **Import Definition** dialog box is displayed.

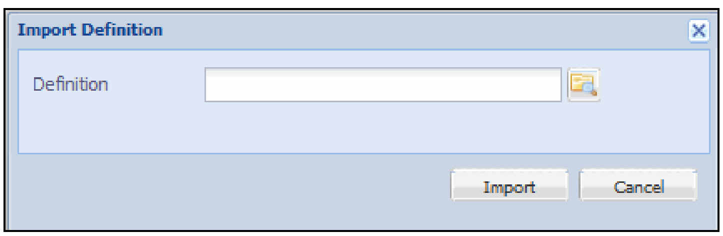


Figure 245 Import Definition Dialog Box

4. Click . The **Choose File to Upload** window is displayed.
5. Browse and select the Definition file you want to import, and click **Open**.
6. Click **Import**. The Definition file is imported, and the descriptions from the imported definition file are applied to the selected Portal Theme.

Tab Styles

The **Tab Styles** tab enables you to set the tab styles for the different tabs in the Portal..

> **Note:**
>
> The Tab Styles feature was by default available on the Portal Style Builder page in earlier versions of Knowledge Spaces™. The feature has been deprecated now. To continue using the Tab Styles feature, from the Elements tab, click **Options**, **Deprecated features**. The Tab Styles tab is displayed on the Design Elements page.

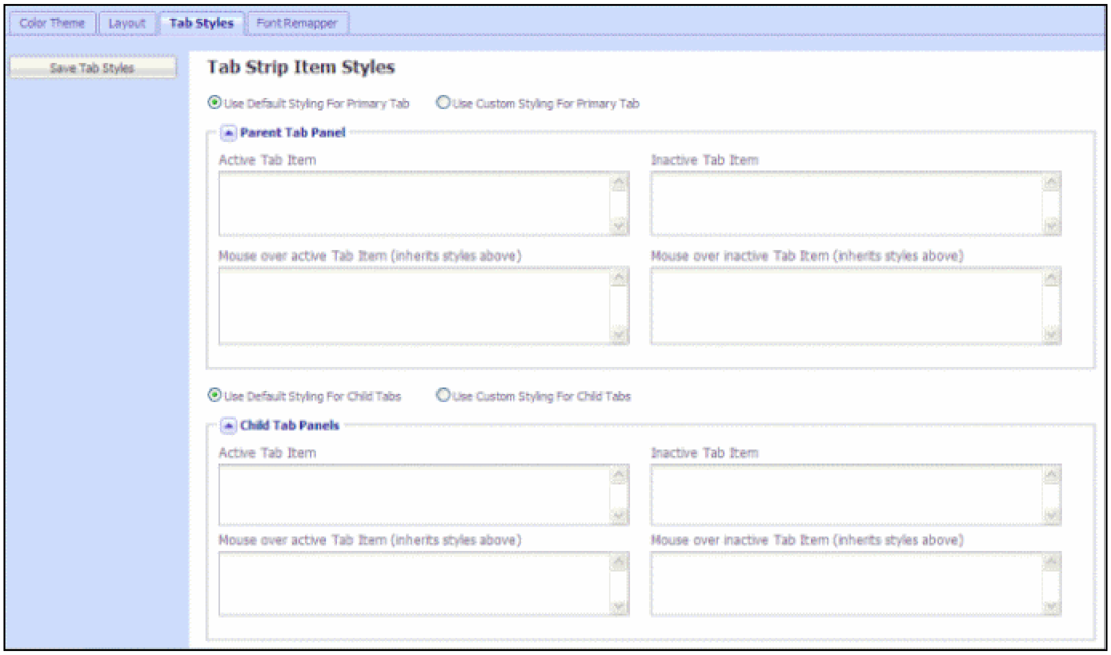


Figure 246 Tab Styles Layout

The following table describes the options in the deprecated Tab Styles tab:

Options	Description
Use Default Styling For Primary Tab	Select this option to use default styling for the Primary tabs in the Portal.
Use Default Styling For Child Tabs	Select this option to use default styling for the child tabs in the Portal.
Use Custom Styling For Primary Tab	Select this option to use custom styling for the Primary tabs in the Portal.
Use Custom Styling For Child Tabs	Select this option to use custom styling for the child tabs in the Portal.
"Save Tab Styles" button	Click this button to save the newly selected tab style.

Font Remapper Tab

The **Font Remapper** tab enables you to set the font for the Portal. You can add new fonts to be used in the Portal, change the name of the fonts available in Knowledge Spaces™, or even create a copy of the existing fonts before editing them.

> **Note**
>
> - If you remap all existing fonts to a single font, the action cannot be undone.
> - The **Font Remapper** feature was by default available on the Portal Style Builder page in earlier versions of Knowledge Spaces™. The feature has been deprecated now. To continue using the deprecated Font Remapper feature, from the Elements tab, click **Options**, **Deprecated features**. The Font Remapper tab is displayed on the Design Elements page.

Figure 247 Font Remapper Tab

The following table describes the options in the deprecated Font Remapper tab:

Options	Description
"Select" button	Click the **Select** button to select a font from the list of available fonts in Knowledge Spaces™. The following types of fonts are available by default: • PC Fonts • Mac fonts • Generic
Font	Specify the font to be selected for display in the Portal. The fonts available in the CSS stylesheets are listed upon selection.
"Apply Font Change" button	Click this button to set the new font for the Portal.
"View this Theme" button	Click this button to have a preview of the new font selected for the Portal.

About Mobile Portal Configurations

Spaces by Moxie™ - Knowledge Spaces™ enables an Administrator to configure a Mobile Portal for any **Portal Style # 4** Customer Portal. Mobile Portals allow Users to search or browse for Articles and view Article Content on a mobile device. Apart from searching for Articles and viewing Article contents on the Mobile Portal as well as subscribe for Articles, unsubscribe from Articles and post Article links to Social Network sites through the mobile device.

A Mobile Portal does not replace the Customer Portal, it provides a more user-friendly experience for users of a **Portal Style # 4** Customer Portal that are accessing the Knowledgebase with a Mobile device. Mobile Portal only provide search, browse, article view functions. FAQs, Glossaries, Solution Finders, and ATR features are not available for a Mobile Portal the Mobile device has limited screen space.

Mobile Portal Configuration

You can configure a Mobile Portal for any **Portal Style # 4 Customer Portal** by clicking the **Mobile Configuration** option in the Portal Customization page of the Portal.

Note

- Before you access the Mobile Configuration page, ensure that you have configured the Popup blocker on your browser to allow pop-ups from your Knowledgebase site.
- A Mobile Portal can be an Open Portal, Registration Required Portal, Secure Portal or Personalized Portal.

The following figure shows the Mobile Configuration page for a Portal: The Mobile Configuration Page

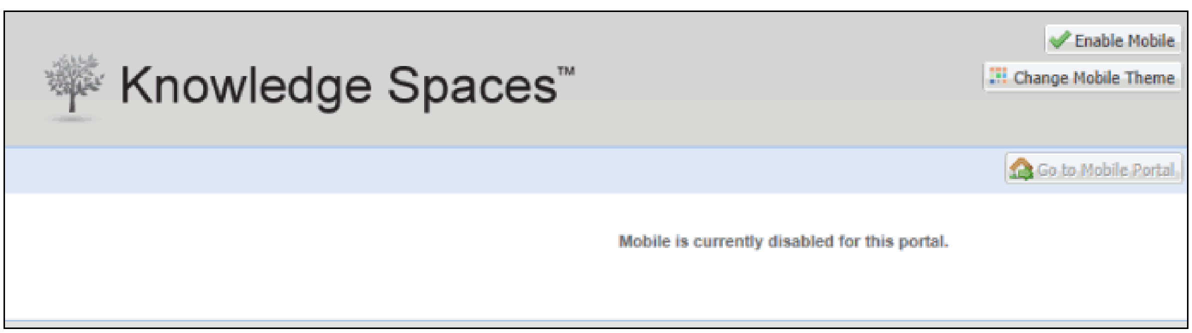


Figure 248 Mobile Configuration

The following table describes the options available on the Mobile Configuration page:

Options	Description
Enable Mobile	Click to enable **Mobile Portal** option for a Customer Portal.

Options	Description
Change Mobile Theme	By default the Moxie Theme is applied to a Mobile Portal. Click **Change Mobile theme** to upload new CSS files for a Mobile Portal Theme.
Go to Mobile Portal	Click to launch the Mobile Portal on a browser. This provides a preview of how the Mobile Portal user Interface appears. The **Go to Mobile Portal** option is accessible only when the Mobile Portal is enabled. **Note**: You can preview the Mobile Portal only on **Chrome** and **Safari** browsers

Enabling a KB Portal as a Mobile Portal

To enable a Mobile Portal, carry out the following steps:

1. In the **Portal Customization** area on the **Portal Customization** page of the Portal, click the **Mobile Configuration** link.

   The **Mobile Configuration** page is displayed as shown in the following figure.

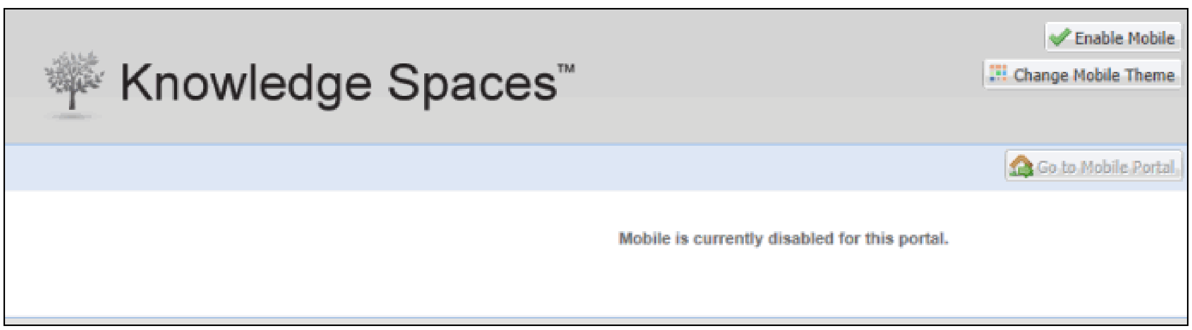


Figure 249 Mobile Configuration Page

2. In the upper right corner of the **Mobile Configuration** page, click **Enable Mobile.** The Mobile Portal is enabled, and the **Mobile Configuration** page displays the **Home** and **Sign In** tabs to enable you to configure the **Home** page and **Sign In** page for the Mobile Portal.The following figure shows the Customizable modules page:

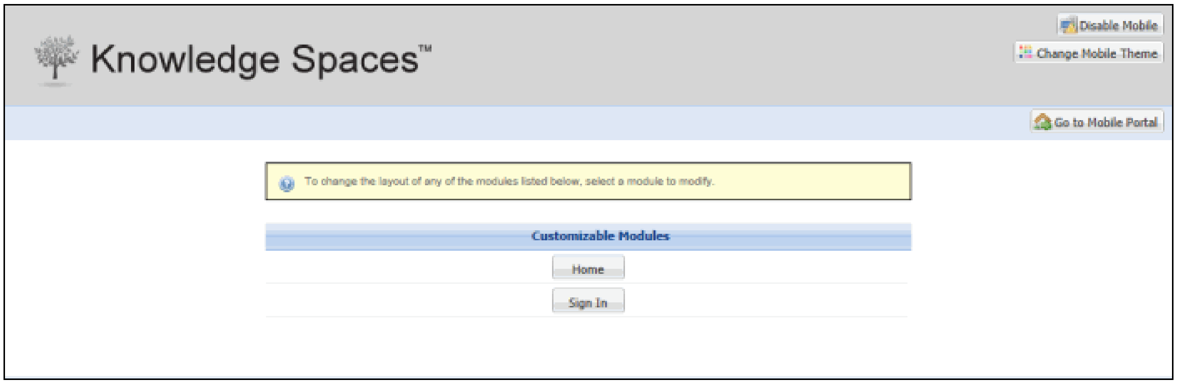


Figure 250 Customizable Modules

Configuring the Mobile Portal Home Page

Mobile Configuration page enables you to create and configure views for the Home page of the Mobile Portal. Click the **Home** button on the **Mobile Configuration** page, the Custom Views for **Home** section is displayed on the page. The **Custom Views** for **Home** section displays a default **Home page View** that is already applied to the Mobile Portal. The Default Home page View can be edited or copied to create new Home page views. In addition, each View listed in the Custom Views section displays the names of the Mobile Portals to which the **View** is applied.

Custom Home Page View for a Mobile Portal

You can create custom Home page Views for Mobile Portals and configure the widgets to be available for the View.

Note:

A Custom View can be applied to any number of Mobile Portals and not just the Mobile Portal for which it is created.

Creating a Custom Home Page View

You can create **Custom Home Page Views** for Mobile Portals. A Custom View created for a Mobile Portal can be viewed and applied to the other Mobile Portals. To create a Custom Home page view, carry out the following steps:

1. In the **Custom Views** for **Home** table on the Mobile Configuration page, click 

. The **View Name** window is displayed.
2. Enter a name for the View and click **Create**.

> **Note:**
>
> You cannot have two Views with the same name.

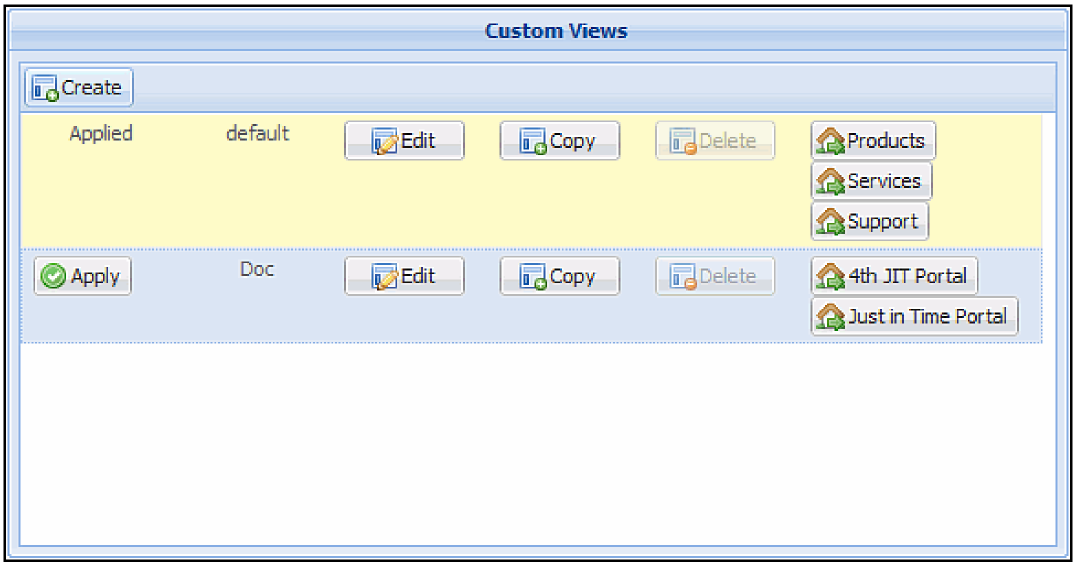
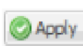


Figure 251 Custom Views Section

3. The new view created is listed in the **Custom Views** section.

4. Click  on the new view created to apply this view to the Mobile Portal.

Editing a Custom Home Page View

You can edit a Custom Home Page View to configure the widgets to be displayed for the View on the Mobile Portal.

1. In the **Custom Views Home** page, click  next to the name of the view you want to edit. The **Edit Custom Widgets** page with the widgets you can configure for the Portal is displayed as shown in the following figure.

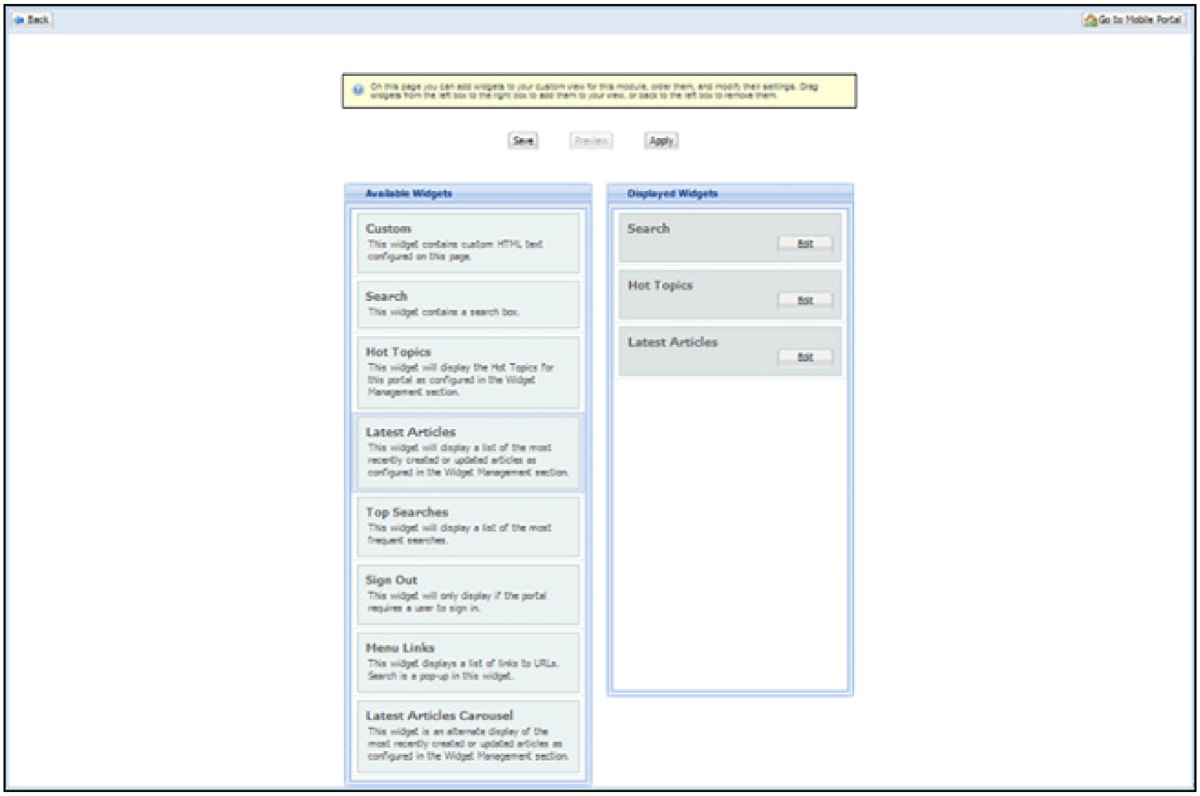


Figure 252 Edit Custom Views page

2. From the **Available Widgets** pane, drag and drop the widgets to be displayed on the Mobile Portal to the **Displayed Widgets** pane.

> **Note:**
>
> - You can configure more than one **Custom Widget**.
> - You can configure the properties of each widget available for the Home page. For information about configuring the properties of each Widget, see **"Widgets Available for Home Page View on a Mobile Portal" on page 299**.
> - In the **Display Widgets** pane, you can drag and drop the widgets to the required position based on how you want the widgets to be displayed on the Home page.

3. Click **Apply** to apply the view to the Mobile Portal.
4. Click **Save** to save the changes you made to the view.

Click **Preview** to preview the Home Page View on the current Mobile Portal.

Note: Mobile Portals can be previewed with **Chrome** or **Safari** browsers only.

Widgets Available for Home Page View on a Mobile Portal

When you design a Custom Home page view for a Mobile Portal, you can configure the Properties of each Widget to be displayed on the Mobile Portal. Each widget is designed to display specific information that may be useful for the Mobile Portal user.

In the **Custom Views** section, click 

on a Custom View. The widgets available for the Home Page View are listed in the **Available Widgets** pane as shown in the following figure.

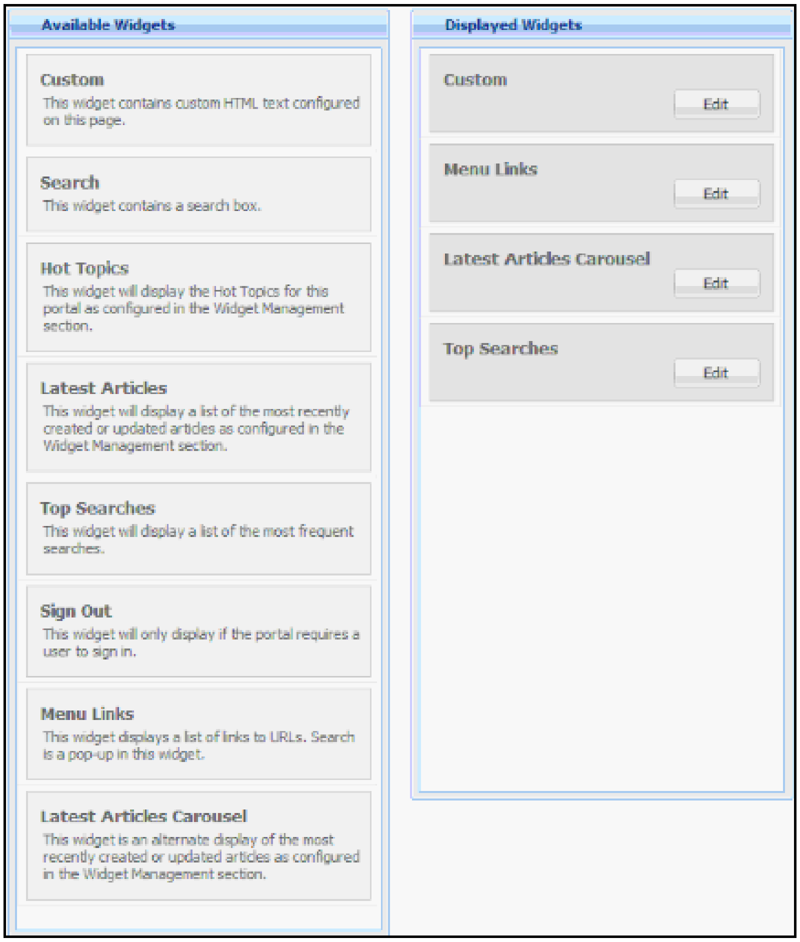


Figure 253 Available Widgets pane

The following table describes the widgets available in the **Available Widgets** pane:

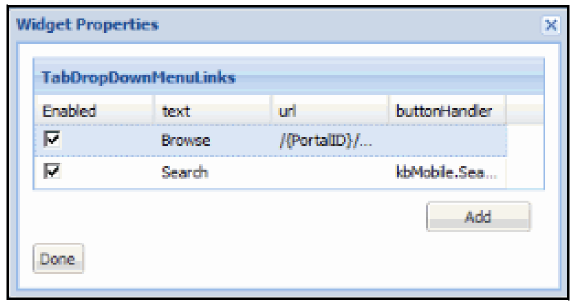
Widget	Description
Custom	You can use this widget to display custom text on the Mobile Portal Home page. For example, you can edit the HTML text for this widget to display your company's banner on the Mobile portal Home page. To configure a Custom widget, follow these steps: 1. Drag and drop the Custom widget from **Available pane** to the **Display pane**. 2. Click **Edit.** The **Widget Properties** page is displayed. 3. In the **HTML Text** section, enter HTML code based on what you want to display in this widget on the Mobile Portal Home page.By default, the HTML needed to display Moxie's logo banner is used. 4. Select the checkbox next to **Show Header** and enter a **Header Text** that you want to display for the widget. 5. Click **Done**.
Search	The **Search widget** displays a search box on the Mobile Portal Home page. You can configure the label displayed on the Search Button of this widget. To configure the **Search Button** label, follow these steps: 1. Drag and drop the widget from **Available Widgets pane** to **Display Widgets pane**. 2. Click **Edit** on the Search Widget. The **Widgets Properties** page is displayed. 3. In **Search Button Text** field enter a name for the search button. 4. Click **Done**.

Widget	Description
Hot Topics	The **Hot Topics** widget displays the Hot Topics for the Mobile Portal as configured in the **Widget Management** section. The **Hot Topics** widget lists the most viewed Articles on the Home page of a Mobile Portal. You can configure the Hot Topics widget to display the number of Articles to be listed and configure the widget to be displayed in collapsed form. To edit the Hot Topics widget, carry out these steps: 1. Drag and drop the widget from **Available pane** to **Display pane**. 2. Click **Edit** on the Hot Topics Widget. The Widget Properties page is displayed. 3. From dropdown list for **Numberof Items**, select the number of Articles to be listed in the Mobile Portal. **Note**: If the **NumberofItems** value you specify is greater than the value configured for the Customer Portal, the Hot Topics widget on the Mobile Portal will list items based on the number configured for the Customer Portal. 4. Select the checkbox next to **CollapsedByDefault** to display the Hot Topics widget in collapsed form in the Mobile Portal. 5. Click **Done** to complete.
Latest Articles	The Latest Article widget displays the Latest Articles in the Home page of a Mobile Portal.The **Latest Articles** widget lists the most recent and newly created Articles available on the Mobile Portal. You can configure the Latest Articles widget to display the number of Articles to be displayed and you can also configure the widget to be displayed in collapsed form. To edit the Latest Articles widget, carry out these steps: 1. Drag and drop the widget from **Available pane** to **Display pane.** 2. Click **Edit** on the Latest Article Widget. The Widget Properties page is displayed. 3. From dropdown list for **Numberof Items**, select the number of Articles to be listed in the Mobile Portal. **Note**: If the **NumberofItems** value you specify is greater than the value configured for the Customer Portal, the Latest Articles widget on the Mobile Portal will list items based on the number configured for the Customer Portal. 4. Select the checkbox next to **CollapsedByDefault** to display the Hot Topics widget in collapsed form in the Mobile Portal. 5. Click **Done** to complete.

<table>
<tr><th>Widget</th><th>Description</th></tr>
<tr><td>Top Searches</td><td>
The Top Searches Widget displays the Top Searches in the Home page of a Mobile Portal.The Top Searches widget lists the top searches for the Mobile Portal as measured by the number of times a specific search string is submitted.
You can configure the Top Searches widget to display the number of search terms to be listed and configure the widget to be displayed in collapsed form.
To edit the Top Searches widget, carry out these steps:

Drag and drop the widget from Available Widgets pane to Display Widgets pane.
Click Edit on the Top Searches Widget. The Widget Properties page is displayed.
From dropdown list for Numberof Items, select the number of Articles to be listed in the Mobile Portal.
Note: If the NumberofItems value you specify is greater than the value configured for the Customer Portal, the Top Searches widget on the Mobile Portal will list items based on the number configured for the Customer Portal.
Select the checkbox next to CollapsedByDefault to display the Hot Topics widget in collapsed form in the Mobile Portal.

Click Done to complete.
</td></tr>
<tr><td>Sign Out</td><td>You can use the Sign Out widget to displays the sign out option on the Mobile Portal.</td></tr>
</table>

Widget	Description
Menu Links	The Menu Links widget displays Menu links to URL's. To configure a link, follow these steps: 1. Drag and drop the widget from **Available Widgets pan**e to **Display Widgets pane**. 2. Click **Edit** on the **Menu Links** widget. The **Widget Properties** page is displayed. The following figure shows the Widget Properties for the Menu Links widget:  **Figure 254 Menu Links Widgets Properties Page** 3. Click **Add** to configure a new button. 4. The new link is displays in the **Menu_Links** pane. By default the check box for the new button added is selected. 5. In the **text** section, enter a name for the link. 6. In the **URL** field, enter the URL for the link or in the **Button Handler** field enter the name of a JavaScript function to be executed when the button is tapped. **Note**: From a best practices perspective, it is recommended that only one of the two options is used for configuring the **Menu Links** in the Widget Properties for Mobile Portal Configuration. 7. Click **Done** to complete.
Latest Article Carousel	You can use this widget as an alternate display of the most recently created or updated articles as configured in the Widget Management section.

Copying a Custom Home Page View

You can copy an existing Custom Home Page View to create a new Custom View.

1. Click 

on the **Custom view** that you want to copy. Enter a new name for the view.
2. Click **Create**.
3. The copied view is listed in the **Custom Views** for Home table.
4. Click 

to apply the copied view to the Mobile Portal.

Applying a Custom Home Page View

When you enable Mobile Portal for Customer Portal, the default Home Page view is automatically applied for the Mobile Portal.

To apply a Custom Home page View to a Mobile Portal, in the **Custom View** for **Home** table, click the 

button that is displayed in the same row as the name of the Custom View you want to apply to the Mobile Portal. The Custom View is applied to that Mobile Portal and the status changes to **Applied** in the Custom Views for Home table.

Deleting a Custom View

You can delete a Custom Home Page view from the Custom Views section. To delete a Custom Home Page view, follow these steps:

1. Click **Delete** on the Custom View that you want to delete. You are prompted to confirm the deletion as shown in the following figure.

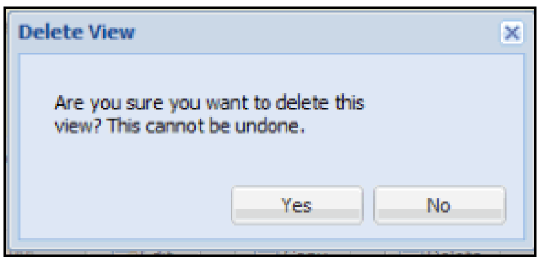


Figure 255 Delete View Window

2. Click **Yes**. The Custom View is deleted.

Click **No** to cancel the operation.

Note:

- You cannot delete the default Home page View.
- You cannot delete a Custom Home page View that is applied to a Mobile Portal.

Configuring a Sign In Page for a Mobile Portal

Mobile Configuration enables you to create and configure Views for the **Sign In** page of the Mobile Portal. Click the **Home** button on the Mobile Configuration page, the Custom Views for Home section is displayed on the page. Click the **Sign In** button, the Custom Views for Sign In table is displayed on the **Mobile Configuration** page.

The following figure shows the Custom Views for Sign In section on the Mobile Configuration page:

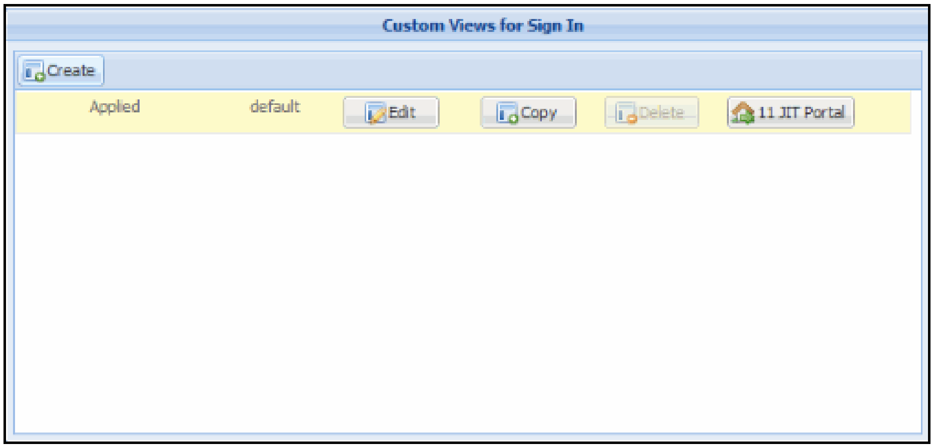


Figure 256 Custom View for Sign In Module

The **Custom Views for Sign In** table enables you to create, copy edit, or delete a Sign In Page view, apply a Sign In page view to the Mobile Portal.

Configuring a Custom Widget for the Sign In Page

1. Click the **Sign In** button on the **Customizable Modules** section. The Custom Views for the Sign In section is displayed.
2. Click Edit next to the name of the View, for which you want to configure the widget.
3. From the **Available Widgets** pane, drag and drop the Custom Widget to the **Displayed Widgets** pane.
4. Click **Edit** in the Custom Widget in the **Displayed Widgets** pane.
5. The **Widget Properties** page is displayed. Enter the HTML content based on what you want to display in the widget with the Sign In page on the Mobile Portal.
6. Click **Done** to complete.

> **Note:**
>
> You can configure as many custom widgets you want for the Sign In page.

Changing Themes for Mobile Portal

The **Change Mobile Theme** option present in the upper right corner of the **Mobile Configuration** page enables you to change the themes of a Mobile Portal.The following figure illustrates the Mobile Theme page:

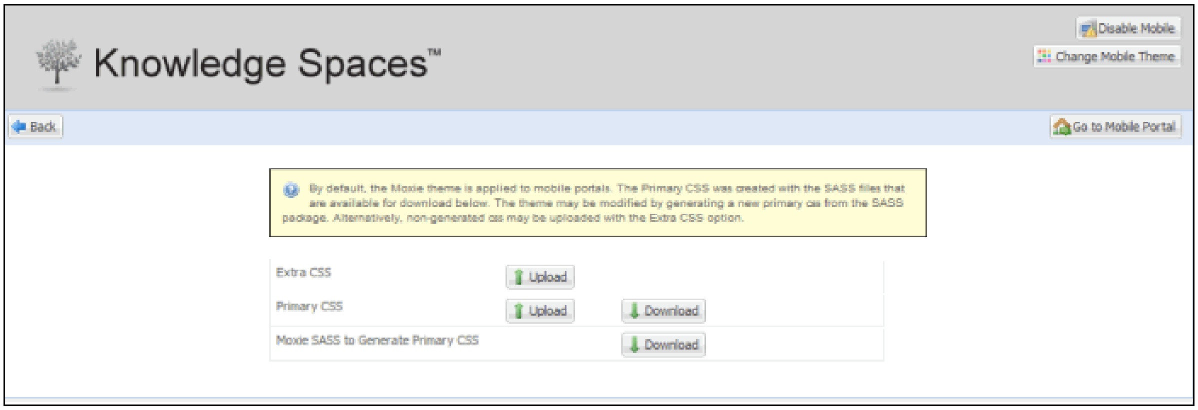


Figure 257 Mobile Theme Page

The following table describes the options available on the **Mobile Theme** page:

Option	Description
Extra CSS	You can use the **Extra CSS** option to upload a CSS file to apply additional styling to the Mobile Portal.
Primary CSS	You can download the Moxie SASS package and create a replacement Primary CSS to be used for the Mobile Portal. Click **Upload** to upload the replacement Primary CSS file. Note: If you have uploaded a customized Primary CSS file the **Restore to Default** button is displayed on the page. Click **Restore to Default** for the Mobile Portal to use the default Primary CSS file. For information about creating a customized Primary CSS file, see **“Creating a customized Primary CSS file” on page 308**.
Moxie SASS to Generate Primary CSS	Click download to save the Moxie SASS package.
Back	Click to navigate back to the Mobile Portal Configuration page.
Go to Mobile Portal	Click to launch the Mobile Portal. This provides a preview of how the Mobile Portal user Interface appears. The **Go to Mobile Portal** option is accessible only when the Mobile Portal is enabled. **Note**: You can preview the Mobile Portal only on Chrome and Safari browser.

Option	Description
Disable Mobile	Click to disable the **Mobile Portal** option for this Customer Portal. You can enable or disable the **Mobile Portal** option for each Customer Portal individually.

Designing a Mobile Portal Theme with Sass and Compass

You can create a customized CSS file for a Mobile Portal using the **Moxie SASS** package. You can download the **Moxie SASS.zip** package from the **Mobile Theme** page. You must install **Ruby** and **Compass** to compile a new CSS file.

Downloading the SASS.zip package

You can download the **SASS.zip** package, from the **Mobile Theme** page.

1. Click 

next to **Moxie SASS to Generate Primary CSS** on the Mobile Theme page.
2. The **SASS.zip** package is downloaded in the default downloads folder configured for your browser.
3. Extract the **SASS.zip** package to an appropriate location.

Compiling a Replacement CSS File

You must compile the customized CSS file before uploading it as a Primary CSS file in the Mobile Theme page. To compile a new CSS file, you must install Ruby and Compass.

Installing Ruby and Compass

You can follow these steps to install Ruby and Compass:

Installing Ruby and Compass on a Windows Operating System computer:

1. Download and install Ruby from http://rubyinstaller.org/
2. To verify Ruby is installed, click on the **Start** menu, point to **All Program,** and then click **Ruby.**
3. Select **Start Command Prompt with Ruby.**
4. Type **ruby -v** in the **Ruby Command Prompt** and press enter. The version number of Ruby installed is displayed.
5. Install **Compass** through the Ruby Gem installer, click on the **Start** menu, point to **All Program,** and then click **Ruby.**
6. Select **Start Command Prompt with Ruby.**
7. Type '**gem install compass**' and press enter. The Compass is installed.

Installing Ruby and Compass on a Mac Computer

Ruby is pre-installed on Apple OS X Leopard and Tiger. To verify Ruby is installed and running correctly,

1. Open the **Applications** folder, select **Utilities,** and then click **Terminal** to open a **Terminal Window**.
2. Type **ruby -v** command and press **Enter** key. The version number of Ruby installed is displayed.
3. If you receive an error, then you must add Ruby to your profile path.
   iv. If Ruby is installed in **/urs/local/bin** path in your computer, open the **.profile** file in the home directory with a text editor.
   v. Add the following line,

      export PATH="/usr/local/bin:$PATH"

vi. Close and re-open the **Terminal Window**

vii. If Ruby is installed in a different location, you must replace **/urs/local/bin** in the **.profile** file with the appropriate path.

4. Once you have verified Ruby is installed, continue to install Compass.
5. Open the **Applications** folder, and select **Utilities,** and then click **Terminal** to open a **Terminal Window**.
6. On the Terminal Window type "**gem install compass**" and press enter.

Using Compass to compile SCSS files into CSS

If you are using Windows Operating System computer to compile the replacement CSS file, follow these steps:

1. Click on the **Start** menu, point to **All Program,** and then click **Ruby.**
2. Select **Start Command Prompt with Ruby.**
3. In the **Ruby Command Prompt**, navigate to the **sass** folder within the SASS.zip extracted directory.
4. Type **compass compile moxie.scss** and press enter. The existing moxie.css file within the **css** folder in the extracted directory will be overwritten with the new compiled file which can be uploaded as Primary CSS file in the Mobile Theme page

If you are using Mac OS X to compile the replacement CSS files, follow these steps:

1. Open the **Applications** folder, and select **Utilities,** and then click **Terminal** to open a **Terminal Window**.
2. In the **Terminal Window**, navigate to the sass folder within the SASS.zip extracted directory.
3. Type **compass compile moxie.scss** and press **Enter key**. The existing moxie.css file within the **css** folder in the extracted directory will be overwritten with the new compiled file which can be uploaded as Primary CSS file in the **Mobile Theme** page.

Creating a customized Primary CSS file

You can generate a Primary CSS file from the exiting moxie.scss file and customize this file accordingly. You can change the color and images for a Mobile Portal.You can access the moxie.scss file by downloading the SASS.zip package. For information on downloading the SASS.zip package, see **"Downloading the SASS.zip package" on page 307**.

Changing the Mobile Color Theme

You can customize the color on for a Mobile Portal theme.

1. In the **SASS.zip** extracted directory, open the **SASS** folder.
2. Open **moxie.scss** in a text editor.
3. You can modify the color of the Mobile Portal theme by changing the $base-color: #ffffff to a hex code. For example, 74bbfb is a hex code for the color blue. Make sure you pre-fix # symbol before the hex code for the color.
4. From the **Ruby Command Prompt** or **Terminal Window** compile the CSS file using **Compass Compiler**. For more information on the Compass compiler, see **"Using Compass to compile SCSS files into CSS" on page 308**.
5. Upload this CSS file to the Mobile Portal as Primary CSS.

> **Note:**
>
> Any time a change is made to the CSS file, you need to recompile the file using the compass compile method. For more information on compiling the css file, see **“CSS Style Sheet” on page 279**, and see **“Using Compass to compile SCSS files into CSS” on page 308**.

Changing the icons for a Mobile Portal

You can modify the icons for a Mobile Portal with icons you would like to be displayed.

1. In the **SASS.zip** extracted directory, open **themes** folder.
2. Navigate to **image\default\pictos** folder
3. You can replace the images in this folder by another image that is 60x60 pixel and replace it with the same image name.

> **Note**
>
> Other Moxie images that you can edit are located in the **theme\images\default\Moxie** path in the folder where you have extracted the SASS.zip.

4. From the **Ruby Command Prompt** or the **Terminal Applicatio**n compile the moxie.scss file to compile the new images into the CSS file. For more information on Compass compile, see **“Using Compass to compile SCSS files into CSS” on page 308**.
5. Upload the **moxie.css** file within the **css** folder in the SASS.zip extracted directory to the Mobile Portal as Primary CSS.

Mobile Portal User Interface

The Home page on the Mobile Portal enables a Portal User to search for contents available in the Mobile Portal. The Mobile Portal Home page is designed as per Custom views configured in the Mobile Configuration for the Customer Portal. The Home page comprises Widgets that display specific information that may be useful to the Portal User. This gives the User a more customized experience. Each widget configured for the Mobile Portal is displayed in a stacked layout. The following figure shows the Mobile Portal Home page:

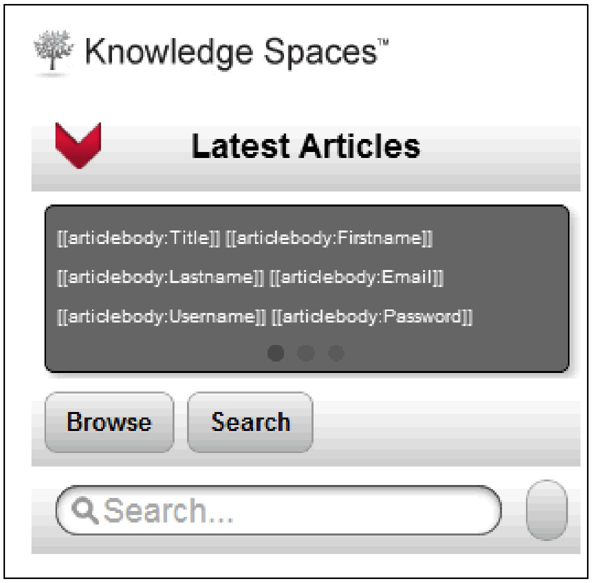


Figure 258 Mobile Portal Home page

Mobile Portal Search Results Page

When a Portal User searches for content on the Mobile Portal Home page, the content from the Portal is searched for and displayed on the Mobile Portal Search Results page.

> **Note:**
>
> The search option on the Mobile Portal can be either configured by select the **Search** widget or by selecting the **Menu Links** widget and configuring search link in the Menu link Widget. For more information on the Mobile Portal widgets, see **"Widgets Available for Home Page View on a Mobile Portal" on page 299**.

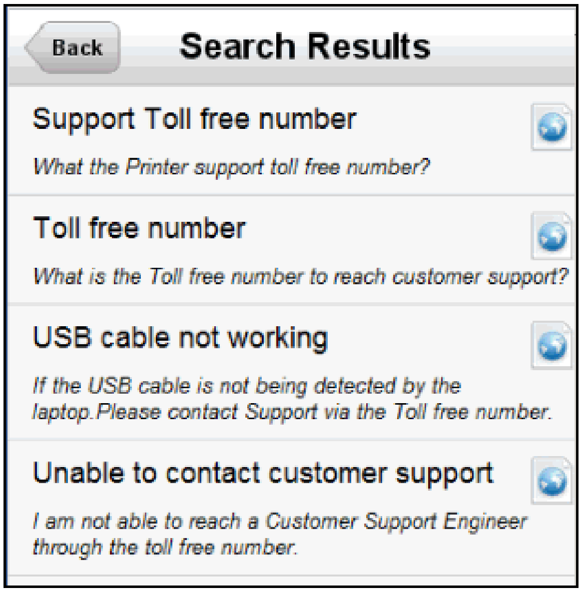


Figure 259 Search Result Page on Mobile Portal

There is a Back option present on the upper left corner of the page, a Portal User can click Back to navigate to the Mobile Portal Home page.

Clicking on an Article link displayed in the Search Results page, displays a brief summary of the Article content on the Mobile Portal. A few Articles can be very long, hence a brief summary from the Search Engine is provided to help you determine if you would like to move onto to read the full article or press Back to select another Article from the Search Results page. The following figure shows an Article Summary page.

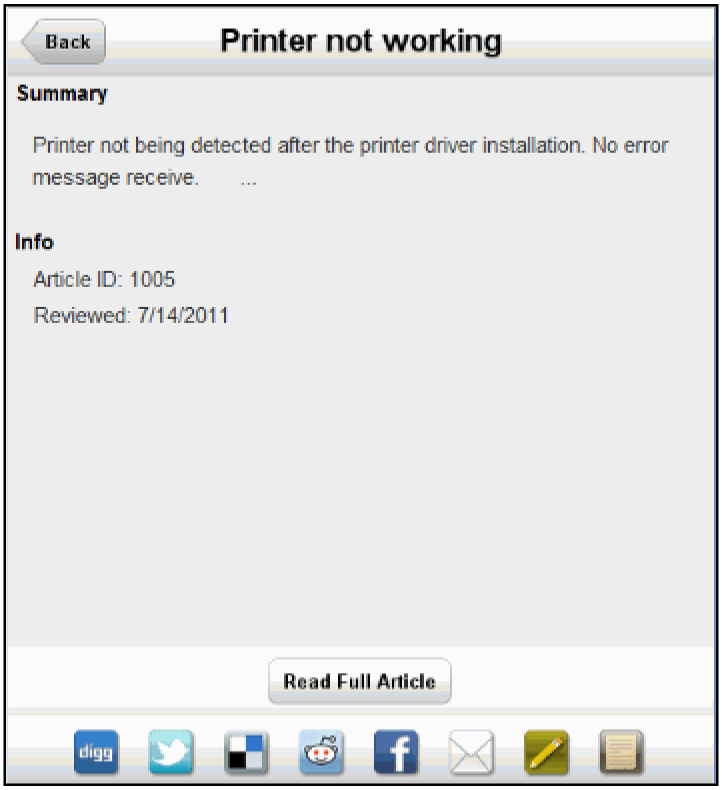


Figure 260 Article View Page

The following table describes the options available in the Article View page:

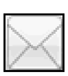
Option	Description
	The Portal User can click this link to navigate back to the search results page.
Read Full Article	The Portal User can click this link to view the full Article.
	The Portal User can click this link to email the Article to an external party.
	The Portal User can click this link to provide feedback about the Article.
	The Portal User can click this link to subscribe for the Article
	The Portal User can click on any of the Social Network links to post the Article on Social Network.

Figure 261 Search box

The Browse Tab

The Browse tab on the Mobile Portal can be configured by selecting the **Menu Links** widget in the **Available Widgets** pane for the Mobile Portal. The **Browse** tab enables a Portal Users to browse through Articles in a Knowledgebase that are grouped under Categories.

The following figure shows the list of Knowledge Base in the Browse tab:

Figure 262 Knowledge Base list in the Browse tab

From the list of Knowledge Bases in the **Browse** tab, a Portal User can click on a Knowledge Base to view the Categories within it. The following figure shows the Categories within a Knowledge Base:

Figure 263 Category within Knowledge Base

Clicking on the Category displays a list of Articles within the Category. The following figure shows a list of Article within the Category:

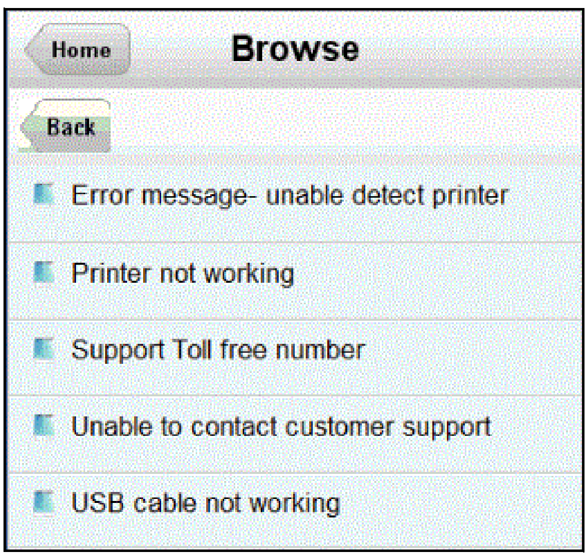


Figure 264 List of Article within the Category

The Portal User can click on the Article link to view the contents of the Article. Following are the options available on the Browse tab:

Option	Description
Home	Click on this link to navigate to the Home page of the Mobile Portal.
Back	Click on this link to navigate to the previous page.

Web Site Integration

Moxie Software™ Knowledge Space provides various ways of integrating Portals, and Portal functionality with numerous other applications. Additionally, Moxie Software™ Knowledge Space often generates the code required for the integration, making it easy for the Administrator. In order to integrate KB functionality into other web sites you must use one of the options from the Web Site Integration area.

On the Portal Home Page, click **Configure** in the **Website Integration** section of the Portal Properties page to view the Website Integration page.

> **Note**
>
> Knowledge Base Portal Users must have JavaScript compatible browsers, to view the Portal in a pop-up window.

Option 1 – Popup Window

The Javascript code is automatically generated. The code is unique to your Portal. If you want to have a popup window, you must paste the Javascript code into the HTML page of your website from where you want to launch the Portal. Subsequently, you can launch the Portal by calling launch Portal();

You must also create a **link** or **button** that will attach to the launch portal command. When a user clicks the link or button, the Portal launches in a separate popup window.

In the same area, you can also specify the default size of the Portal. The portal size is specified in pixels.

Example

Popup Integration Example

```
<script language=javascript>
function launchPortal() {
         winOptions = width=680, height=500,
scrollbars=0, resizable=1, status=0, toolbar=0,
menubar=0, location=0;
         window.open(http://portal.knowledgebase.net/
?cid=26&c=12&cpc=p7W7n74jlAsYigHOg4o3eL700qkPa8RFx7fU7
CM66ibh65I, CP26, winOptions);
         return false;
}
</script>
```

In above example, the Java Script is placed in the head section of an html page and the link can be placed anywhere within the body section of the page.

<A HREF= onclick=return launchPortal();>Click Here

The link can be an image, graphic, or text.

In the above URL the cpid stands for KB Portal Identifier, and the number is the ID of the actual Portal. The cpc is the Portal identifier from the application perspective. The identification value is dynamically generated by the application and is unique to each Portal.

Option 2 - URL Link

If you want to embed the Portal within your Website, or you want to call the URL from any application, select Option 2 to perform this function.

The embedded frame enables integration of the Portal into existing Web content, and it appears as part of the Website, instead of a separate popup window.

Use the HTML code in the **Option 2 – URL** section to access the portal.

Example

http://portal.knowledgebase.net/?cid=26&c=12&cpc=p7W7n74jlAsYigHOg4o3eL700qkPa8RFx7fU7CM66ibh65I

The above code is a standard HTML link. You can place this link anywhere to call the Portal.

cid=26 This is the Portal ID number.

c=12 This is the application account ID.

cpc=p7W7n74jlAsYigHOg4o3eL700qkPa8RFx7fU7CM66ibh65I This is the Portal ID number.

Option 3 – Search Input Box

This option enables you to have a search box in your website that opens the Portal in a separate window and displays the search results from the string entered in the search box. Each Portal has its own unique code for the Search. Use the HTML code in the **Option 3: Search Input Box**:

```
<form action=http://portal.knowledgebase.net/search.asp target=KBsearchWin>
<input type=hidden name=searchtype value=allwords>
<input type=hidden name=searchby value=keywords>
<input type=hidden name=c value=12>
<input type=hidden name=cid value=30>
<input type=hidden name=cpc value=lrTqJ52GHWPVfC1Ld3K2BH6wyngMwt4Ct6c6rYJopfx>
<input type=text name=searchstring>
</form>
```

By placing the above code in any HTML-compliant application, your Portal users can perform the Search.

Code Description:

Search Type: The search type is the type of search that is performed. By default, the code has an input type that is set for all words:

```
<input type=hidden name=searchtype value=allwords>
```

You can easily change the default setting by changing the value to any of the following:

All Words Search	allwords
Any Word Search	anyword
Exact Phrase Search	exactphrase
Boolean Search	boolean

Searchby: The Searchby selects the method of search. By default, the code has an input type that is set for a keyword search.

```
<input type=hidden name=searchby value=keywords>
```

You can easily change the default search method by changing the value to any of the following:

Keyword Search	keywords
Natural Language Query	exactphrase
Article ID Search	articleid

> **Note**
>
> If you select a search method other than keywords for the **Searchby** input type, your selection for **Searchby** overrides the **Searchtype** selection.

Option 4 - Direct Link to Articles

The Direct Link option allows you to directly link from an external application to a specific Article within your KB Portal(s). Direct Links makes it very convenient for the user to view the Article without browsing or searching the portal.

Requirements:

To direct link from an external application to an Article, two criteria must be met. First, your Article must be published, and second, you must create a portal.

Direct Link Module:

This module helps you find the exact URL to link directly to an Article using the portal.

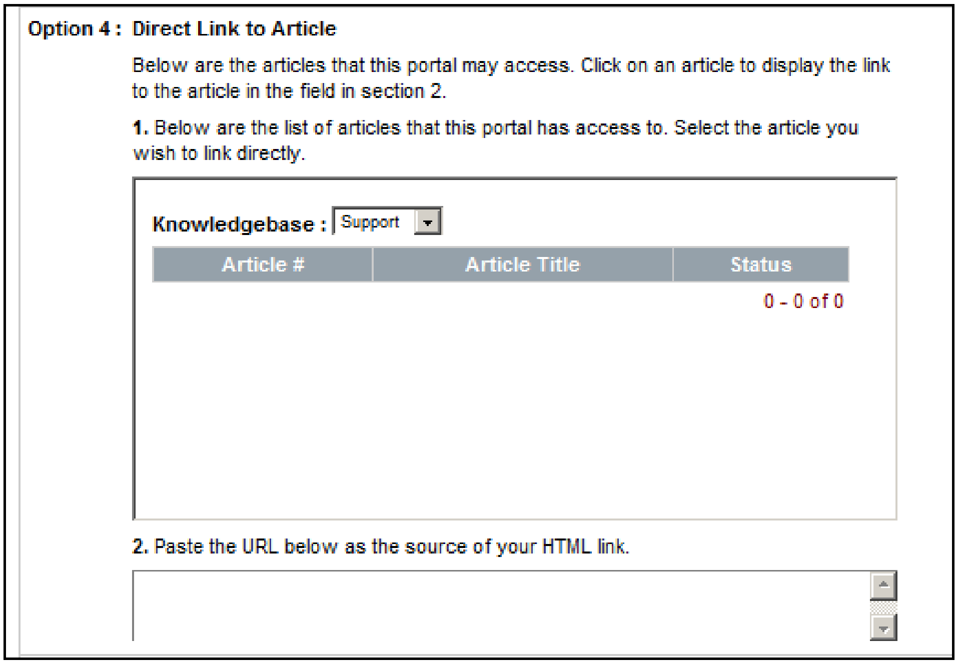


Figure 265 The Option 4: Direct Link to Article Page

This module is located within the Website Integration area of each Portal. To go to the Website Integration area, proceed as follows:

Scroll down to Option 4- Direct Link to Article. Then, by clicking on the Articles that are listed, the Knowledge Spaces™ Administrator automatically generates the exact URL necessary for the Direct Link integration, unique to each Article. You can then place the given URL in other applications, websites, or intranets to link directly to that Article, within the Portal.

Example

http://portal.knowledgebase.net/article.asp?article=1167&p=26

The above URL is generated by Knowledge Spaces Administrator for Article number 1167, located in portal number 26.

article=1167

This is the Article number.

P=26

This identifies the Portal through which this Article is to be accessed.

Below is an example of a direct link to an Article that is built for an html page, using an image as the link to a specific Article.

<a

href=”http://portal.knowledgebase.net/article.asp?article=167&p=26” target=new><img src=/images1.jpg>

Option 5 - Direct Link to Category

The Direct Link option enables you to directly link from an external application to a specific category within your KB Portal(s). Direct Links makes it very convenient for the user to view the category contents without browsing or searching the Portal.

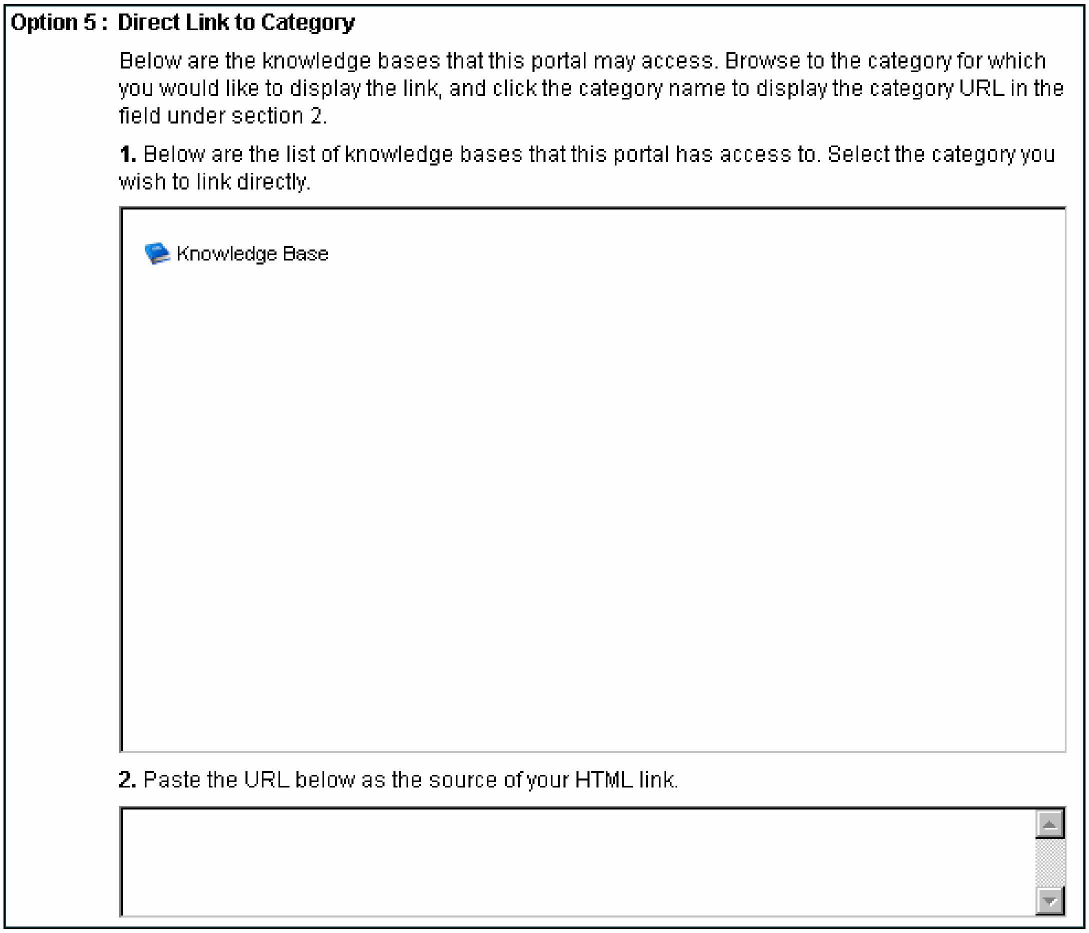


Figure 266 Option 5: Direct Link to Category Section

Option 6 - Direct Link to Module URL

Within the Website Integration section, Option 6 describes how to link directly to a specific module within the Portal. For example, you can link directly to the FAQ module of your Portal, or the Solution Finder section of the Portal. Sample URLs are given in the figure below to guide you.

Figure 267 Option 6: Module URL Section

Widget Management

The Widget Management section enables you to configure the display of widgets in various tabs on the Portal. Each widget on the Portal is designed to display specific information that may be useful to the Portal user.

> **Note**
>
> The Widget Management feature is not available for Portals created using **Portal Style 1**, **Portal Style 2**, or **Portal Style3**.

Portal Widgets

On the **Portal Widgets** page, click **Configure**, the **Widget Management** page is displayed.

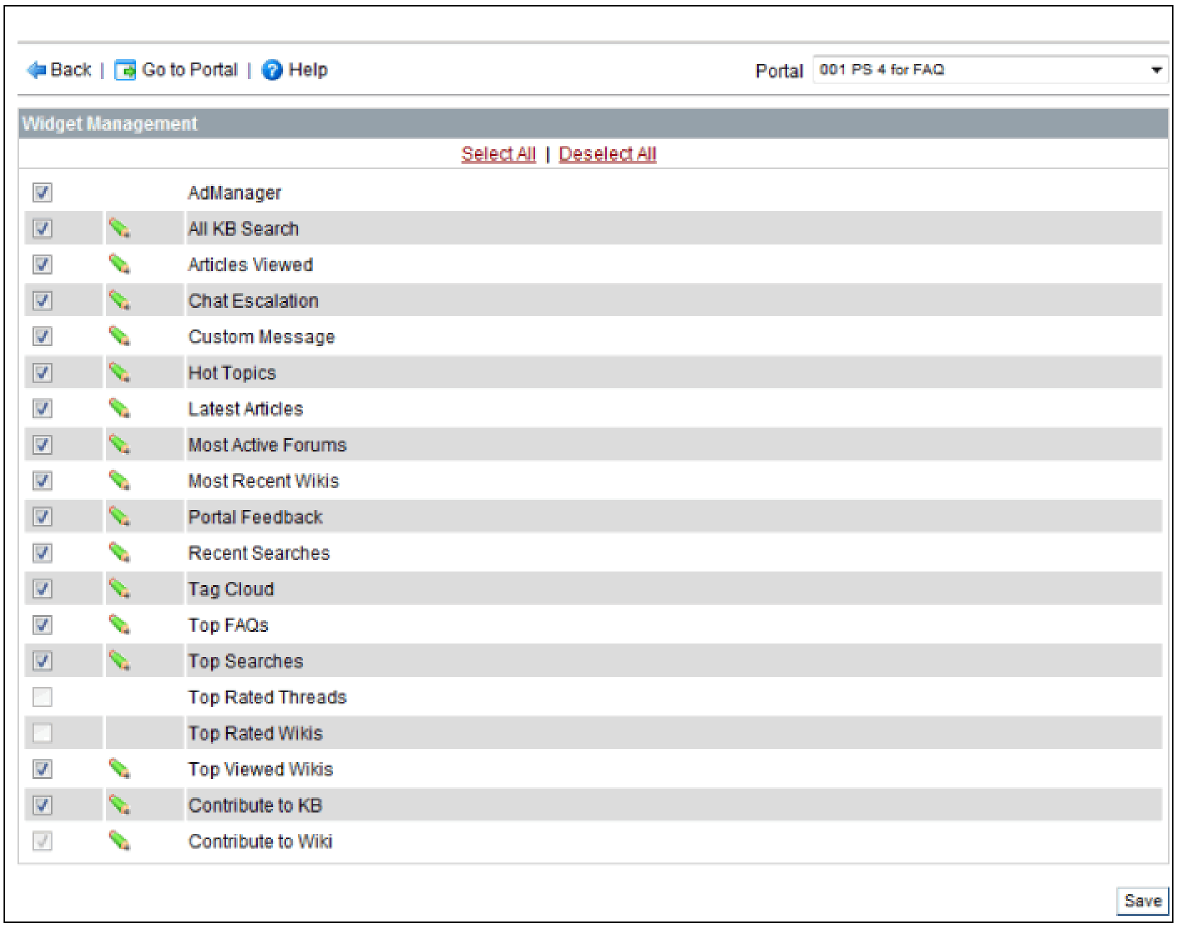


Figure 268 Portal Widget Page

The following table describes the options available on the Widget Management page:

Options	Descriptions
AdManager	Select this option to display the **AdManager** widget in the Search Results page on the Portal. The **AdManager** widget displays active Advertisements available on the Portal.
All KB Search	Select this option to display the **All KB Search** widget in the Home tab on the Portal. The **All KB Search** widget enables the customer to search for Articles on the Portal. **Note**: You can edit the **Title**, **Content**, and **Button Text** displayed in the Widget. Select the **All KB Search** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the **Title**, **Content Text**, and **Button Text** as required, and click **Save**.
Articles Viewed	Select this option to display the Articles Viewed widget in the Article Search Results page on the Portal. The **Articles Viewed** widget lists the most recent Articles viewed during a user session. **Note**: You can customize the name of the widget. Select the **Articles Viewed** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the Widget as required. and click **Save**.
Chat Escalation	Select this option to display the **Chat Escalation** widget in the Home tab on the Portal. This Widget can be used for seamless escalation of users from Self Service to Assisted Service. This is a custom Widget in that the content presented is completely under the Administrator’s control. **Note**: You can customize the name of the widget, and specify regular text or HTML commands to generate the content to be displayed in the Widget. Select the **Chat Escalation** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the Widget as required, and in the **Enter Custom Script** field, specify the content to be displayed in the widget. Click **Save**.

<table>
<tr><th>Options</th><th>Descriptions</th></tr>
<tr><td>Custom Message</td><td>Select this option to display the Custom Message widget in the Home tab on the portal.

This widget enables you to configure a custom message that you want to display on the Portal.

Note: You can edit the Title, and the message to be displayed in the widget on the Portal.

Select the Custom Message option, and click the icon that is displayed. The Edit Widget page is displayed. Change the Title, and Custom Message as required, and click Save.</td></tr>
<tr><td>Hot Topics</td><td>Select this option to display the Hot Topics widget in the Home page on the portal.

The Hot Topics widget lists the most viewed Articles on the Portal. The Portal user can click an Article link listed in the widget to view its content.

Note: You can customize the name of the widget, and configure the number of Articles to be displayed in the widget and the date range for the Articles to be listed.

To edit the Hot Topics widget, carry out the following steps:

1. Select the Hot Topics option, and click the icon that is displayed. The Edit Widget page is displayed.
2. In the Title field, enter the title you want to configure for the widget.
3. In the Number of days list, select the date range for the Articles to be listed in the widget. For example, to list Hot Topics of only the last 20 days, merely select 20 from the list.
4. In the Number of Topics displayed list, select the number of Articles to be displayed in the widget.
5. Click Save.</td></tr>
</table>

Options	Descriptions
Latest Articles	Select this option to display the **Latest Articles** widget in the Home tab on the Portal. **You can configure the Latest Articles widget to display only the newly created Articles available on the Portal or to list both the newly created Articles and most recent Articles available on the Portal**. The Portal user can click an **Article** link listed in the widget to view its content. **Note**: You can customize the name of the widget, and configure the number of Articles to be displayed in the widget and the date range for the Articles to be displayed. To edit the Latest Articles widget, carry out the following steps: 1. Select the **Latest Articles** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, specify the title you want to configure for the widget. 3. In the **Number Items** list, select the number of Articles to be listed in the widget. 4. In the **Date Range** list, select the date range for the Articles to be listed in the widget. For example, to list Latest Articles of only the last 20 days, merely select 20 from the list. **5. In the Filter By list, select the First Published Version option for the Widget on the Portal to list only the newly created Articles available on the Portal.** **- Or -** **Select the Latest Published Version option for the Widget on the Portal to list both the newly created Articles and the most recent Articles available on the Portal.** 6. Click **Save**.
Most Active Forums	Select this option to display the **Most Active Forums** widget in the Forums tab on the Portal. The **Most Active Forums** widget lists the most active Forum Threads, and displays the number of Posts for each listed Thread. **Note**: You can customize the name of the widget. Select the **Most Active Forums** option, and click the icon that is displayed. The **Edit Widget** page is displayed. Change the title of the widget as required, and click **Save**.

Options	Descriptions
Most Recent Wikis	Select this option to display the **Most Recent Wikis** widget in the Wiki tab on the Portal. The **Most Recent Wikis** widget lists the most recent Wiki Articles created on the Portal. **Note**: You can customize the name of the widget. Select the **Most Recent Wikis** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.
Portal Feedback	Select this option to display the **Portal Feedback** widget in the Home tab on the Portal. The **Portal Feedback** link in the **Portal Feedback** widget enables the Portal users to provide feedback about their experience on the Portal. When the Portal User clicks the **Portal Feedback** link, the Knowledge Base Site Feedback page is displayed. The Portal User can provide feedback and also, give suggestions on how to improve the Portal. **Note**: You can edit the **Title**, **Content**, and **Button Text** displayed in the Widget. Select the **Portal Feedback** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the **Title**, **Content Text**, and **Button Text** as required, and click **Save**.
Recent Searches	Select this option to display the **Recent Searches** widget in the Article Search Results page on the Portal. The **Recent Searches** widget displays the most recent search strings used in a user session. **Note**: You can customize the name of the widget. Select the **Recent Searches** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the Widget as required and click **Save**.

Options	Descriptions
Tag Cloud	Select this option to display the **Tag Cloud** widget in the Wikis tab on the Portal. The **Tag Cloud** widget lists the top tags applied to Wikis on the Portal. **Note**: You can customize the name of the widget, and configure the number of tags to be listed in the widget and the date range for the tags to be listed. To edit the Tag Cloud widget, carry out the following steps: 1. Select the **Tag Cloud** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, enter the title you want to configure for the widget. 3. In the **Number Items** list, select the number of tags to be listed in the widget. 4. In the **Date Range** list, select the date range for the tags to be listed in the widget. For example, to list Tags from only the last 20 days, merely select 20 from the list. 5. Click **Save**.
Top FAQs	Select this option to display the **Top FAQs** widget in the **Home** tab on the Portal. The **Top FAQs** widget displays the top Frequently Asked Questions (FAQs) on the Portal as measured by times viewed. **Note**: You can customize the name of the widget, and configure the number of FAQs to be listed in the widget and the date range for the FAQs to be displayed. To edit the Top FAQs widget, carry out the following steps: 1. Select the **Top FAQs** option, and click the icon that is displayed. The Edit Widget page is displayed. 2. In the **Title** field, enter the title you want to configure for the widget. 3. In the **Number Items** list, select the number of FAQs to be listed in the widget. 4. In the **Date Range** list, select the date range for the FAQs to be listed in the widget. For example, to list Top FAQs of only the last 20 days, merely select 20 from the list. 5. Click **Save**.

Options	Descriptions
Top Searches	Select this option to display the **Top Searches** widget in the Home tab on the Portal. The Top Searches widget lists the top searches for the Portal as measured by the number of times a string is submitted. **Note**: You can customize the name of the widget, and configure the number of top search strings to be listed in the widget and the date range for the top search strings to be listed. To edit the Top Searches widget, carry out the following steps: 1. Select the **Top Searches** option, and click the icon that is displayed. The **Edit Widget** page is displayed. 2. In the **Title** field, enter the title you want to configure for the widget. 3. In the **Number Items** list, select the number of top search strings to be listed in the widget. 4. In the **Date Range** list, select the date range for the top search strings to be listed in the widget. For example, to list Top Searches of only the last 20 days, merely select 20 from the list. 5. Click **Save**.
Top Rated Threads	Select this option to display the **Top Rated Threads** widget in the Forum tab on the Portal. The **Top Rated Threads** widget on the Portal displays the top rated Forum Threads as measured by average Post ratings. **Note**: You can customize the name of the widget. Select the **Top Rated Threads** option, and click the icon that is displayed. The **Edit Widget** page is displayed. Change the title of the widget as required and click **Save**.
Top Rated Wikis	Select this option to display the **Top Rated Wikis** widget in the Wiki tab on the Portal. The **Top Rated Wikis** widget on the Portal displays the top rated Wiki Articles as measured by average Wiki ratings. **Note**: You can customize the name of the widget. Select the **Top Rated Wikis** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.

Options	Descriptions
Top Viewed Wikis	Select this option to display the **Top Viewed Wikis** widget in the Wiki tab on the portal. The **Top Viewed Wikis** widget lists the most viewed Wiki Articles on the Portal. **Note**: You can customize the name of the widget. Select the **Top Viewed Wikis** option, and click the icon that is displayed. The Edit Widget page is displayed. Change the title of the widget as required and click **Save**.
Contribute to KB	Select this option to display the **Contribute to KB** widget in the Home page on the Portal. The **Contribute to KB** widget enables a Portal User to contribute to the KnowledgeBase, Wikis and Forums on the Portal. To edit the Contribute to KB widget, carry out the following steps: 1. Select the **Contribute to KB** option, and click the icon that is displayed. The **Edit Widget** page is displayed. 2. In the **Title** field, enter the title you want to configure for the widget. 3. In the **Content Text** field, enter the text you want to display in the widget. 4. In the **Button Text** field, enter the label you want to assign to the button displayed in the widget. When the Portal User clicks the Button in the widget, a New page with **Knowledgebase**, **Forum** and **Wiki** sections is displayed. You can customize the displays of these sections as required. 5. Click **Save**.
Contribute to Wiki	Select this option to display the **Contribute to Wiki** widget in the Wiki page on the Portal. This Widget offers users the ability to Write a Wiki. Users will be required to Login prior to authoring. To edit the Contribute to Wiki widget, carry out the following steps: 1. Click the icon that is displayed to the left of the Contribute to Wiki option. The **Edit Widget** page is displayed. 2. In the **Title** field, enter the title you want to configure for the widget. 3. In the **Content Text** field, enter the text you want to display in the widget. 4. In the **Button Text** field, enter the label you want to assign to the button displayed in the widget. 5. Click **Save**.
Select All	Click to select all the widget options on the page.

Options	Descriptions
Deselect All	Click to deselect the widget options selected on the page.
Save	Click to save the changes made on the Widget Management page.

Note

You can hide the title of a Widget just by removing the Title on the **Edit Widget** page.

To configure the display of widgets for a Portal, carry out the following steps:

1. On the **Widget Management** page of a Portal, click **Configure** in the **Widget Management** section.
   The **Widget Management** page is displayed.
2. Select the appropriate check box(es) based on the widget(s) you want to display on the Portal.
3. Click the **Select All** option to select all the widgets on the Widget Management page.

Note

You can click the **Deselect All** option to deselect the widgets selected on the page.

4. Click **Save**.The Settings Saved message is displayed.
5. Click **OK**. The selected widgets are configured to be displayed on the Portal.

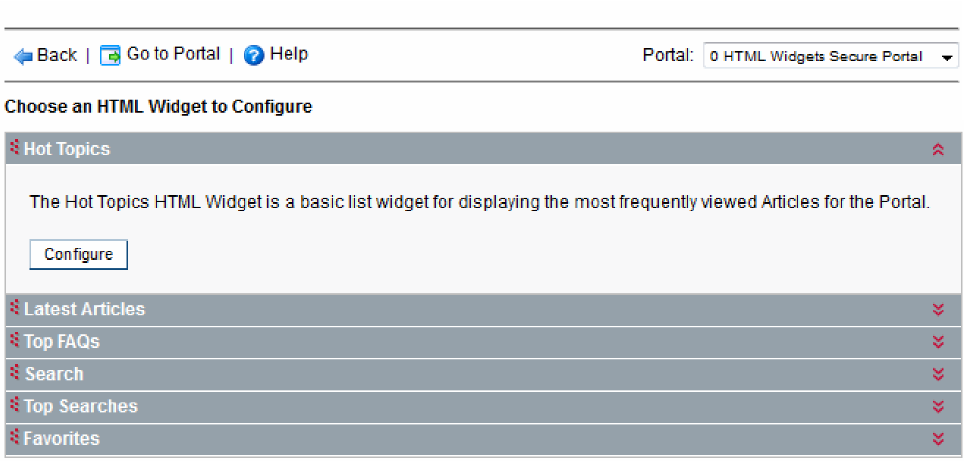
HTML Widgets

HTML Widgets enables the administrator to configure, preview, and download HTML Widget packages based on the input parameters. Currently, HTML widgets are available only for Open Portal Style #4.

HTML Widgets consist of the following options:

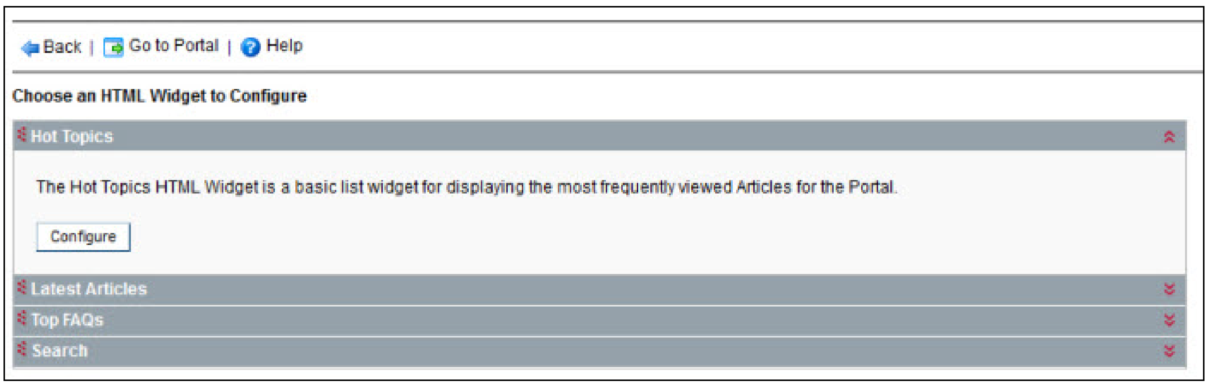
- Hot Topics - Allows you to configure and view the most frequently visited articles.
- Latest Articles - Allows you to configure and view the most recently published or updated articles.
- Top FAQs - Allows you to configure and view the most frequently visited FAQs.
- Search - Allows you to configure and view the elements of a search experience such as pinned articles, enhanced numeric search results, recommended articles, and search results. **Search** Filters

  This is an update to the existing functionality. Filters for the *Search* widget include: Article Group, Category, Attribute, and Language input parameters.
- Favorites and Community Favorites - Allows you to configure to enable users to access frequently-read articles as ***Favorites*** (on a Secure or Personalized portal) or as **Community Favorites** (on an Open portal)
- Top Searches - Allows you to configure and to allow users to get a list of *Top Searches* over a specified time.



Configuring the Hot Topics HTML Widget

1. In the **HTML Widget Configuration** page, click **Hot Topics**. The **Hot Topics** section is displayed.



2. Click **Configure**. The **Hot Topics Widget Configuration** page is displayed

The following table describes the parameters in the Hot Topics Widget Configuration page:

Field	Description
REST Request URL	Displays the REST Request URL. This URL points to the location of the Hot Topics. This field is read-only.
Number of Items	Input parameter that defines the number of articles to be returned and displayed by the Hot Topics widget. The number must be between 1 and 50. By default, the number of items to display is 10. For example, a value of 10 will return 10 most frequently viewed articles in the Portal or through widgets or API within the date range defined in the Number of Days.
Number of Days	Input parameter that specifies the number of days backward from the widget's run-time date. For example, a value of 30 will include articles available to the portal that have been published or updated within 30 days of the date at run-time. Items are in descending order.
Widget Preview	Displays the latest hot topics based on the search configuration results. The Widget Preview is modified when the **Update** button is clicked

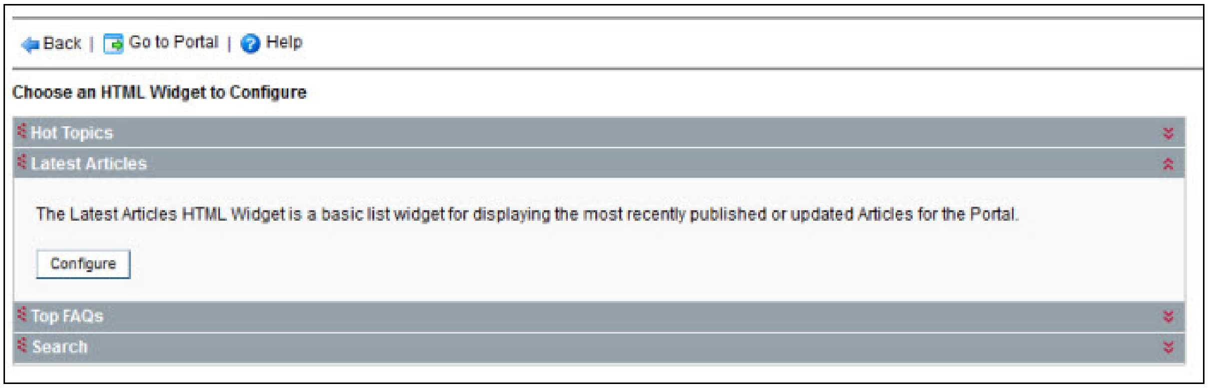
3. Click **Update** to save the input parameters.
4. Click **Download Widget Package** to download the Hot Topics widget package to your preferred location on your computer.

   The Hot Topics Widget package consists of the following files that can be modified:

- HotTopicswidget.html
- HotTopics.js
- HotTopics.css
- kbcommonstyles.css
- kbcommon.js
- jQuery.tmpl.js
- jquery-1.6.2.min.js
- jquery-ui-1.8.22.min.js
- json2.js

Configuring the Latest Articles HTML Widget

1. In the **HTML Widget Configuration** page, click **Latest Articles**. The **Latest Articles** section is displayed.



2. Click **Configure**. The **Latest Articles Widget Configuration** page is displayed.

The following table describes the parameters in the Latest Articles Widget Configuration page

Field	Description
REST Request URL	Displays the REST Request URL. This URL points to the location of the Latest Article. This field is read-only.
Number of Items	Input parameter that defines the number of articles to be returned and displayed by the Latest Article widget. The number must be between 1 and 50. By default, the number of items to display is 10. For example, a value of 10 will return 10 most recent newly created Articles within the Knowledge Spaces for which you have User Group access.

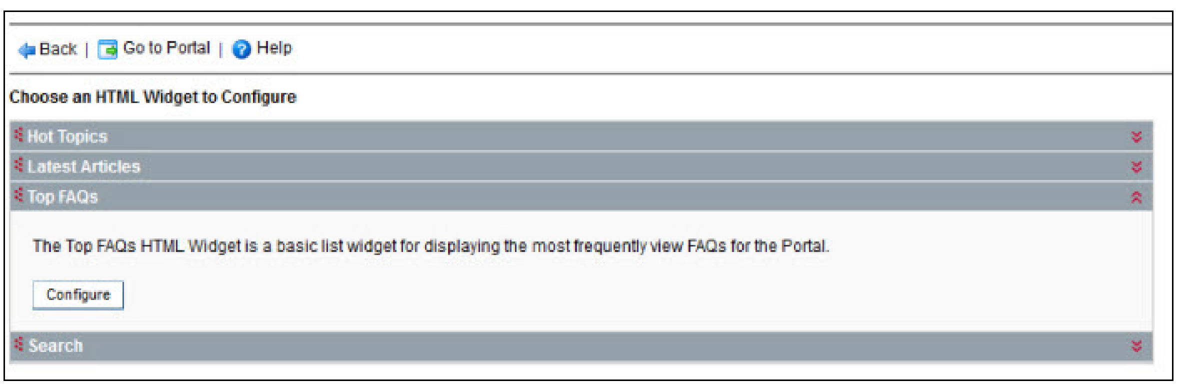
Field	Description
Number of Days	Input parameter that specifies the number of days backward from the widget's run-time date. For example, a value of 30 will include articles available to the portal that have been published or updated within 30 days of the date at run-time. Items are in descending order.
Widget Preview	Displays the latest articles based on the search configuration results. The Widget Preview is modified when the Update button is clicked.

3. Click **Update** to save the input parameters.
4. Click **Download Widget Package** to download the Latest Articles widget package to your preferred location on your computer.

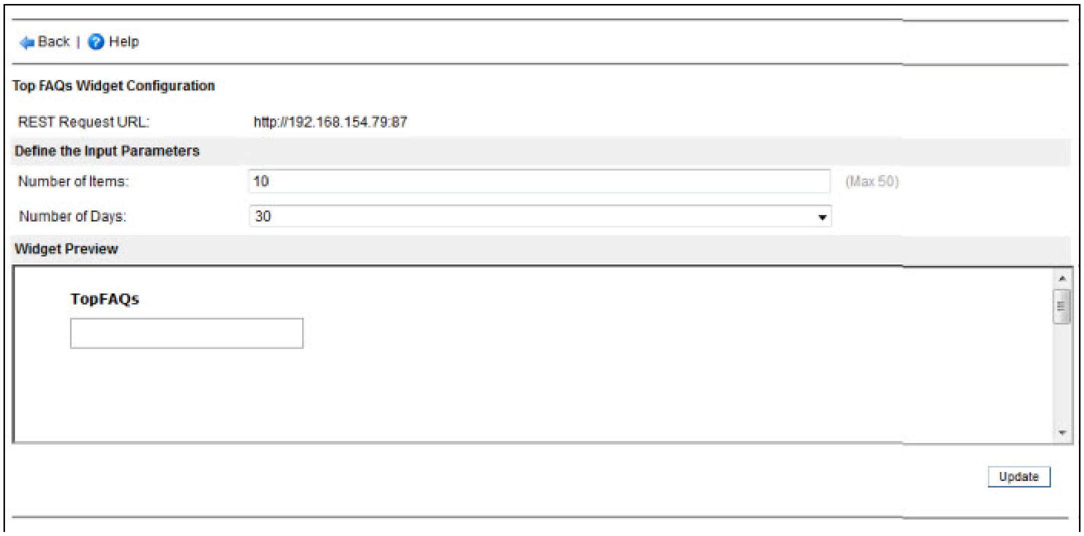
- The Latest Articles Widget package consists of the following files that can be modified:
- jquery-1.6.2.min.jsLatestArticleswidget.html
- LatestArticles.js
- LatestArticles.css
- kbcommonstyles.css
- kbcommon.js
- jQuery.tmpl.js
- jquery-ui-1.8.22.min.js
- json2.js

Configuring the Top FAQs HTML Widget

1. In the HTML Widget Configuration page, click **Top FAQs**. The **Top FAQs** section is displayed.



2. Click **Configure**. The **Top FAQs Widget Configuration** page is displayed.



The following table describes the parameters in the Top FAQs Widget Configuration page

Field	Description
REST Request URL	Displays the REST Request URL. This URL points to the location of the Top FAQs. This field is read-only
Number of Items	Input parameter that defines the number of items to be returned and displayed by the Top FAQs widget. The number must be between 1 and 50. By default, the number of items to display is 10. For example, a value of 10 will return 10 most frequently viewed articles in the Portal or through widgets or API within the date range defined in the **Number of Days**
Number of Days	Input parameter that specifies the number of days backward from the widget's run-time date. For example, a value of 30 will include most frequently viewed FAQs in the Portal. Items are in descending order.
Widget Preview	Displays the Top FAQs based on the search configuration results. The Widget Preview is modified when the **Update** button is clicked.

3. Click **Update** to save the input parameters.
4. Click **Download Widget Package** to download the Top FAQs widget package to your preferred location on your computer.

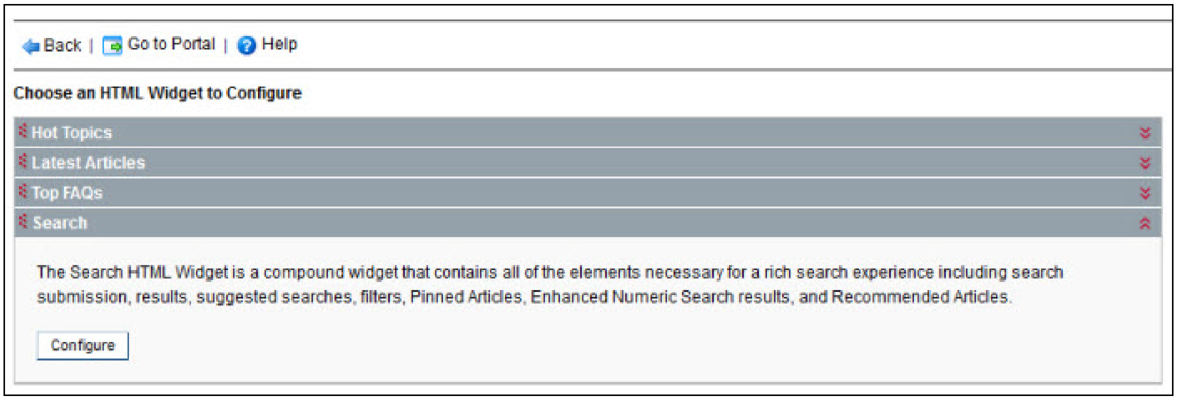
   The Top FAQs package consists of the following files that can be modified:

   - TopFaqswidget.html
   - TopFaqs.js
   - TopFaqs.css
   - kbcommonstyles.css
   - kbcommon.js

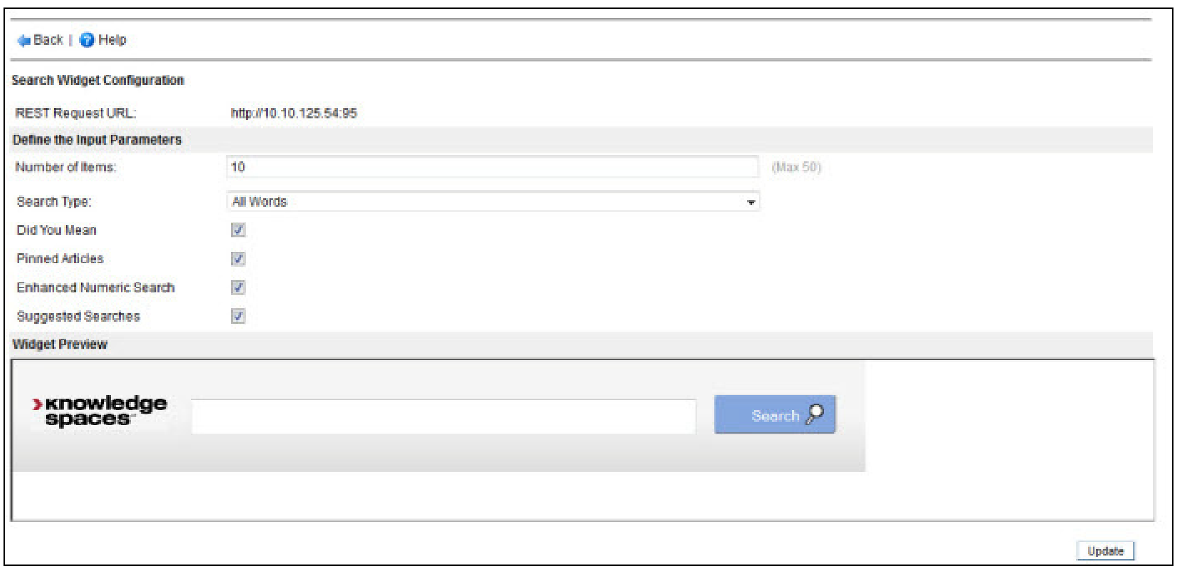
- jQuery.tmpl.js
- jquery-1.6.2.min.js
- jquery-ui-1.8.22.min.js
- json2.js

Configuring the Search HTML Widget

1. In the HTML Widget Configuration page, click **Search**. The Search section is displayed.



2. Click **Configure**. The Search Widget Configuration page is displayed



The following table describes the parameters in the Search Widget Configuration page.

Field	**Description**
REST Request URL	Displays the REST Request URL. This URL points to the location of the search widget. This field is read-only.

Field	Description
Number of Items	Input parameter that defines the number of items to be returned and displayed by the search widget. The number must be between 1 and 50. By default, the number of items to display is 10.
Search Type	Provides a list of search criteria for Article Search.
Did You Mean	Determines whether the autonomy spell check suggestions are included for display in the search widget.
Pinned Articles	Determines whether Knowledge Spaces Pinned Articles are included for display in the search widget
Enhanced Numeric Search	Determines whether Knowledge Spaces Enhanced Numeric Searches are included for display in the search widget.
Suggested Searches	Determines whether Autonomy Suggested Searches are included for display in the search widget
Widget Preview	Displays the latest articles based on the search configuration results. The Widget Preview is modified when the **Update** button is clicked.

3. Click **Update** to save the input parameters.
4. Click **Download Widget** Package to download the Search Widget package to your preferred location on your computer.

- The Search Widget package consists of the following files that can be modified:
- Searchwidget.html
- Search.js
- Search.css
- kbcommonstyles.css
- kbcommon.js
- jQuery.tmpl.js
- jquery-1.6.2.min.js
- jquery-ui-1.8.22.min.js
- json2.js
- moxielogo.png
- search-icon.png
- search-icon-2.png

Reputation and Rating Management

This section enables you to configure the Rating and Reputation features for the Portal. You can enable the Rating and Reputation features, and define Reputation levels to represent the contribution of the Portal Users to Forums and Wikis on the Portal.

On the Portal Modules page, click **Configure** in the **Reputation and Rating Management** section. The Reputation and Rating Management page is displayed.

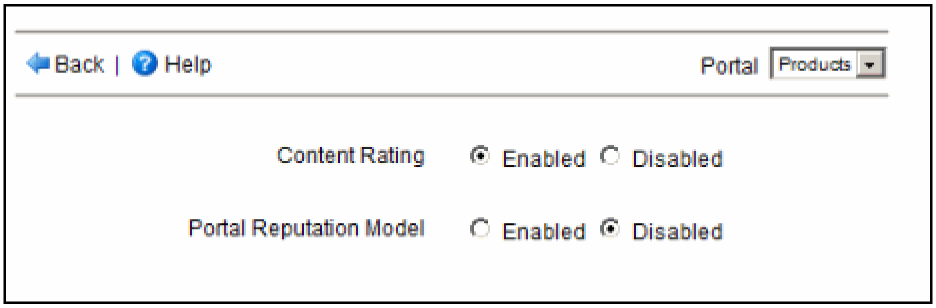


Figure 269 Reputation and Rating Main Page

You can enable or disable the Rating and Reputation features and, click the **Manage Reputation** button to define Reputation levels.

In the **Reputation and Rating Management** page, click the appropriate button to enable/disable Content Rating, and Portal Reputation Model for the Portal.

Managing Reputations

This section enables you to define Reputation Levels to represent the contributions of the Community members on the Portal. Reputation Management enables you to set standards for Community members to promote them to the next Level. Promotions happen automatically when a Community member meets or exceeds all standards set for a Level. A Community member can ascend to the next Level only after achieving all the standards set for the Level.

Note:

The **Portal Reputation** option must be enabled on the Reputation and Rating Management page, to define Reputation levels.

On the **Reputation and Rating Management** page, click the **Manage Reputation** button. The Manage Reputations page is displayed.

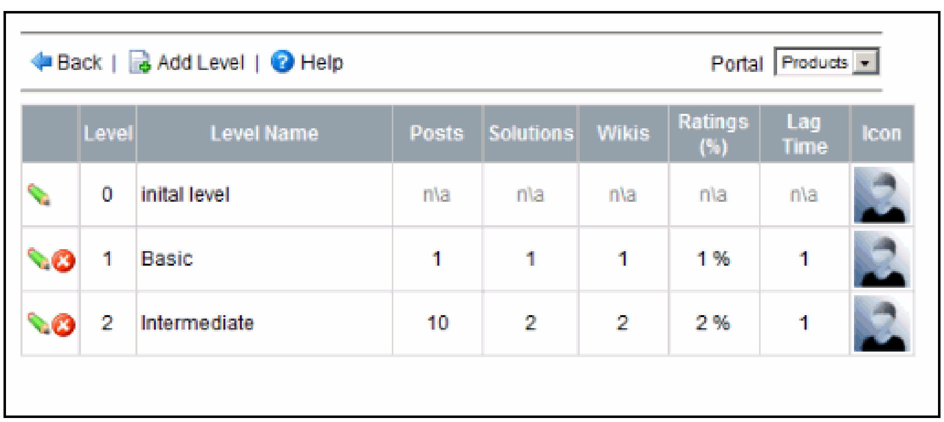


Figure 270 Manage Reputations Page

The following table describes the options available in the Manage Reputations page:

Option	Description
Level	A simple numeric indicator meant to illustrate Reputation Levels in ascending order.
Level Name	This column displays the names of the Reputation Levels defined for the Portal.
Post	The minimum number of Forum Posts a Community member must submit to attain the Level. **Note:** The Posts count include the new Posts and Quotes submitted by the Community member.
Solution	The minimum number of Forum Posts from the Community member, that must be accepted as Solutions.
Wikis	The minimum number of Wikis the Community member must create to achieve the Level. **Note:** The Wikis count includes new Wikis, and Wiki Edits .
Ratings(%)	Required average Ratings of a Community member's contributions. A positive rating has a value of **1**, and a negative rating has a value of **0**. A Community member's average rating is calculated as follows: Sum of Total positive rating (Forum Post rating values + Wiki rating values) / Count (Forum Post ratings + Wiki ratings)
Lag Time	Maximum average number of days allowed between a user's contribution to Forums or Wikis. **Note**: The Lag Time field accepts values between 1 and 3650 only. If you specify a value out of this range, the **Save** button gets disabled.
Icon	Displays the icons used to represent the Levels on the Portal.
Add Level	Click to define a new Reputation level for the Portal User.

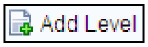
Defining a Reputation Level

You can define Reputation levels to represent the contributions of users on the Portal. The Forum Thread page on the KB Portal displays the Reputation Level for each User who posts a Thread within the Forum. By default, no Levels are defined on the Reputation Management page. However, when the first Level is defined, it can not be deleted.

To define a Reputation level, carry out the following steps:

1. On the **Portal** page, click the name of the Portal for which you want to define a Reputation Level. The **Portal Properties** page is displayed.
2. Click **Configure** in the **Reputation and Rating Management** section.

   The Reputation and Rating Management page is displayed.
3. Select the **Enabled** option in the Portal Reputation section.
4. Click the **Manage Reputation** button. The Manage Reputations page is displayed.

5. Click 

 to define a new Reputation level for the Portal.

> **Note:**
>
> For more information about the fields on the page, see **"Managing Reputations" on page 336**.

6. Enter the required values in the fields.
7. A default icon is automatically used to represent the Level on the Portal. You can change the icon with a new icon you want to use to represent the Level. For more information on changing the Reputation Level icon, see **"Changing A Reputation Level Icon" on page 338**.
8. Click **Save**.The new Reputation level is defined for the Portal.

Editing A Reputation Level

1. On the Portal page, click the name of the Portal which contains the Reputation Level you want to modify. The **Portal Properties** page is displayed.
2. Click **Configure** in the **Reputation and Rating Management** section.
3. Click the **Manage Reputation** button. The **Manage Reputations** page is displayed.
4. Click to the left of the Level whose details you want to modify.
5. Edit the required fields.
6. Click **Save**. The Reputation Level is updated with the changes.

Changing A Reputation Level Icon

When a new Level is defined, a default icon is automatically used to represent the Level on the Portal. You can replace the default icon with an icon of your choice.

> **Note**
>
> You must first create a level, and then edit the level and change the icons for a level.

To change the icon used to represent a Reputation Level on the Portal, carry out the following steps:

1. On the **Manage Reputations** page, click to the left of the Reputation level for which you want to change the icon
2. Click the **Change Icon** link next to the icon.The Logo page is displayed.
3. Click **Browse**, and locate the image you want to use to represent the Reputation Level.
4. Click **Save**. The icon is uploaded and is displayed on the Logo page.
5. Click the radio button next to the new icon to select that icon for the Reputation Level.
6. Click **Save**.The Reputation level is associated with the new icon to represent the Level.

Deleting Reputation Level Icons

You can delete a Reputation Level icon that is uploaded in Knowledge Spaces™.

To delete a Reputation Level icon, carry out the following steps:

1. On the **Manage Reputations** page, click to the left of a Reputation Level.
2. Click **Change Icon**.The Logo page is displayed.
3. Select the icon you want to delete.
4. Click Delete Icon. A message prompting you to confirm the deletion of the icon is displayed.

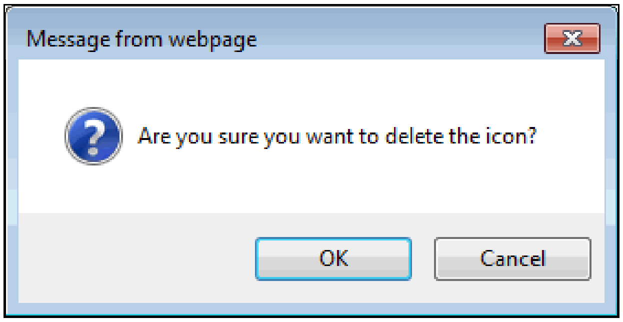


Figure 271 Confirmation Message To Delete An Icon

5. Click **OK**. The Reputation Level icon is deleted.
6. Click **Save**.
7. If the icon that was deleted was associated to the Reputation level, select another icon, or add a new icon.

   To associate an icon to a level see **“Changing A Reputation Level Icon” on page 338**.

Deleting A Reputation Level

1. On the **Portal** page, click the name of the Portal which contains the Reputation Level you want to delete. The Portal Properties page is displayed.
2. Click **Configure** in the **Reputation and Rating Management** section.
3. Click the **Manage Reputation** button. The Manage Reputation page is displayed.
4. Click to the left of the Level you want to delete.

   A warning message is displayed prompting you to confirm the deletion of the Level.

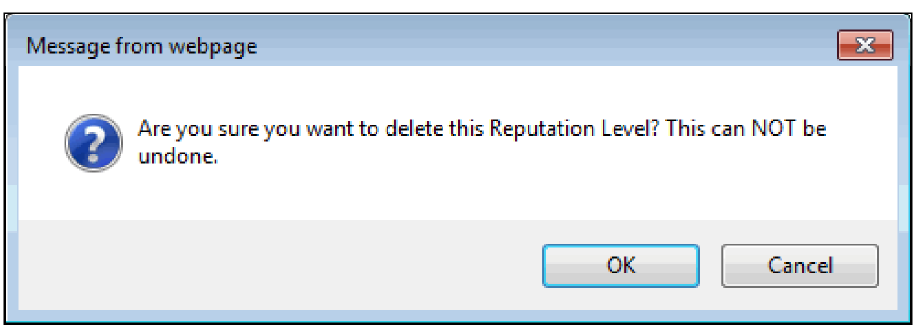


Figure 272 Confirmation Dialog Box To Delete A Level

5. Click **OK**. The selected Level is deleted.

Registration Log

The Registration Log records information about Users who have registered at the Portal.

> **Note:**
>
> You must be granted the **Registration Log** permission to view the list of the Portals that require registration.

If you have a registration required Portal, users accessing the Portal are required to fill a set of data fields before they are granted access to the Portal.

When users fill the data fields and log on to the Portal, the information they submit is stored and available in the Registration Log.

From the **Portal** tab, click the **Registration Log** menu.The Registration Log home page with a list of the Portals that require registration is displayed. Click the Portal name to view the registration data for that particular Portal.

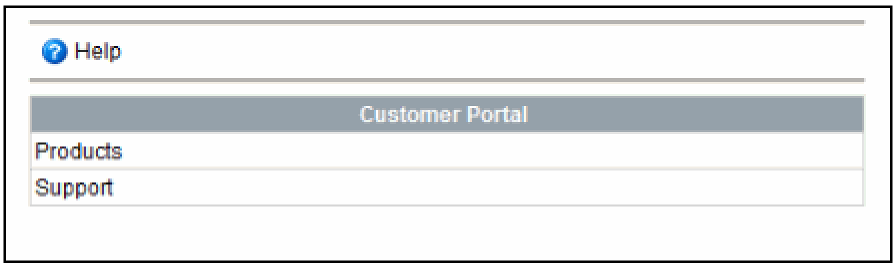


Figure 273 Registration Log Main Page

Figure 274 Registration Log Date Range Selection

Select the date range from the date menu, and click **Go**. Registration data for the selected period is displayed.

> **Note:**
>
> There can be various sections of data. If you change the fields for your Portal, a new section of data is displayed every time you add or remove data fields.

Smart Personalized Portal

Many organizations use HRIS, ERP, or CRM application where user or client data is often related to SKU (Stock Keeping Unit) or code that represents the products or services a client has purchased, or the information to which the client is entitled.

Smart Personalization maps these entitlements to Knowledge Spaces™ security to provide a fully integrated and seamless single sign on user experience that ensures users see only what you want them to see with far less administrative overhead than in the past.

A Personalized Portal using Smart Personalization has the following advantages compared to a normal Knowledgebase Portal that is integrated with active directory:

- The sign on process with Smart Personalization is secured by Advance Encryption Standard.
- External Users and External Access Profiles need not be created in advance.
- The only maintenance required is the mappings between entitlements and Article Groups.

Configuring a Smart Personalized Portal

Only a regular or mobile version of a Personalized Portal designed using **Portal Style # 4** can be configured as a Smart Personalized Portal. Smart Personalized Portal configuration in Knowledge Spaces™ Admin Control Panel includes the following steps:

- Enabling a Portal as a Personalized Portal.
- Enabling Smart Personalization.
- Creating entitlements and associating them to the Article Groups.
- Configuring a secret key for encrypting and decrypting the entitlement package.

Enabling a Portal as a Smart Personalized Portal

On the Security and Access Options page of a Personalized Portal designed using Portal Style #4, you must select the Enable Smart Personalization option to enable the Portal as a Smart Personalized Portal.

Figure 275 Enabling a Portal as a Smart Personalized Portal

Creating Entitlements and associating them to Article Groups

To ensure a fully seamless experience, you must map all anticipated inbound entitlements to Article Groups. The entitlement to Article Group mappings are necessary to restrict a user of a Smart Personalized Portal to only the content configured for the user.

> **Note:**
>
> For information about creating entitlements and associating them to appropriate Article Groups in Knowledge Spaces™.

Configuring a Secret Key

When an entity or a contact from the entitlement based system needs to access a Smart Personalized Portal, an entitlement package with the entity's access details must be sent to the Smart Personalized Portal. You must configure a secret key to be used to encrypt and decrypt the entitlement package from the external entitlement based system, and Knowledge Spaces™ respectively.

To configure a secret key for the entitlement package, carry out the following steps:

1. On the **Administration** tab, click **System Settings**. The **System Settings** page is displayed.
2. In the **Secret Key** field within the **Cipher Settings** section, type a secret key that must be used to encrypt and decrypt the entitlement package.
3. Click **Save**. The secret key is stored in the database.

Smart Personalization Configurations on the External Entitlement System

The configurations on the external entitlement based system to access a Smart Personalized Portal includes the following steps:

- Constructing the encrypted entitlement package
- Posting the encrypted entitlement package to the Smart Personalized Portal.

Constructing the Entitlement Package

When an entity in the external entitlement system needs to login to the Smart Personalized Portal, an entitlement package must be created and posted in the encrypted format to Knowledge Spaces™. The entitlement package must be in the following format:

[{"entitygroup":"<entity name>","entitlement":"<Entitlement1>,<Entitlement2>","timestamp":"<URL posted time>"}]

The following table describes the attributes in the Entitlement Package:

Option	Decription
entitygroup	The name of the entity in the external entitlement system. In the entitlement package format shown in this topic, replace **<entity name>** with the user name of the user who wants to log on to the Smart Personalized Portal.

Option	Decription
Entitlement	The list of entitlements in Knowledge Spaces™ Admin Control Panel. In the entitlement package format shown in this topic, replace <Entitlement1>, <Entitlement2> with the names of the entitlements to which the entity must be granted access on the Smart Personalized Portal.
Timestamp	The time stamp of the entitlement package. In the entitlement package format shown in this topic, replace <URL posted time> with the time when the entitlement package is submitted to Knowledge Spaces™ Admin Control Panel

Posting the Entitlement Package to Knowledge Spaces™

For an entity in an external entitlement system to be able to silently log on to the Smart Personalized Portal, the entitlement package must be constructed for the entity and posted in encrypted format to Knowledge Spaces™ using a Form Post method. When posting the entitlement package, you must send the Knowledge Spaces™ Client ID, and the cid and cpc values of the Smart Personalized Portal to which the entity must be granted access.

The following sample code shows the Form Post method used to post the entitlement package to Knowledge Spaces™:

```
<form action=" http://kbserver.domain.com/
?cid=1&c=12&cpc=HipInPmFmeCD6L6BX82Y1GdW1osuJCIS"
target="KBsearchWin" method="post">

<b>Enter Encrypted Entitlement Package: </b>

<input type="text" name="JITPackage" size=2000 value="+omy/
Yh2zRZMgtvjNCJz5E+s5gToU9MsHIUxB89aaBFufWqwWuc3cG5jU7YZUOvdhb/
DS6KC0zQpQu8sJh/puVRGJfo4zwfKeFFd4aQ4AXUS2BdlWi5ToTT6leIW6su7"/>

<br>

<br>

<input type="submit" name="btnsearch" />

<br>

</form>
```

in the above sample code:

- The **<form>** tag includes the Knowledgebase Client ID and the cid, cpc values of the Smart Personalized Portal.
- The **<input>** tag includes the entitlement package details.

- The value field in the **<input>** tag includes the encrypted value of the entitlement package.

> **Note**
>
> Ensure that the entitlement package that you post to Knowledge Spaces™ is encrypted using the secret key configured in the **Cipher Settings** section on the System Settings page within the Administration tab.

The following steps are performed internally in Knowledge Spaces™ when a Smart Personalized Portal receives an entitlement package from the external entitlement system:

1. The Knowledge Spaces™ Client ID, and the Portal cpc, cid values in the Form Post are verified to check if the access request is for a Smart Personalized Portal.
2. The entitlement package is decrypted using the secret key configured in the **Cipher Settings** section on the System Settings page.
3. The time stamp when the package was posted to Knowledge Spaces™ is validated with the Spaces by Moxie™ - Knowledge Spaces™ Customer Portal server time. If the time interval between the entitlement package URL time and the Spaces by Moxie™ - Knowledge Spaces™ Customer Portal server time is within the range of the **JITTimeInterval** value configured in the **web92.config** file located in the **<KB 9.4 Installation path>\knowledgebase\applicationprogram\ui\http\KBPortal** path on the KB Portal server, the entity from the external entitlement system is granted access and the entity silently logs on to the Smart Personalized Portal.
4. The attributes in the entitlement package are validated:
   i. It is verified if the entity group is already created as an External Access Profile and External User in Knowledge Spaces™ Admin Control Panel.
   ii. If the entity group does not exist in Knowledge Spaces™ Admin Control Panel, an External Access Profile, and External User are dynamically created for the entity group.
5. It is verified if the entitlements in the package exist in Knowledge Spaces™ Admin Control Panel.

Smart Personalized Portal - Error Codes

The following table describes the error codes displayed when a User's sign in to the Smart Personalized Portal fails:

Error Code	Description
ERR001	The time stamp is not available in the entitlement package.
ERR002	The time interval between the Smart entitlement package time and the Spaces by Moxie™ - Knowledge Spaces™ Customer Portal server time is not within the range of the **JITTimeInterval** value configured in the **web92.config** file located in the **<KB ()2 Installation path>\knowledgebase\applicationprogram\ui\http\KBPortal**.

External Access Profiles

This chapter provides detailed information about External Access Profiles in Knowledge Spaces™ Admin Control Panel Admin Control Panel.

About External Access Profiles

The External Access Profiles provide a means to create general external user settings and apply the profiles to the External Users. The External Access Profiles eliminate the need to manage External User permissions individually for each user. The External Access Profiles page enables you to create edit, clone, and delete External Access Profiles.

Note:

- You must be granted the **External Access Profile** permission to access the External Access Profile functionality in Knowledge Spaces™ Admin Control Panel.
- External Access Profile created by Smart Personalized Portal cannot be edited, or cloned. For information on Smart Personalized Portal.
- When creating new External Users, you can select the External Access Profile to give access to the group of information you want the User to access.

Creating a New External Access Profile

You can create a new External Access Profile. When you create a new External User, you can select the External Access Profile, and automatically assign the user permissions.

Note:

You must be granted the **Create External Profile** permission to create a New External Access Profile.

On the External Access Profile Home page, click **New User Profile**. The_**New User Profile** page is displayed.

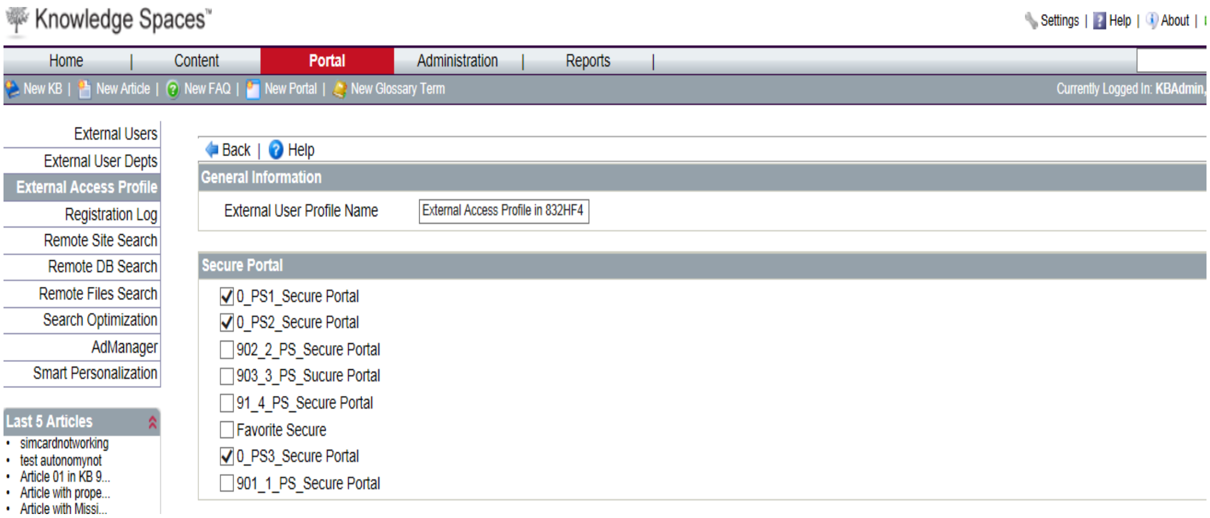


Figure 276 New User Profile Page...1

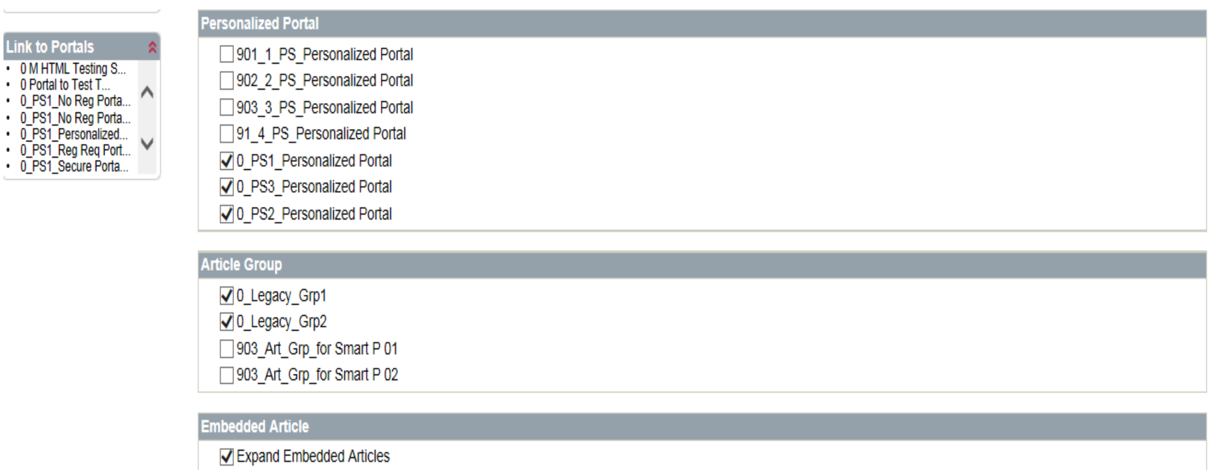


Figure 277 New User Profile Page....2

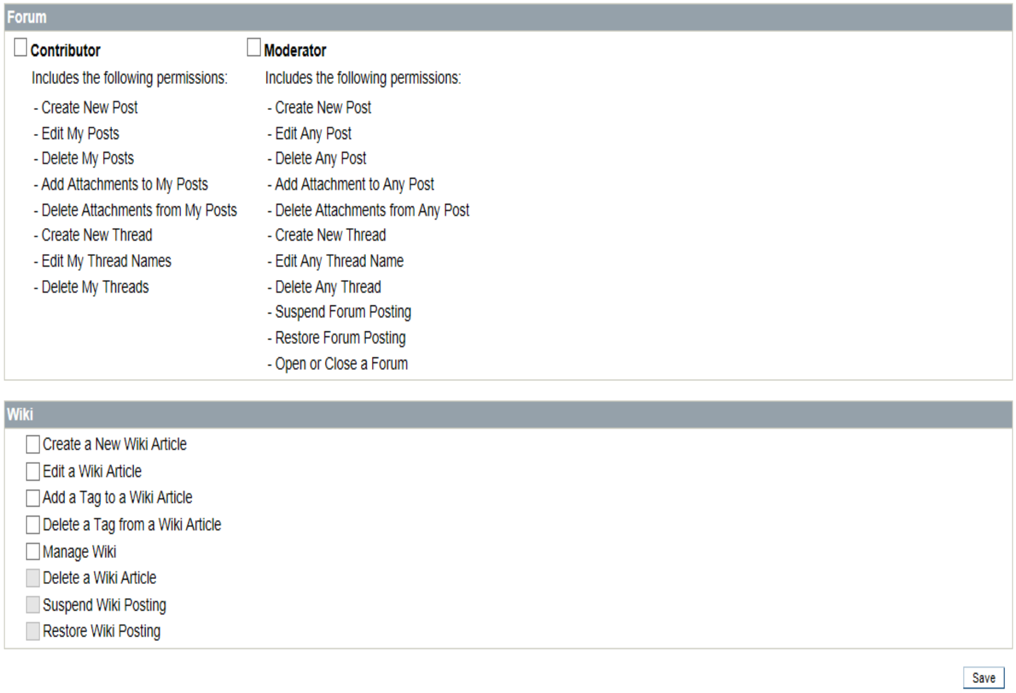


Figure 278 New User Profile Page....3

The following table describes the options available on the New User Profile page:

Option	Description
General Information	
External User Profile Name	Enter a unique name for the new User Profile.
Secure Portal	The Secure Portals created in Knowledge Spaces™ are listed for selection. Select the Portal(s) you want an External User associated to the Profile to access.
Personalized Portal	The Personalized Portals created in Knowledge Spaces™ are listed for selection. Select the Portal(s) you want an External User associated to the Profile to access.
Article Group	The Article Groups created in Knowledge Spaces™ are listed for selection. Select the Article Group(s) you want to associate to the Profile.
Embedded Article	

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Expand Embedded Articles</td><td>You can configure the display format of the Embedded Articles for an External User on the Portal. To display an Embedded Article with the Child Articles in the expanded form, you must select the Expand Embedded Articles option. This option is selected by default when you create an External Access Profile.</td></tr>
<tr><td colspan="2">Forum
This section lists the Contributor, and Moderator permissions required for an External User to contribute to, and manage Forums on a Portal.
Select the required Forum permissions you want to grant to an External User associated with the Profile.</td></tr>
<tr><td>Contributor</td><td>Select the Contributor option to enable the External Users associated to the Profile to contribute to Forums.
An External User with the Contributor permission can perform the following operations on the Portal:
• Create new Posts: Create new Forum Posts within a Forum Thread on a Portal.
• Edit My Posts: Edit the Forum Posts the User has posted on a Portal
• Delete My Posts: Delete the Forum Posts the User has posted on a Portal.
• Add Attachments to My Posts: Add attachments to the User’s Forum Posts on a Portal.
• Delete Attachments from My Posts: Delete attachments from the User’s Forum Posts on a Portal.
• Create new Threads: Create new Forum Threads on a Portal.
• Edit My Thread Names: Edit the names of the Threads created by the User.
• Delete My Threads: Delete the Forum Threads created by the User.</td></tr>
</table>

Option	Description
Moderator	Select the Moderator option to enable the External Users associated to the Profile to mange the Forums on the Portal. **An External User with the Moderator permission can perform the following operations on the Portal:** **Create new Post: Create new Forum Posts within a Forum Thread on a Portal.** **Edit Any Post: Edit any Forum posted on the Portal.** **Delete Any Posts: Delete any Forum Post on the Portal.** **Add Attachments to Any Posts: Add attachments to the Posts on the Portal.** **Delete Attachments from Any Post: Delete attachments from any Post on the Portal.** **Create new Thread: Create new Forum Threads on the Portal.** **Edit Any Thread Name: Edit any Forum Thread on the Portal.** **Delete Any Thread: Delete any Forum Thread on the Portal.** **Suspend Forum Posting: Suspend user(s) from posting content in a Forum on the Portal.** **Restore Forum Posting: Activate suspended Portal users to post content on a Forum in the Portal.** **Open or Close a Forum: Open, or close a Forum on the Portal. When a Forum is closed on a Portal, the user activity within the Forum is suspended.**
Wiki **This section lists the permissions required for an External User to contribute to, and manage Wikis on a Portal.** **Select the required Wiki permissions you want to grant to an External User associated with the Profile.**	
Create a New Wiki Article	Enables a Portal user associated with the profile to create new Wiki Articles on a Portal.
Edit a Wiki Article	Enables a Portal user associated with the profile to edit a Wiki Article on a Portal.
Add a Tag to a Wiki Article	Enables a Portal user associated with the profile to add Tags to a Wiki Article on a Portal.
Delete a Tag from a Wiki Article	Enables a Portal user associated with the profile to delete Tag(s) associated to the Wiki Article(s) on a Portal.
Manage Wiki	Enables a Portal user to manage Wikis on a Portal.
Delete a Wiki Article	Enables a Portal user associated with the profile to delete a Wiki Article on a Portal. **Note: The Delete a Wiki Article permission is available for selection only if you have selected the Manage Wiki permission.**
Suspend Wiki Posting	Enables a Portal user to suspend other Portal users from contributing to the Wikis on the Portal. **Note: The Suspend Wiki Posting permission is available for selection only if you have selected the Manage Wiki permission.**

Option	Description
Restore Wiki Posting	Enables a Portal user to activate other suspended Portal users to contribute to the Wikis on the Portal. **Note: The Restore Wiki Posting permission is available for selection only if you have selected the Manage Wiki permission.**
Save	Click to save the new User Profile.

To Create an External Access Profile

1. From the **Portal** page, click **External Access Profile**. The **External Access Profile** page is displayed.

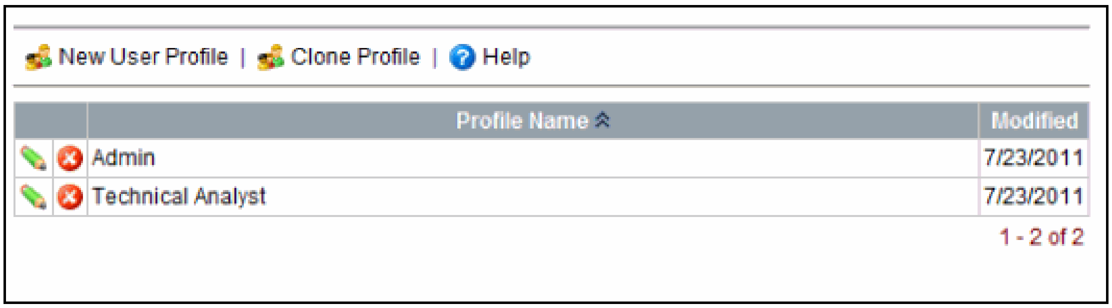


Figure 279 External Access Profile Page

2. Click .

 The New User Profile page is displayed.
3. In the **External User Profile** Name field, type the name for the new profile.
4. In the **Secure Portal** area, select the Portal(s) you want the External Users associated with this profile to access.

> **Note:**
>
> The Secure Portals created in Knowledge Spaces™ Admin Control Panel are listed for selection.

5. In the **Personalized Portal** area, select the Portal(s) you want the External Users associated with this profile to access.
6. In the **Article Group** area, select the Article Groups you want the External Users associated with this profile to access.

> **Note:**
>
> The Article Groups created in Knowledge Spaces™ are listed for selection.

7. Select the **Expand Embedded Article** option if you want the External Users associated with the profile to view an Embedded Article with the child Articles in the expanded form. This option is selected by default when you create an External Access Profile.
8. In the **Forum** area, select the Forum permissions you want to grant to the External Users associated with the profile.
9. In the Wiki area, select the Wiki permissions you want to grant to the External Users associated with the profile.
10. Click **Save**. The new profile is saved.

Editing External Access Profiles

The existing External Access Profiles are displayed on the **External Access Profiles** page. You can edit an existing Access Profile.

> **Note:**
>
> You must be granted the **Edit External Profile** permission to edit External Access Profiles.

To Edit an External Access Profile

1. From the Portal page, click **External Access Profile**. The **External Access Profile** page is displayed.
2. Click  to the left of the Profile name, or click the Profile name. The Access Profile information Page is displayed.
3. Edit the profile name, or change the profile permissions.
4. Click **Save.**

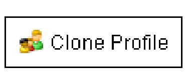
> **Note:**
>
> If you make changes to a profile, it will not update the External Users with the new profile settings. You must reassign the profile to the External Users.

Cloning an External Access Profile

Cloning an External Access Profile enables you to create a copy of a previously available External Profile. When you do so, External User permissions assigned to the original Profile are copied to a new Profile.

When you modify the new Profile, details of the original Profile remain unchanged.

To Clone an External Access Profile

1. From the **Portal** tab, click **External Access Profile**. The **External Access Profile** page is displayed.
2. Click . 

The **Clone External Access Profile** page is displayed.

3. In the **External User Profile Name** field, type a name for the new Profile.
4. From the **Clone Profile** list, select the Profile whose details you want to clone.
5. Click **Save**. The **External Profile** is cloned.

> **Note:**
>
> In a scenario where External Access Profiles are not available, the General Information page is not displayed when you click 
>
> .

Deleting External Access Profiles

You can delete External Access Profiles.

> **Note:**
>
> You must be granted the **Delete External Profile** permission to delete External Access Profiles.

To Delete an External Access Profile

1. From the **Portal** tab, click **External Access Profile**. The **External Access Profile** page is displayed.
2. On the left of the Profile name you want to delete, click . You are prompted with the following message.

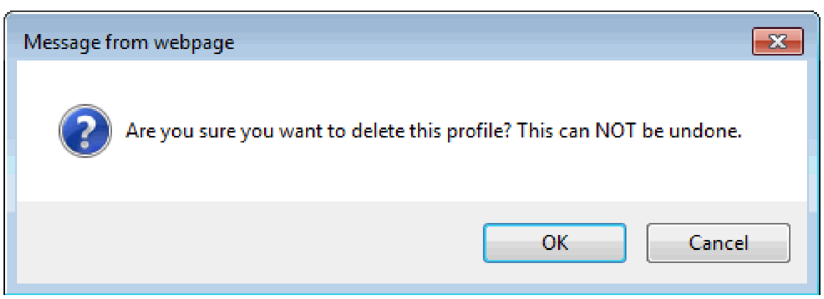


Figure 280 Deleting an External Access Profile

3. Click OK. The External Access Profile is deleted.

> **Note:**
>
> Deleting an External Access profile will not delete Users who have been assigned this profile. The Users will retain the permissions they have been assigned with the last profile application.

\- Or -

If there are Users associated to the Profile the following message is displayed.

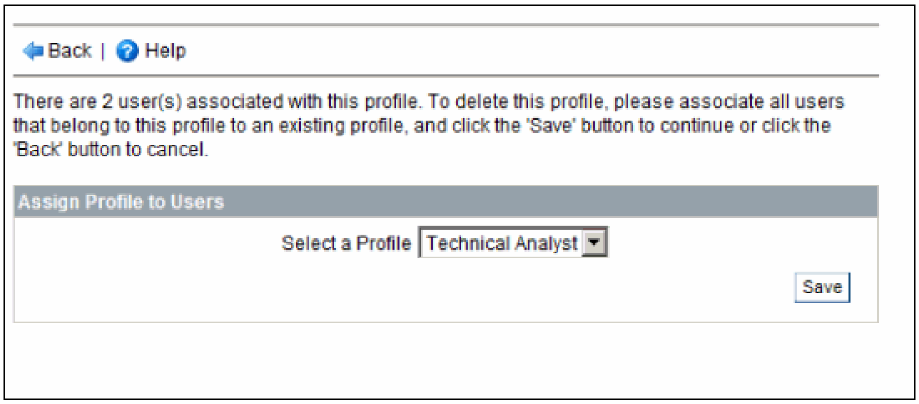


Figure 281 Assign Profile to Users Page

4. Select an existing Profile to which you want to associate the Users.
5. Click **Save**.

External User Departments

This chapter provides detailed information about managing External User Departments in Knowledge Spaces™ Admin Control Panel.

About External User Departments

The External User Departments area of the Portal tab enables you to create and configure External User Departments to associate External Users within different Departments. After assigning the Users to Departments, an External Access Profile can be applied to the Users in a specific Department.

> **Note:**
>
> You must be granted the **External User Departments** permission to access the External User Departments page in Knowledge Spaces™ Admin Control Panel.

On the **Portal** tab, click **External User Department**s menu. The **External User Departments** page is displayed.

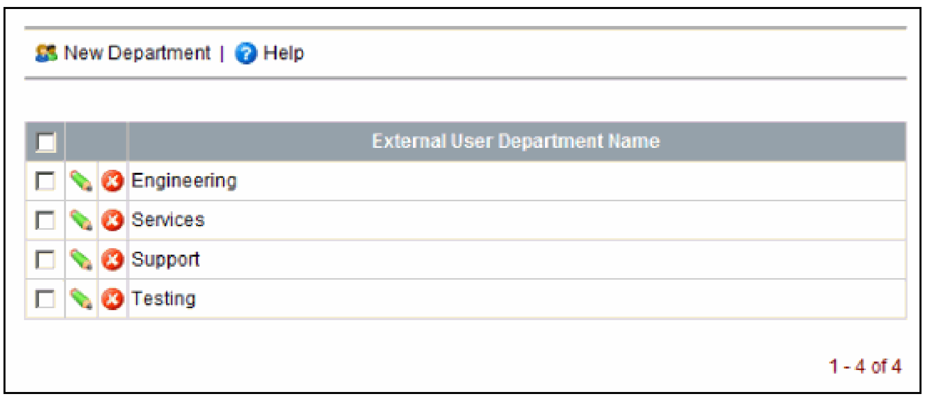


Figure 282 External User Departments Page

Creating New External User Departments

You can create new External User Departments. Use the New External User Department page to create External User Departments.

To Create a New External User

1. On the **Portal** tab, click **External User Departments** menu. The **External User Departments** page is displayed.
2. Click 

. The **New External User Departments** page is displayed.

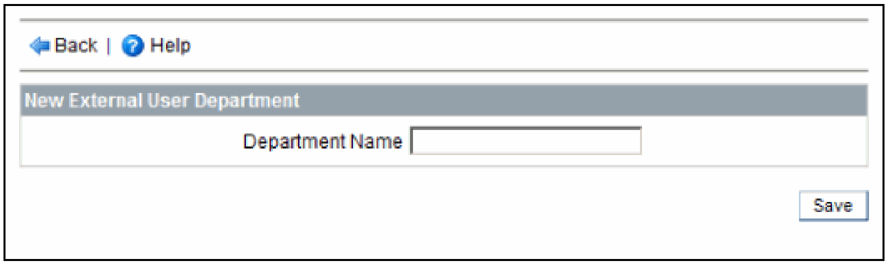


Figure 283 New External User Department Page

3. In the **Department Name** field, type the name for the new Department.
4. Click **Save**. The new Department you created is displayed in the External User Departments page.

Renaming a Department

You can edit the name of an External User Department.

To Rename the External User Department

1. On the **Portal** tab, click **External User Departments** menu. The **External User Departments** page is displayed.
2. Click  next to the Department you want to rename. The **Edit External User Department** page is displayed.

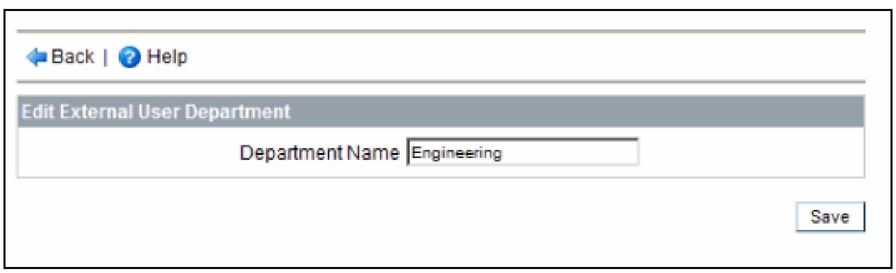


Figure 284 Edit External User Department Page

3. In the **Department Name** field, type the new name of the Department.
4. Click **Save.** The Department is renamed.

Editing External Users Within a Department

You can edit the details of an External User belonging to the Department to which you are granted access.

To Edit the External Users within a Department

1. On the **Portal** tab, click **External User Depts** menu. The **External Departments** page is displayed.
2. Click the name of the **Department.** The list of External Users belonging to the Department is displayed.

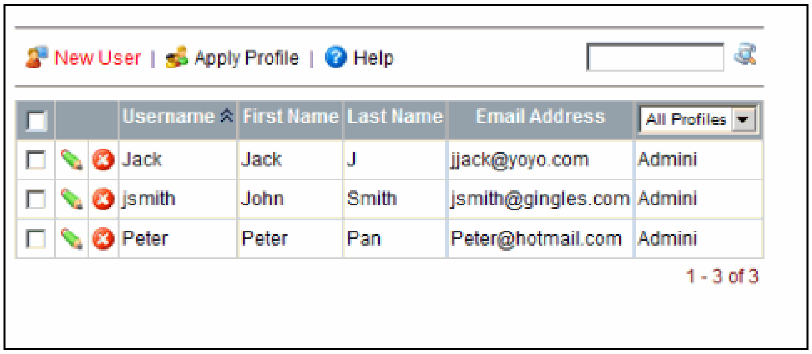


Figure 285 List of External Users in a Department

3. Click to the left of the External User Name you want to edit.
   - OR -
   Click the name of the User in the User Name column.
   The External User Information page with the details of the User is displayed.
4. Make the changes, or additions in the User information.
5. Click **Save**. The User information is saved.

Deleting a Department

You can delete Departments.

To Delete a Department

1. On the **Portal** tab, click **External User Depts** menu. The **External User Departments** page is displayed.
2. Click next the Department you want to delete. You are prompted with the following message.

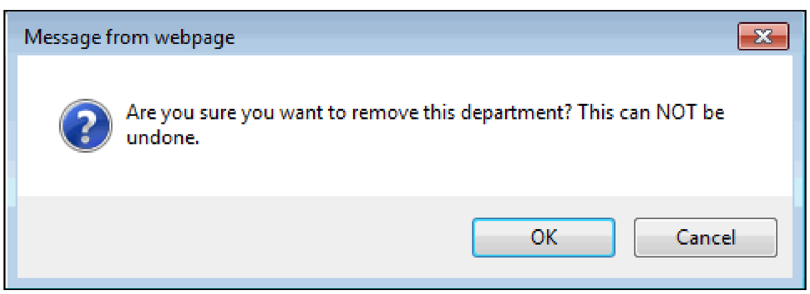


Figure 286 Delete Department Confirmation Dialog Box

3. Click **OK**. The Department is deleted.
   - OR -
   Click **Cancel** to cancel the operation.

Applying Access Profile to Multiple External Departments

The Apply Profile button on the External User Departments page enables you to apply the External User profile to multiple External User Departments.

Note:

- Applying a Profile for a Department enables you to apply the profile to all the users belonging to the Department.
- If you edit an External User profile, use the **Apply Profile** option, to mass update the profile for the Departments to which the profile was previously applied.

To Apply an Access Profile to Multiple Departments

1. On the **Portal** tab, click **External User Depts** menu. The **External User Departments** page is displayed.
2. Select the Department(s) to which you want to apply the changed profile.
3. Click 

. You are prompted with the following message.

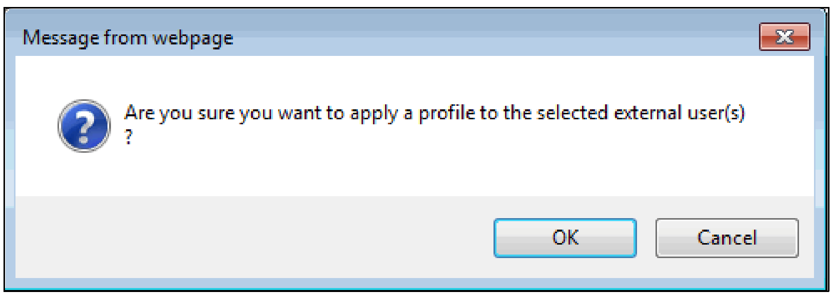


Figure 287 Update a Profile to Multiple Departments

4. Click **OK**. The profile is updated to the selected Departments.

   - OR -

   Click **Cancel** to cancel the operation.

External Users

This chapter provides you with detailed information about managing External Users in Knowledge Spaces™ Admin Control Panel.

About External Users

The External Users area of the Portal tab enables you to create and configure External Users to access a Username Required type of KB Portal. You can also assign a Department for the User.

> **Note:**
>
> You must be granted the **Manage User Access** permission to manage External Users in Knowledge Spaces™.

For an External User to access a Username Required Portal, the User must be assigned a valid username and password that permits entry to the Knowledge Base through the Portal. If you want to create a personalized Portal that displays set Groups of articles based on the user login, you must create a secure Portal and manage the article permissions of the External Users from this area.

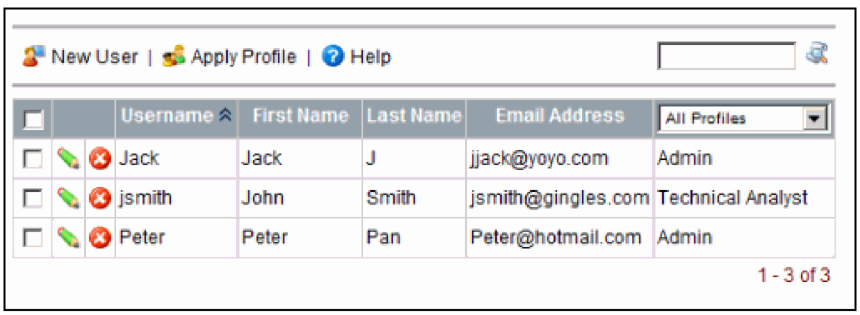


Figure 288 External Users Main Page

The External Users main page lists the External Users, and their E-mail addresses.

There are two fields:

- Username
- E-mail Address

To the right of the **Email Address** column is a list box, listing all the Departments to which you have access. To view the list of External Users within a Department, click in the list box and select the Department. The User(s) within the Department are displayed.

> **Note:**
>
> You must be granted the **External Users** permission to create a New External User.
>
> External Users created at runtime by Smart Personalized Portal cannot be edited or deleted.
>
> Selecting the **All Departments** option in the list box, lists the External Users of all the Departments created in Knowledge Spaces™.
>
> You can view the External Users list only of the Departments for which you have access.
>
> For more information about access to different Departments see **“Internal Users” on page 417**.
>
> For more information, see **“Password Management” on page 425**.

Creating New External Users

You can create new External Users. Use the New External User page to create Users to access the Username Required type of KB Portals.

> **Note:**
>
> You must be granted the **Create New External User** permission to create a new External User.

> **Note:**
>
> The External user name is unique.

To Create a New External User

1. On the **Portal** page, click **External Users** menu. The **External Users** page is displayed.
2. Click 

. The **General Information** page is displayed.

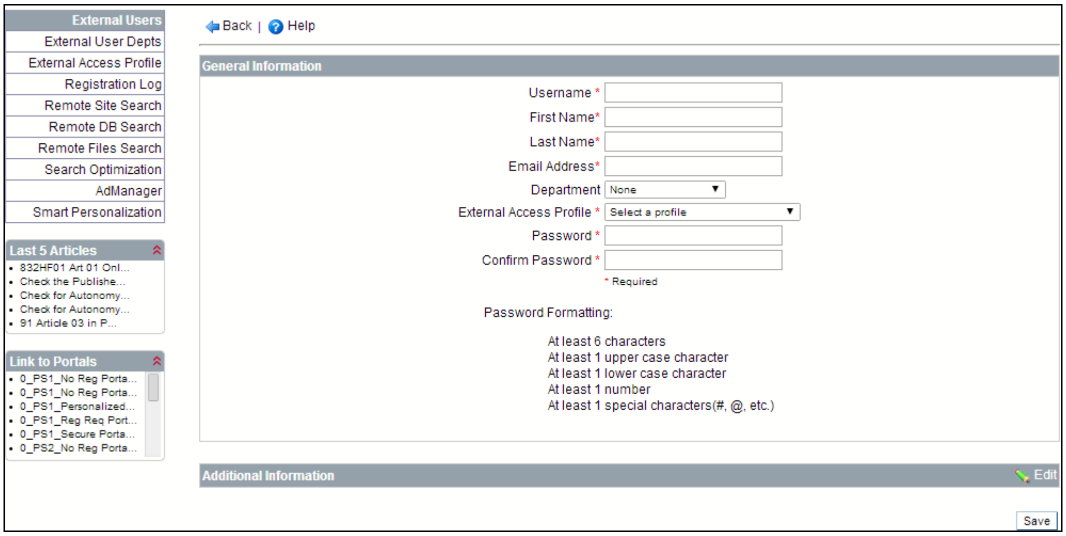


Figure 289 New External User Page

3. Enter the Username, and Password. Type the password again in the Confirm Password field.
4. Type the information in the First Name, Last Name, and Email Address fields.
5. Select a Department from the Department list.

> **Note:**
>
> - Only the Departments for which you have access are listed in the Department list.
> - For more information about access to the Departments.

6. Select an External Access Profile. The profile defines the permissions that this External User has when logging on to the KB Portal.
7. You can enter additional information in the fields within the Additional Information area.

> **Note:**
>
> To customize the fields displayed within the Additional Information area, see **"Customizing the Fields in the Additional Information Area" on page 360**.

8. Click **Save.** The new User appears in the External Users list within the assigned Department.

Customizing the Fields in the Additional Information Area

You can customize the Fields in the Additional Information Area on the **New External User** page.

1. On the Portal page, click External Users menu. The **External Users** page is displayed.

2. Click New User. The New User information page is displayed.
3. Click Edit in the **Additional Information** area. The Additional Information page is displayed.

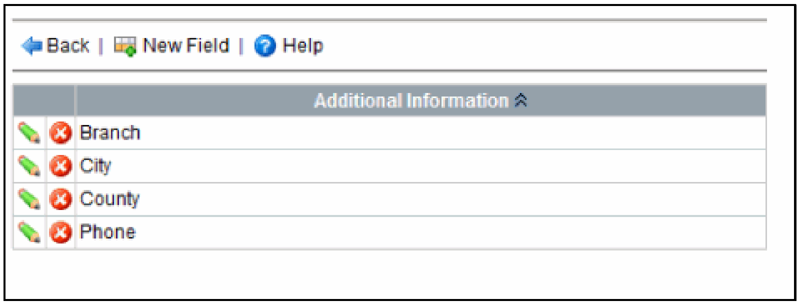


Figure 290 Additional Information Page

4. Click New Field .The **Create Additional Field** page is displayed.

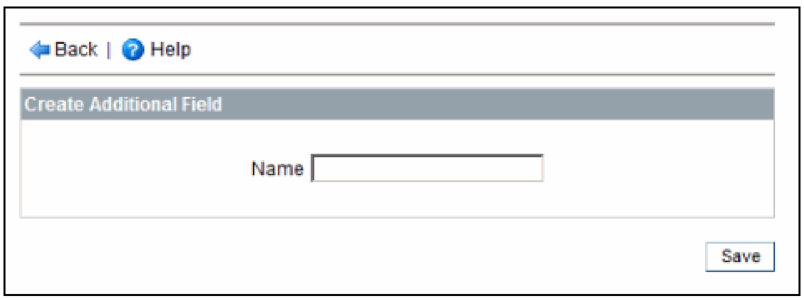


Figure 291 Create Additional Field Page

5. Enter the name for the new Field in the Name field.
6. Click **Save**. The new field is displayed in the Additional Information area.

   You can also reference all the user fields, including the fields that you create in Additional Information in the portal itself.
7. Go to the Portal modules, and create a custom tab. In the content field of the custom tab, reference the fields in the following manner: [[euser:Infoname]]

Example:

If you create an information field called Department, you can retrieve it in the portal optional tabs by typing [[euser:Department]].

When an External Users logs on to the Portal, the user information is displayed in the custom tab created.

> **Note:**
>
> The Additional field information is not stored in the Database, and cannot be reported.

Editing External Users

You can edit the details of an External User belonging to a Department to which you are granted access.

To Edit External Users

> **Note:**
>
> An External User created dynamically through Smart Personalized portal cannot be edited.

1. On the **Portal** tab, click **External Users** menu. The **External Users** page is displayed.
2. Select the Department associated with the External User, whose details you want to edit.
3. The list of External Users belonging to the Department is displayed.
4. Click to the left of the External User Name you want to edit.
   - OR -
   Click the name of the User in the User Name column.
   The External User Information page with the details of the User is displayed.
5. Make the changes.
6. Click **Save**. The User information is saved.

Deleting an External User

You can delete an External User belonging to the Department to which you are granted access.

To Delete an External User

1. On the **Portal** tab, click **External Users** option. The **External Users** page is displayed.
2. Select the Department associated with the External User, whose details you want to delete.
   The list of External Users belonging to the Department is displayed.
3. Click to the left of the User name you want to delete. You are prompted with the following message.

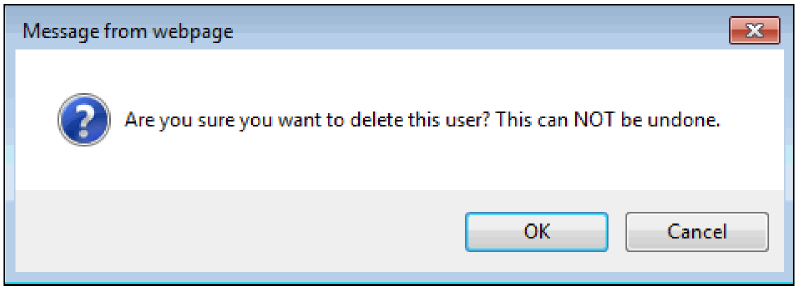


Figure 292 Delete External User Confirmation Dialog Box

4. Click **OK** to confirm the deletion of the User.

   - OR -

   Click **Cancel** to cancel the operation.

Applying an Access Profile to Multiple External Users

The Apply Profile on the External Users page enables you to apply a profile to a set of External Users to set the permissions, and is intended to save time by avoiding the need to check all the individual permissions for each External user.

> **Note:**
>
> If you edit an External User profile, use the **Apply Profile** option, to mass update the profile for the External Users to whom the profile was previously applied.

To Apply an Access Profile to Multiple Users

1. On the **Portal** tab, click **External Users** menu. The **External Users** page is displayed.
2. Select the Department associated with the External Users, to whom you want to apply an Access Profile. The list of External Users belonging to the Department is displayed.
3. Select the External Users to whom you want to apply the profile.
4. Click Apply Profile. You are prompted with the following message.

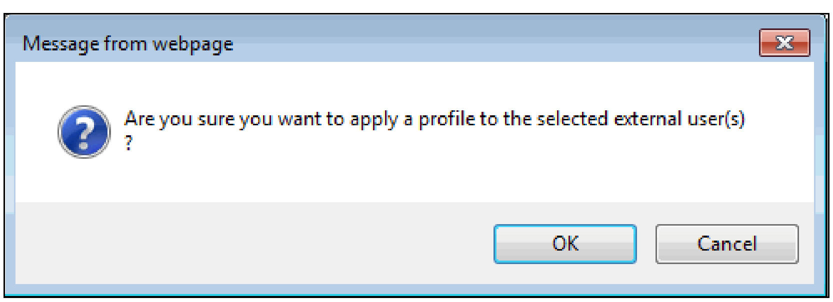


Figure 293 Update a Profile to Multiple Departments

5. Click **OK**. The profile is updated to the selected Users.

- OR -

Click **Cance**l to cancel the operation.

Remote Site Search

This section provides you with detailed information about configuring Remote Site Search in Knowledge Spaces™ Admin Control Panel.

About Remote Site Search

You can create a list of Web sites that the Portals can spider and index in addition to the standard Knowledge Spaces™ content. You must then configure the remote sites to be available on the Portal for the Portal users to search in addition to searching standard Knowledge Spaces™ content. The **Search Options** area on the **Portal Settings** page enables you to configure the Web Sites that must be available for search on the Portal.

The Remote Site Search page provides additional options, which enable you to configure a SharePoint Sites Collection, a SharePoint Web Application, or All SharePoint Web Applications on the SharePoint Server to be available for search on Portals, see **“Installing SharePoint Connector on Admin Server” on page 490** to install SharePoint Connector.

> **Note:**
>
> - Remote Site Search is a licensed feature, and can be purchased from Moxie Software™ separately as an add-on module.
> - The Remote Site Search feature is available for you only if the **Remote Site Search** option is configured for the Internal Access Profile associated to you.
> - The **Remote Site Search** feature enables the Portals to index and search only the static content of web pages. The dynamically generated content, database driven content, and web pages with redirects cannot be indexed.

Creating a Remote Website For Search

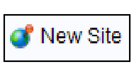
You must create the list of websites that you want the Portals to index, and search in addition to the standard Knowledge Spaces™ content.

You can create two types of Remote Sites:

- Standard Remote Site
- Sharepoint Remote Site

Creating a Standard Remote Site

To create a Remote Website for search, carry out the following steps:

1. On the Portal tab, click the **Remote Site Search** menu. The **Remote Site Search** page is displayed.
2. Click 

. The **New Site** page is displayed.

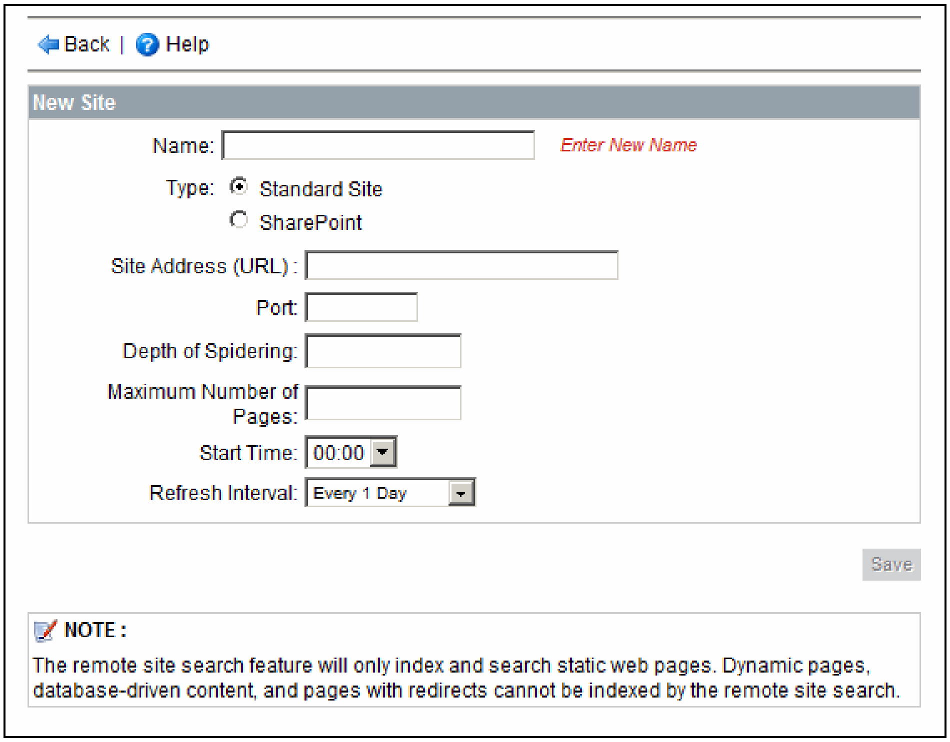


Figure 294 New Site Page

3. In the **Name** field, enter a name for the Website.
4. In the **Type** field, select Standard Site, or SharePoint based on the type of Site you want to configure for Search. Standard Site is selected by default.
5. In the **Site Address (URL)** field, enter the URL of the Remote Site.
6. In the **Port** field, enter the port used to connect to the Remote Site.
7. In the **Depth of Spidering** field, enter the maximum depth of the site that should be spidered.

> **Note:**
>
> Depth is defined as the number of links required to reach a page from the spidering start point.

8. In the **Maximum Number of Pages** field, enter the maximum number of pages on the Remote Site that should be examined to find valid pages to index.
9. In the **Start Time** field, select when spidering should start when the Remote Site data is refreshed.
10. In the **Refresh Interval** field, select the interval at which the Knowledge Spaces™ search engine must access, and spider the Remote Website.

7. Click **Save** to create the new Website.

> **Note:**
>
> To enable Remote Site Search for a Portal, on the Portal Search Options page associated with the Portal, select the **Remote Site Search** menu, and subsequently select the Websites to be available on the Portal for search.

Editing a Remote Website

The Remote Sites configured are displayed on the Remote Site Search page. You can edit an existing Remote Website.

To edit a Remote Website

1. On the **Portal** tab, click **Remote Site Search menu**. The **Remote Site Search** page is displayed.
2. Click to the left of the Remote Site name, or click the Site name. The **Edit Remote Site** page is displayed.
3. You can change the settings on the page as required.
4. Click **Save**.

Deleting a Remote Website

You can delete an existing Remote Website.

To delete a Remote Website

1. On the **Portal** tab, click **Remote Site Search**. The **Remote Site Search** page is displayed.
2. On the left of the Remote Site name you want to delete, click . You are prompted with the following message:

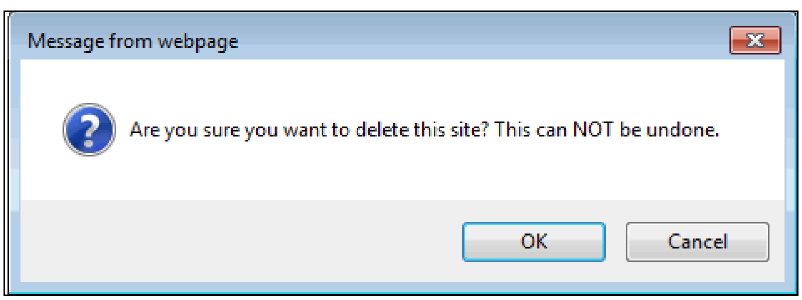


Figure 295 Deleting A Remote File System

3. Click **OK**. The Remote Site is deleted.

Creating a SharePoint Remote Site

To configure a SharePoint Site Collection, Share Point Web Application, or Share Point Web Applications for Portal search, carry out the following steps:

1. From the Portal tab, click **Remote Site Search**. The Remote Site Search page is displayed.

2. Click 

. The New Site page is displayed.
3. In the **Name** field, specify a name for the Site.
4. Select **SharePoint** in the **Type** section. The options for SharePoint Site configuration are displayed on the page

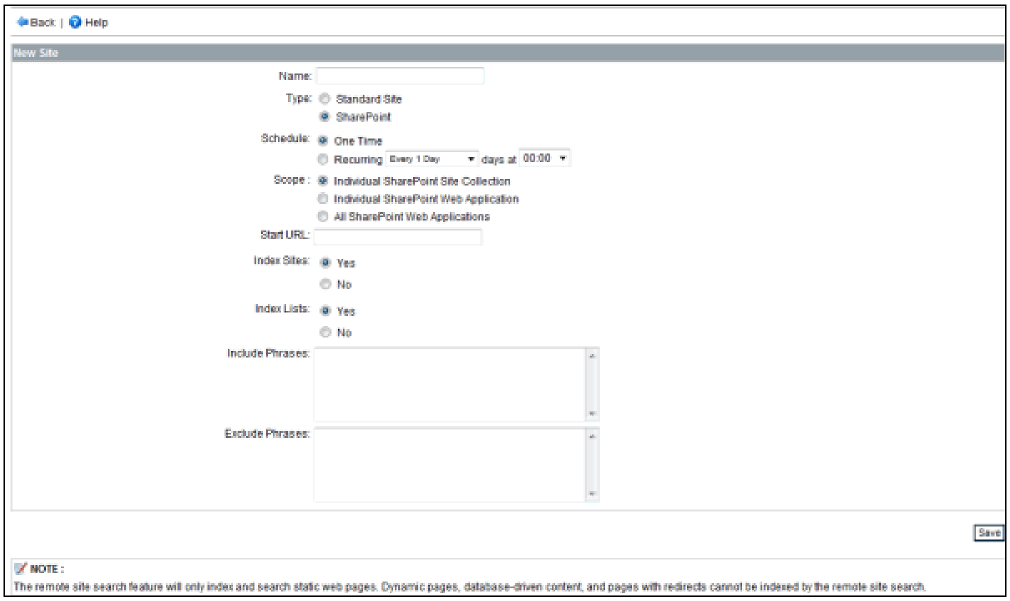


Figure 296 New Site Page

5. In the **Schedule** section, select an option based on how you want the Spaces by Moxie™ Knowledge Spaces search engine to crawl the SharePoint Site.

- Select **One Time** if you want Spaces by Moxie™ Knowledge Spaces search engine to index the SharePoint Site only once.
- If you want Spaces by Moxie ™ Knowledge Spaces search engine to index the SharePoint Site frequently at a specified interval, select the **Recurring** option, and the interval and time at which you want the search engine to index the content on the Site.

  For example, if you want Knowledge Spaces™ Admin Control Panel search engine to index the content on the Site once every five days at 1 PM SharePoint server time, select **Every 5 Days** from the Recurring drop down list, and 13:00 from the days at drop-down list box.

6. In the Scope section, select an option based on the type of SharePoint Site you are configuring to be available for search in Knowledge Spaces™ Admin Control Panel.
   - Select **Individual SharePoint Site Collection** if you are configuring a SharePoint Site Collection with sub Site in it for search. This configuration enables Knowledge Spaces™ Admin Control Panel SharePoint Connector to fetch documents from an individual SharePoint Site Collection.
   - Select **Individual SharePoint Web Application** if you are configuring a SharePoint Web Application with one or more Share Point Site Collections in it for search. This configuration enables Knowledge Spaces™ Admin Control Panel SharePoint Connector to fetch documents from all the Sites within a SharePoint Web Application.
   - Select **All SharePoint Web Applications** if you are configuring all the SharePoint Web Applications on a SharePoint server for search. This configuration enables Knowledge Spaces™

Admin Control Panel SharePoint Connector to fetch documents from all the SharePoint Web Applications on a SharePoint server.

7. In the **Start URL** field, specify the URL of the page in the SharePoint Application from where the Knowledge Spaces™ Admin Control Panel SharePoint Connector should start crawling.
8. In the Index Site section, select Yes if you want the Knowledge Spaces™ Admin Control Panel SharePoint Connector to index the Site, as well as their contents. A document is created by the SharePoint Connector for each Site.
9. In the Index Lists section, select Yes if you want the Autonomy SharePoint Connector to index the Lists, as well as their contents. A document is created by the SharePoint Connector for each List on the Site.
10. In the Include Phrases section, specify the words or phrases that the Knowledge Spaces™ Admin Control Panel Search Engine must check for in the titles of the SharePoint documents, and index such documents.

Note:

- Ensure that you specify the words or phrases in separate lines for the Spaces by Moxie ™ Knowledge Spaces Search Engine to recognize them as separate words.
- The Documents whose titles include any word or phrase specified in this section will be indexed by the Knowledge Spaces™ Admin Control Panel Search Engine.

11. In the **Exclude Phrases** section, specify the words or phrases that the Knowledge Spaces™ Admin Control Panel Search Engine must check for in the titles of the SharePoint documents, and exclude such documents from getting indexed.

Note:

- Ensure that you specify the words or phrases in separate lines for the Spaces by Moxie™ Knowledge Spaces Search Engine to recognize them as separate words.
- The Documents whose titles include any word or phrase specified in this section will not be indexed by the Spaces by Moxie™ Knowledge Spaces Search Engine.

12. Click **Save** to create the new SharePoint site.

    The following figure shows the Remote Site Search page with the list of Remote Sites, and Share Point Sites configured:

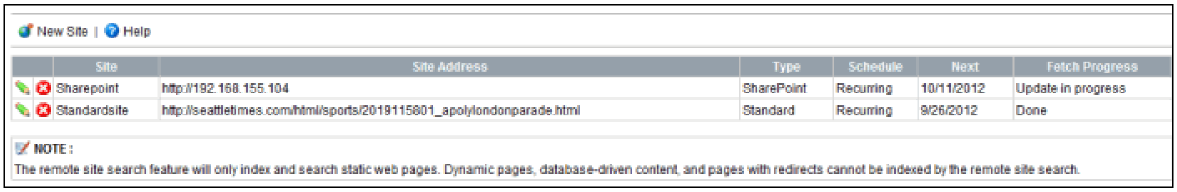


Figure 297 Remote Site Search Page with Standard and SharePoint Sites

Enabling SharePoint Search for a Portal

After you configure a SharePoint Site from the Remote Site Search page, you must enable SharePoint search for a Portal.

To enable SharePoint Search for a Portal, carry out the following steps:

1. In the **Portal** tab, select the Portal for which you want to enable SharePoint search.
2. In the Portal Modules section, click **Configure.** The Portal Modules page is displayed.
3. Click the **Search Options** link. The Portal Search Options page is displayed.
4. Select the **Remote Site Search** option. The Standard Sites, and the SharePoint Sites configured for Remote Search are listed.
5. Select the required SharePoint Sites that must be available on the Portal for search.
6. Click **Save**. The Portal is now enabled to display content from SharePoint sites.

   When a Portal User clicks on a SharePoint document to view its content. The document in SharePoint Site is opened in a new browser window.

> **Note:**
>
> The user may be prompted to specify the login credentials to log on to the SharePoint Site to view the content of the document.

Remote Database Search

This chapter provides you with detailed information about configuring Remote Database Search in Knowledge Spaces™ Admin Control Panel.

About Remote Database Search

An important element of Enterprise Search is the ability to access data in a multitude of locations and sources. Knowledge Spaces provides the ability to index content from any databases to which an ODBC connection can be established. Indexing requires having an existing ODBC connection between the application server where Knowledge Spaces™ Admin Control Panel is installed, and the target database.

Remote Database Search feature enables you to create a list of Databases that the Portals can spider and index in addition to the standard Knowledge Spaces content. Within each Remote Database, you can configure multiple Database queries that you want to use for Remote Database Search.

- Configuring a Database Connection enables you to:
- create an SQL query to get the information you want from the Remote Database
- Configure the columns that must be displayed in the end results on the Portal.
- Configure a Display column as a column which has a hyperlink
- Define the look and feel of the Remote Database content when selected from the Search Results page.

> **Note:**
>
> Refer Microsoft documentation for instructions for creating ODBC connections.

You must then configure the Remote Databases that must be available for search on the Portal in addition to searching the standard Knowledge Spaces content. The Search Options area on the Portal Settings page enables you to configure the external databases that must be available for search on the Portal Home Page.

> **Note:**
>
> Remote Database Search is a licensed feature, and can be purchased from Moxie Software™ separately as an add-on module.
>
> The **Remote Database Search** feature is available for you only if the Remote Database Search feature is configured for the Internal Access Profile associated to you.
>
> To enable Remote Database Search for a Portal, on the Portal Search Options page associated with the Portal, select the Remote DataBase Search feature, and subsequently select the Remote Databases to be available on the Portal for search.
>
> Remote Database Search is not available for Portals created using Portal Style # 1, Portal Style # 2 or Portal Style # 3.

Creating a Remote Database

A Remote Database is essentially an ODBC connection. You must create the list of Databases that you want the Portals to index, and search in addition to the standard Knowledge Spaces content.

To create a Remote Database for search, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal > Remote DB Search**, the **Remote Database** page is displayed.
2. Click **New Remote Database**. The **New Database Content** page is displayed.

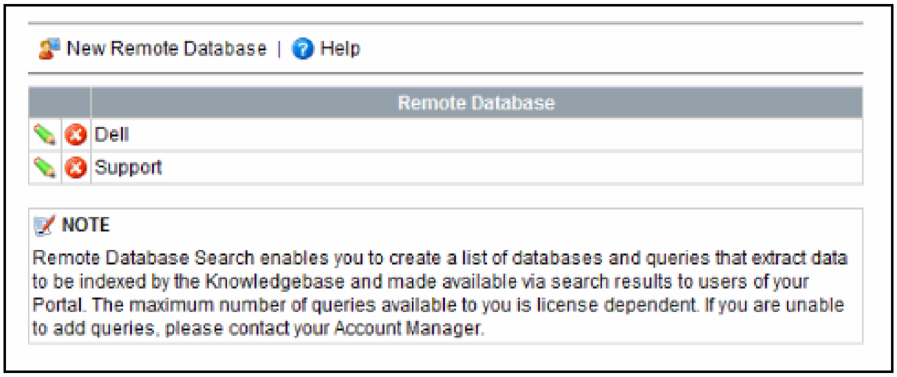


Figure 298 New Database Content Page

3. Enter a unique name for the Remote Database you want to configure for search.
4. Click **Save.** The Remote Database is created and displayed on the Remote Database Management page.

   You can now configure the required Database Connections to get the information you want to retrieve from that Remote Database.

> **Note:**
>
> For information about configuring a Database Connection, see **"Configuring a Query" on page 372**.

Configuring a Query

After creating a Remote Database, you can configure Database Queries that the Portal can use to spider, and index Remote Database content in addition to the standard Knowledge Spaces content.

To configure a Database Query, carry out the following steps:

> **Note:**
>
> Before configuring the Query, ensure that the Remote database and the tables you want Knowledge Spaces to index are created and available.

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal > Remote DB Search**, the **Remote Database** page is displayed.
2. Click the name of the Remote Database within which you want to configure a Database Query. The **Remote Database Query** page is displayed.

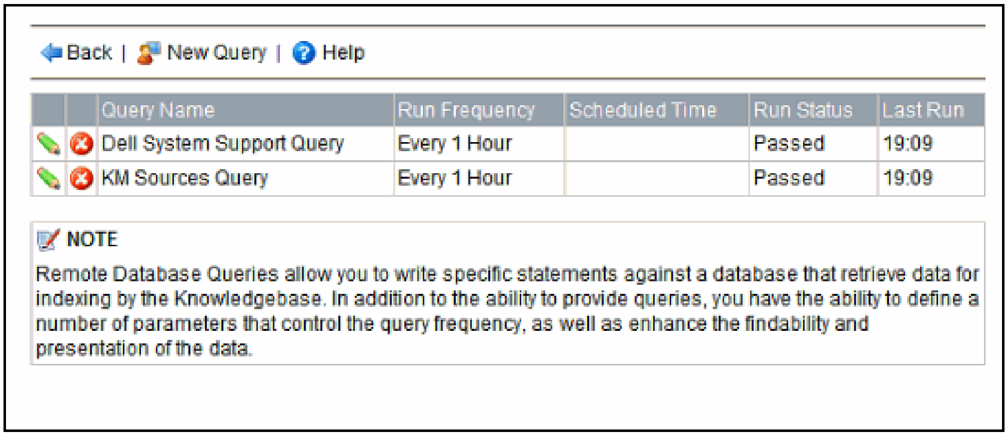


Figure 299 Remote Database Query Page

3. Click 

. The **Database Connection Configuration** page is displayed.

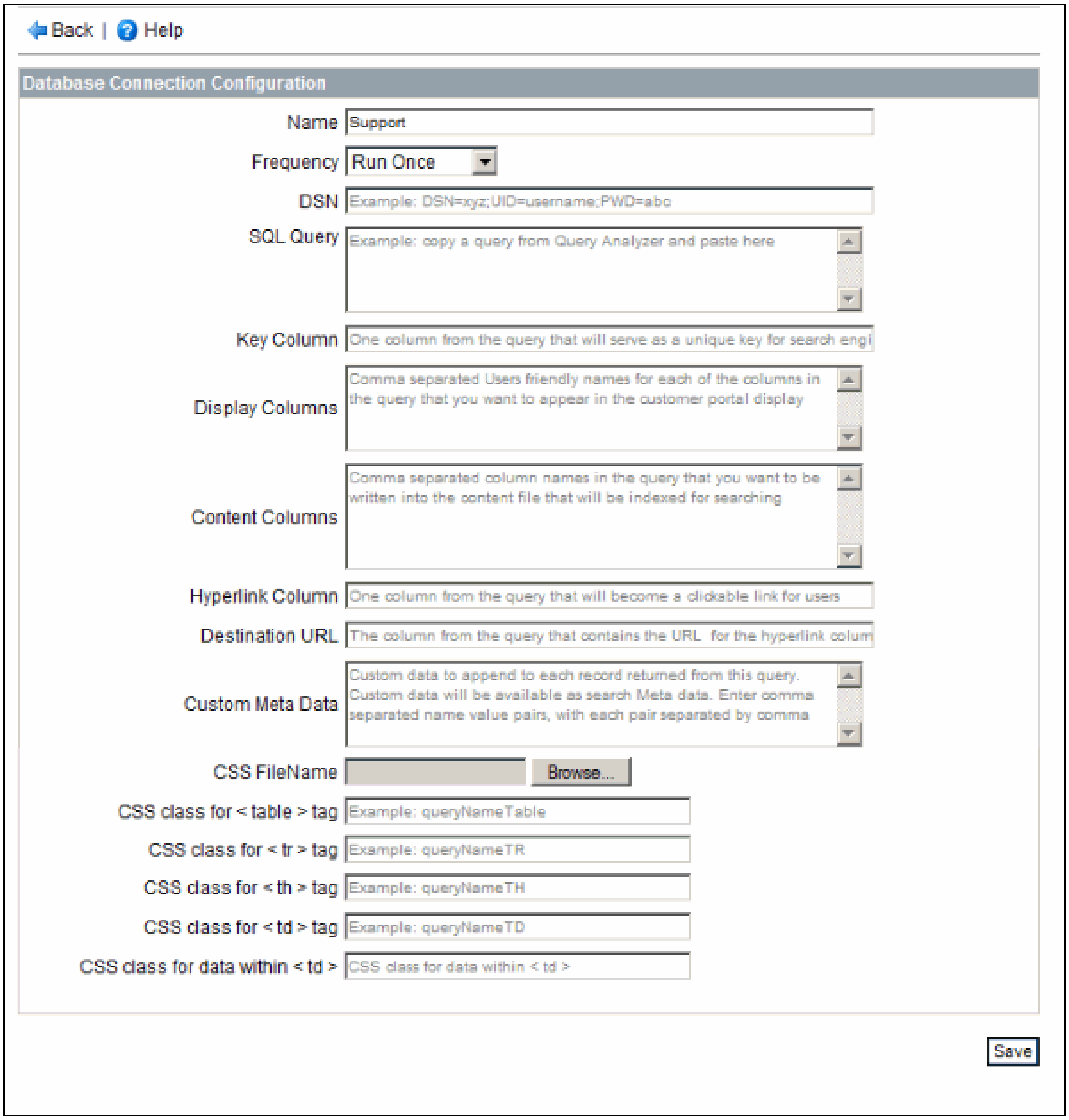


Figure 300 Database Connection Configuration Page

4. In the **Name** field, enter a unique user friendly name for the Database Query.

> **Note:**
>
> This is the name that is displayed to the users in the Customer Portal Search Results page. Hence, the name should be user friendly and make sense to users when viewed amongst many search results.

5. In the **Frequency** field, select the time interval at which the Knowledge Spaces search engine must spider, and index that Remote Database.

6. In the **DSN** field, enter the DSN name, Username, and Password to connect to the Remote Database. For example, **DSN=Vendors;UID=XYZ;pwd=temp**.

> **Note:**
>
> This is the only DSN format that is accepted.

7. In the **SQL Query** field, enter the SQL Query based on the information you want to retrieve from the Remote Query.

> **Note:**
>
> The “Select * from” type of queries does not work. You must creat more specific queries specifiying the column names and the table names. For eg: Select <col1> <col2> from <table>.

8. In the **Key Column** field, enter the name of the Key Column which uniquely identifies the data in the Remote Database.
9. In the **Display Columns** field, enter the names of the Columns in the Remote Database who’s values must be displayed for end results on the Portal.

> **Note:**
>
> The column names you specify in the Display Columns field should match the retrieving column names specified in the SQL Query field.

10. In the **Content Columns** field, enter the names for each Column in the query that you want to be indexed by the search engine.
11. In the **Hyperlink Column** field, enter the name of a Column in the query that you want as a clickable link for the Portal users.
12. In the **Destination URL** field, enter the name of the Column in the query that contains the URL for the hyperlink column.
13. In the **Custom Meta Data** field, enter any custom data that must be associated with each record returned from the query.
14. In the **CSS File Name** field, enter the path of the CSS file to be used to display the Remote Database search content on the Portal.

    - Or -

    Design a customized Style sheet to display the Remote Database content on the Portal by specifying the values in the following fields:

- CSS Class for <table> tag
- CSS Class for <tr> tag
- CSS Class for <th> tag.
- CSS Class for <td> tag
- Css Class for Data within <td>

> **Note:**
>
> The content displayed from Remote Databases is displayed as single records in an HTML table. The above fields enable you to style the HTML table and content displayed within to meet your needs.

15. Click **Save** to save the Database Query configuration.

> **Note:**
>
> The "Run Status" and "Last Run" columns on the Remote Database Queries page indicate whether the query has run, and the last time the query ran, and extracted and indexed content.

Editing the Remote Database Name

The Remote Databases configured are displayed on the Remote Database Management page. You can edit the name of a Remote Database.

To edit a Remote Database Name, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel, click **Portal > Remote DB Search**. The **Remote Database** page is displayed.
2. Click to the left of the Remote Database name. The New Database Content page is displayed.
3. Make the changes.
4. Click **Save**.

Deleting a Remote Database

You can delete an existing Remote Database.

To delete a Remote Database, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel, click **Portal > Remote DB Search**. The **Remote Database** page is displayed.
2. On the left of the Remote Database name you want to delete, click . A confirmation message is displayed.

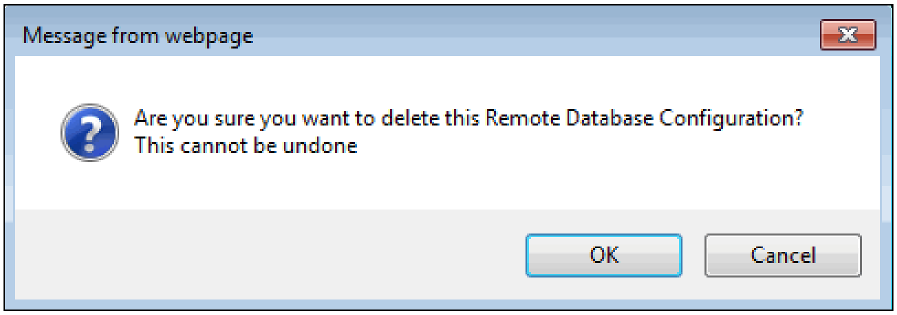


Figure 301 Deleting A Remote Database

3. Click **OK.** The Remote Database is deleted.

Editing a Database Query

You can edit the details of an existing Database Query.

To Edit a Database Query, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel, click **Portal** > **Remote DB Search**. The **Remote Database** page is displayed.
2. Click the name of the Remote Database which contains the Database Query you want to edit. The Remote Database Query Management page is displayed.
3. Click the name of the Database Query you want to edit. The Database Query Configuration page is displayed.
4. Make the changes
5. Click **Save**. The Database Query changes are saved.

> **Note:**
>
> After the Remote Database content is imported into Moxie Knowledge Spaces once, it is recommended that you modify the query for subsequent imports to get only the modified content from the Remote Database.

Deleting a Database Query

You can delete a Database Query is not required.

To delete a Database Query, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel, click **Portal** > **Remote DB Search**. The **Remote Database** page is displayed.
2. Click the name of the Remote Database which contains the Database Query you want to delete. The Remote Database Query Management page is displayed.
3. Click to the left of the Database Query you want to delete. A confirmation message is displayed.

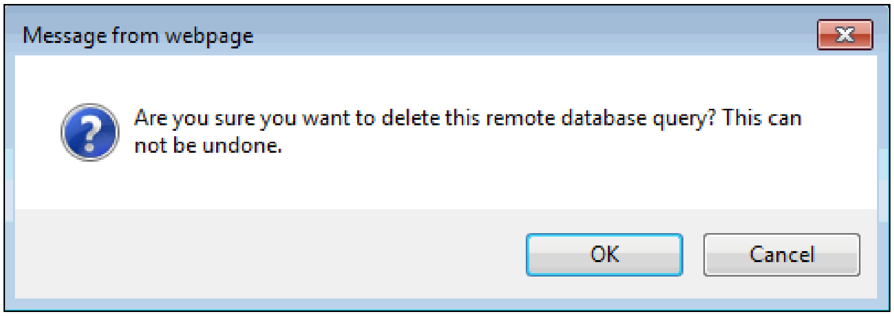


Figure 302 Delete Database Connection Dialog Box

4. Click **OK.**

   - Or -

   Click **Cancel** to cancel the operation.

> **Note:**
>
> When you delete a Remote Database Query, the Remote Database content imported into Knowledge Spaces™ is also deleted.

.

Remote File Search

This chapter provides you with detailed information about configuring Remote File Search in Knowledge Spaces™ Admin Control Panel.

About Remote File Search

You can create a list of File Systems that the Portals can index in addition to the standard Knowledge Spaces content. You must configure the remote File Systems to be available on the Portal, for the Portal users to search in addition to searching standard Knowledge Spaces content. To set up a Remote File System, you must have a single-sign-on account that runs all the Knowledge Spaces applications and Autonomy applications, and has access to the directories that have to be indexed.

Remote File Search is a licensed feature, and can be purchased from Moxie SoftwareTM separately as an add-on module.

The remote files are indexed only if the single-sign-on account which Knowledge Spaces, and the Search Engine Services are configured to use has full control access privileges to the remote File Systems. By default Moxie Knowledge Spaces Service runs using the Local System account. If you configure the service to run using a different account, ensure that the account has full control access privilege to the Remote File Systems as well.

The Remote File Search feature is available for you only if the Remote Site Search option is configured for the Internal Access Profile associated to you.

Creating a Remote File System

You must create the list of File Systems that you want the Portals to index, and search in addition to the standard Knowledge Spaces content.

To create a Remote File System, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal > Remote Files Search**. The **Remote Files Search** page is displayed.
2. Click 

. The **New File System** page is displayed.

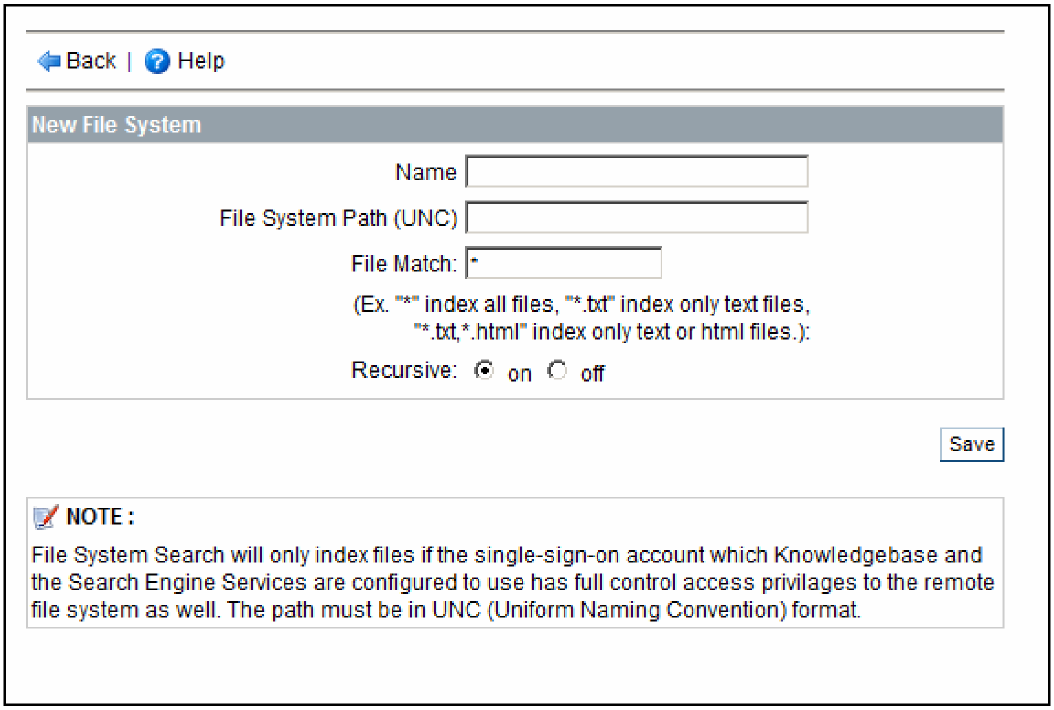


Figure 303 New File System Page

3. In the **Name** field, enter a name for the File System.
4. In the **File System Path** (UNC) field, enter the path where the File System resides. The path must be in the Uniform Naming Convention (UNC) format.

Example:

\\server\directory\subdirectory

---

5. In the **File Match** field, enter the format of the files to be indexed from the File System. Type '*' if you want the Search Engine to index all the files in the File System.
6. In the **Recursive** area, click on to enable the indexing of the **File System** folder, including its subfolders.

   -OR-

   Click **off t**o enable the indexing of only the designated File System folder.
7. Click **Save** to create the new File System

> **Note:**
>
> To enable Remote File Search for a Portal, on the Portal Search Options page associated with the Portal, select the Remote FileSystem Search option, and subsequently select the File Systems to be available on the Portal for search.

Editing a Remote File System

The existing Remote Files Systems are displayed on the Remote Files Search page. You can edit an existing Remote File System.

To edit a Remote File System

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal** > **Remote Files Search**. The **Remote Files Search** page is displayed.
2. Click to the left of the Remote File System name, or click the File System name. The **Edit Remote File System** page is displayed.
3. Make the changes
4. Click **Save**.

Deleting a Remote File System

You can delete an existing Remote File System.

To delete a Remote File System

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal** > **Remote Files Search**, the **Remote Files Search** page is displayed.
2. On the left of the Remote File System name you want to delete, click . A confirmation message is displayed.

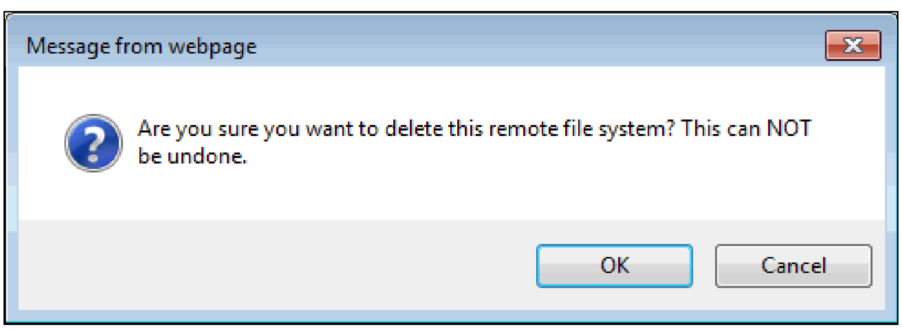


Figure 304 Deleting A Remote File System

3. Click **OK**. The Remote File system is deleted.

Search Optimization

This chapter provides you with detailed information about Search Optimization in Knowledge Spaces™ Admin Control Panel.

Pinned Articles

The **Pinned Articles** enables authorized Internal Users to create Terms, and pin specific Articles to those Terms for the purpose of influencing the search experience of the Portal users.

For the Pinned Articles to be displayed on a Portal, ensure that you have:

- Created the Pinned Articles Term and pinned the Articles.
- Associated the Pinned Articles Term to appropriate Portals.
- Enabled the Pinned Articles feature for the Portals associated with the Term.

When the **Pinned Articles** feature is configured for a Portal, a Portal User when searches for Articles by using the **All Words**, **Any Words**, **Exact Phrase**, or **Natural Language** search type, and the search string specified by the user matches a Pinned Articles Term, the Articles pinned to the Term are displayed at the top of the Portal Search Results page.

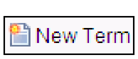
The Pinned Articles are displayed on the Portal regardless of whether they are found by the search engine. This means the Pinned Articles found during a search operation need not contain any of the words or concepts from the user's search to appear in the Search Results, giving tremendous control over guiding the Users to the content they need. Each Pinned Article displayed on the Portal will display the Article's title and the Manual Summary if associated with the Article.

The **Pinned Articles** section on the Search Optimization page of Knowledge Spaces™ Admin Control Panel enables an Administrator to create Terms, and pin specific Articles to the Terms.

> **Note:**
>
> The standard search engine summaries are not available for Pinned Articles displayed on the Portal.

The Non-pinned Articles that match the user's search string are displayed below the Pinned Articles section on the Portal Search Results page.

Creating a Pinned Articles Term

1. In Knowledge Spaces™ Admin Control Panel Home page, Click **Portal** >**Search Optimization,** the **Search Optimization** page is displayed.
2. Click **Pinned Articles**. The **Pinned Articles** page is displayed.
3. Click 

. the **New Term** page is displayed.

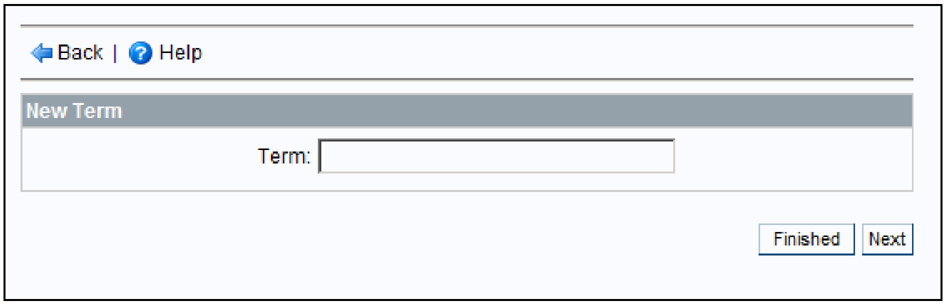


Figure 305 New Term Page

4. In the **Term** field, enter a name for the new Pinned Articles Term.
5. Click **Finished**. The Pinned Articles Term is created.

   -Or-

   Click **Next**. The Pinned Articles Term is created, and the Add Articles page which enables you to pin the Articles to the Term is displayed.

Note:

- To edit the name of a Term on the Pinned Articles Home page, click adjacent to the Term you want to edit. Modify the name of the Term as required, and click **Save**.
- To delete a Term on the Pinned Articles Home page, click adjacent to the Term you want to delete. A message box is displayed prompting you to confirm the deletion. Click **OK** to delete the Term.

Pinning Articles to a Term

1. On the **Pinned Articles** page, click the Term to which you want to pin the Articles. The Term Information page is displayed.

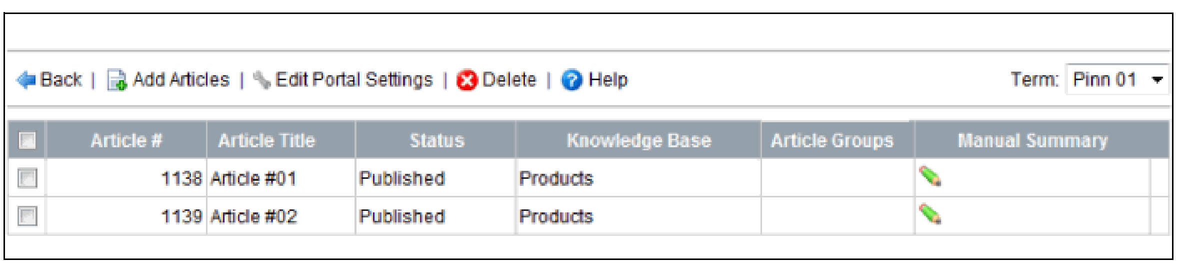


Figure 306 Term Information Page

2. Click **Add Articles**. The **Add Articles** page is displayed.

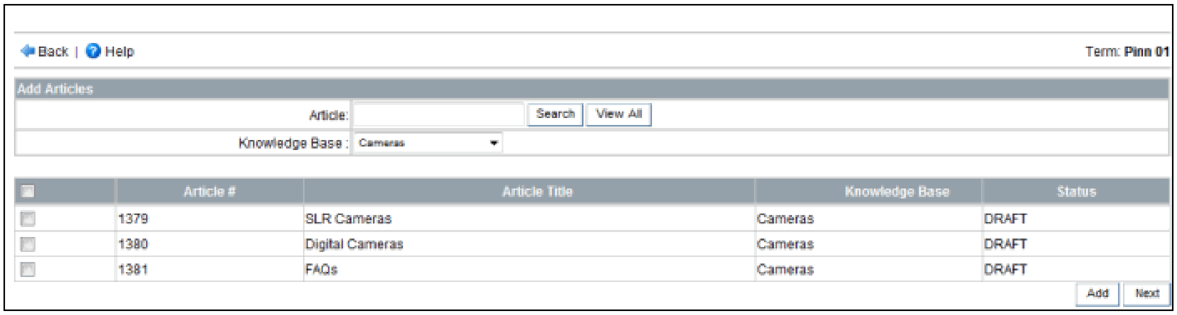


Figure 307 Add Articles Page

3. In the **Knowledge Base** list, select the Knowledge Base from which you want to pin the Articles to the Term.
4. Click **View All**. All the Articles in the selected Knowledge Base are listed on the page.
5. Select the check boxes adjacent to the Articles you want to pin to the Term and click Add.

   -OR-

   In the **Article field,** enter the ID of the Article you want to pin to the Term, and Click **Search**. The Article is listed on the page.
6. Select the check box adjacent to the Article and click **Add.**
7. Click **Next.** The page to associate the Pinned Articles to Portals is displayed.

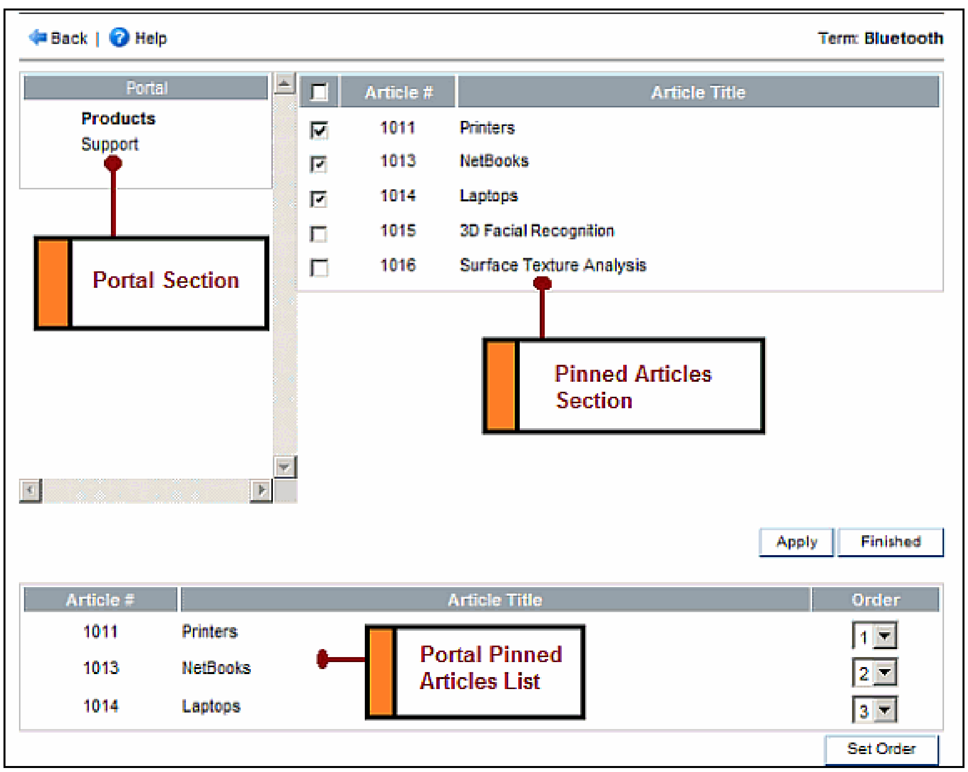


Figure 308 Associating Pinned Articles to a Portal

8. From the **Portal** section, click the Portal to which you want to associate the pinned Articles in the Term. The Articles pinned to the Term, which are present in the Knowledge Bases associated with the Portal are listed in the Pinned Articles section.

9. Select the check boxes adjacent to the Pinned Articles you want to associate to the Portal.
10. Click **Apply**. The selected Articles are displayed in the Portal Pinned Articles list.
11. From the **Order** column, set the Order in which each Article must be displayed on the **Portal Search Results** page.
12. Click **SetOrder**.
13. Click **Finished.** The selected Pinned Articles are associated to the selected Portal.

> **Note:**
>
> - You can also associate the Pinned Articles in a Term to the required Portals, by clicking the Edit Portal Settings option on the Term Information page.
> - You can remove the Pinned Articles from a Term. On the Term Information page, select the check boxes adjacent to the Articles you want to remove from the Term and click . A message box is displayed prompting you to confirm the removal of the selected Pinned Articles from the Term. Click **OK**.The selected Articles are removed from the Term.

Specifying Manual Summaries for Pinned Articles

You can specify Manual summary for an Article pinned to a Term from the Term Information page or from the Articles Properties page of the Article. If the Manual Summary is not specified for a Pinned Article, only the Title is displayed for the Article in the Pinned Articles section on the Portal.

To specify Manual Summary for an Article from the Term Information page, carry out the following steps:

1. On the **Pinned Articles** page, click the name of the Pinned Article Term which is associated with the Article for which you want to specify the summary. The **Term Information** page is displayed.

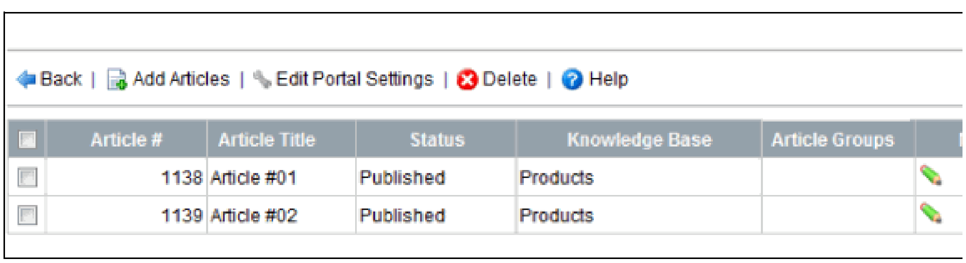


Figure 309 Term Information Page

2. In the **Manual Summary** column, click next to the Article for which you want to specify Manual Summary. The **Manual Summary** page is displayed.

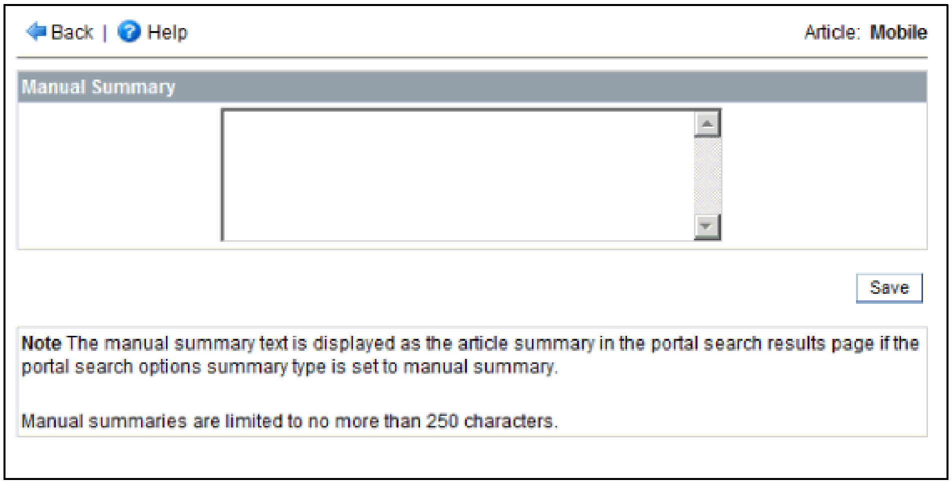


Figure 310 Manual Summary Page

3. Type the synopsis for the Article.
4. Click **Save** to associate the synopsis with the Article.

Displaying Pinned Articles on a Portal

The Portal Search Options page includes the Pinned Articles feature which enables you to configure the display of Pinned Articles associated to the Portal.

To display the Pinned Articles on a Portal, ensure that you have:

- Created the Pinned Articles Term and pinned the Articles.
- Associated the Pinned Articles Term to appropriate Portals.
- Enabled the Pinned Articles option for the Portals associated with the Term.

When you configure the **Pinned Articles** feature for a Portal, a Portal user when searches for Articles by using the **All Words, Any Words**, **Exact Phrase,** or Natural Language search type, and the search string specified by the user matches a Pinned Articles Term, the Articles pinned to the Term are displayed at the top of the Portal Search Results page. Each Pinned Article displays the Article's title and the Manual Summary if associated with the Article.

When you enable the Pinned Articles option for a Portal, the Max Articles/Term list is displayed. This list enables you to select the maximum number of Pinned Articles to be displayed on the Portal. You can set a value from 1 through 25.

The following figure shows the Pinned Articles listed on the **Search Results** page of a Portal:

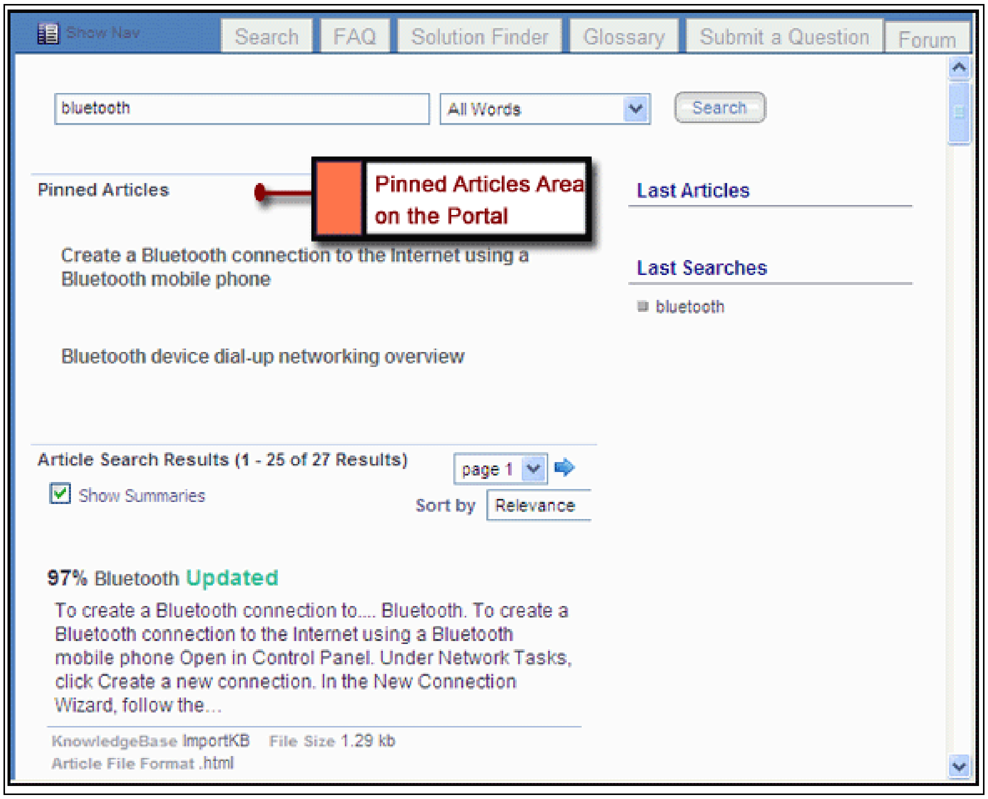


Figure 311 Pinned Articles Area on the Portal

AdManager

This chapter provides you with detailed information about creating, and managing Advertisements in Knowledge Spaces™ Admin Control Panel.

About AdManager

The AdManager engine enables you to create graphic or textual advertisements to be generated in the search results page on one or more Portals.

You can determine the context in which advertisements are delivered through the addition of keywords on a campaign by campaign basis.

Reporting is available through the **Reports** tab that shows number of impressions and clicks, as well as the click-through rate which assists you in determining each campaigns success.

Note:

You must be granted the **Upsell Campaign** permission to access the AdManager page.

KB AdManager is included with the Knowledge Spaces™ Enterprise edition, and also available for purchase as a separate module from Knowledge Spaces™ Professional Edition.

On the Portal tab, click **AdManager** in the left pane. The AdManager page is displayed.

Figure 312 AdManager Page

Creating a New Advertisement

You can create new Advertisements using the AdManager engine.

To create a new advertisement, carry out the following steps:

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal** > **AdManager**, the **AdManager** page is displayed.

2. Click the 

The **New Advertisement** page is displayed.

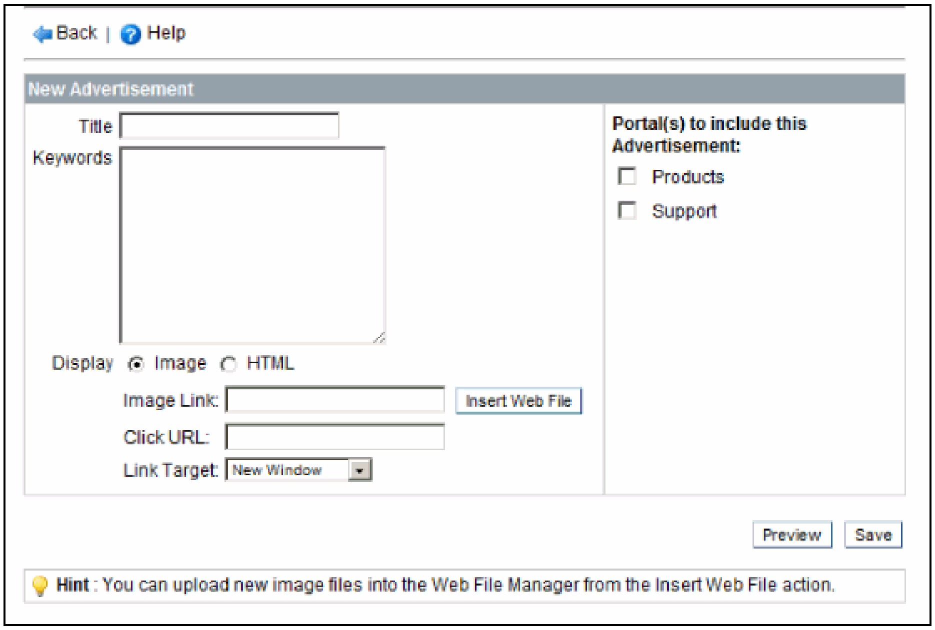


Figure 313 New Advertisement Page

3. In the **Title** field, type a title for the Advertisement.
4. In the **Keywords** area, type the keywords that will activate the Advertisement to appear on the Portal Search result page.
5. Select the type of display for the Advertisement.

   If you have selected Image as the display type:
6. In the **Image Link** field, specify the path of the image file.

   - OR -

   Click **Insert Web File**. The **Web File Manager** window is displayed.
7. Double-click the Advertisement image, the path of the image is displayed on the Image Link field.
8. In the **Click URL** field, specify the URL that you want External Users to be taken to.
9. Set the Link Target to either launch a new browser or use the existing browser instance.

   If you have selected HTML as the display type:
10. Type either plain text or HTML into the field.
11. Basic HTM, and CSS references are acceptable.
12. Select the Portal(s) that you want the Advertisement to be available to.
13. Click **Preview**. A preview of the Advertisement is displayed.
14. Click **Save**. The Advertisement is created.

> **Note:**
>
> - External Users of the selected Portals will receive the Advertisement alongside their search results each time they use a keyword that matches your settings. Each delivery of an Advertisement is an Impression.
> - External Users can either use the search results as usual or click on an advertisement which records a click through

Editing an Advertisement

You can edit an existing Advertisement.

To Edit an Existing Advertisement

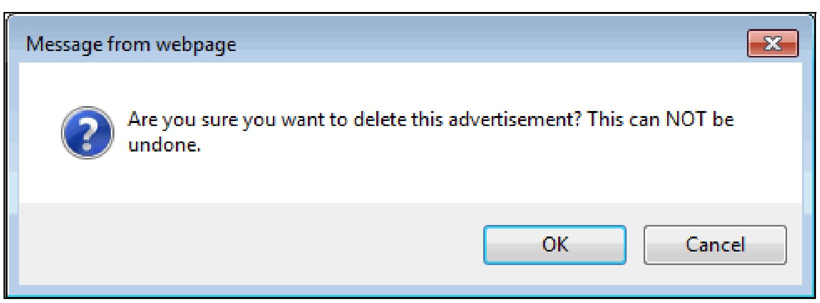
1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Portal> AdManager**. The **AdManager** page is displayed.
2. Select the **Advertisement** to edit the details. The **Edit Advertisement** page is displayed.
3. Make the changes in the **Edit Advertisement** page.
4. Click **Preview**. A preview of the Advertisement is displayed.
5. Click **Save**. The Advertisement information is saved.

Deleting an Advertisement

You can delete an Advertisement.

To Delete an Advertisement

1. In the Knowledge Spaces™ Admin Control Panel page, click **Portal** > **AdManager**, the **AdManager** page is displayed.
2. Click next the Advertisement you want to delete. You are prompted with the following message.



3. Click **OK**. The Advertisement is deleted.

   - OR -

   Click **Cancel** to cancel the operation.

Chapter 4:Administration

This chapter provides you with detailed information about Workflow Editor in Knowledge Spaces™ Admin Control Panel.

In this chapter

About Workflow Editor

The Workflow Editor section of KB Administrator provides a management protocol for the Knowledge Base Article submission, and approval process and an interface to set employee Workflow permission status.

You can create a unique Workflow process with a unique set of Workflow steps, and Workflow participants for each Knowledge Base.

The Workflow Editor section enables you to set and manage the progression of an Article from the point of inception, through a set review process, to the point where the Article is published to the Knowledge base, and becomes available to the Portal users.

Note:

You must be granted the **Workflow Editor** permission to access the Workflow Editor Home page.

Why Have a Workflow Editor?

The Workflow Editor assures Article validity and uniformity after the Articles reach the users through the Knowledge Base. The Workflow Editor provides a series of checks and balances, ensuring that the Articles are totally up to your standards before they are published to the Knowledge Base.

Example

You can configure the following Workflow steps:

Draft - The author of the Article keeps the Article in the draft status until the author has finished with the Article and ready to send it to the next step.

Editor - After the Article author submits the Article, the Article moves to the editing step, where an editor reviews the Article, edits it, and makes any necessary corrections to content, or grammar.

Legal - When the editor approves the Article, it is sent to the legal department for approval. The legal department reviews and approves the Article if it conforms to the company's legal requirements.

Published - After the legal department approves the Article, it reaches published status, and is made available to the KB Portal Users.

How to Use the Workflow Editor

On the Workflow Editor page, there is a list of the existing Workflow processes, and a button to create a new Workflow process. There is a Workflow established by default.

Creating a New Workflow Process

You can create a new Workflow Process and assign it to a Knowledge Base.

> **Note:**
>
> You must be granted the **Create New Workflow** permission to create new Workflows in Knowledge Spaces™.

To Create a New Workflow Process

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration** > **Workflow Editor,** the **Work Flow** page is displayed.

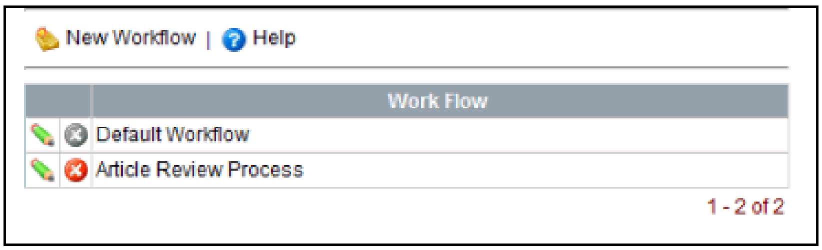


Figure 314 Work Flow Home Page

2. Click the  . The **New Workflow** page is displayed.

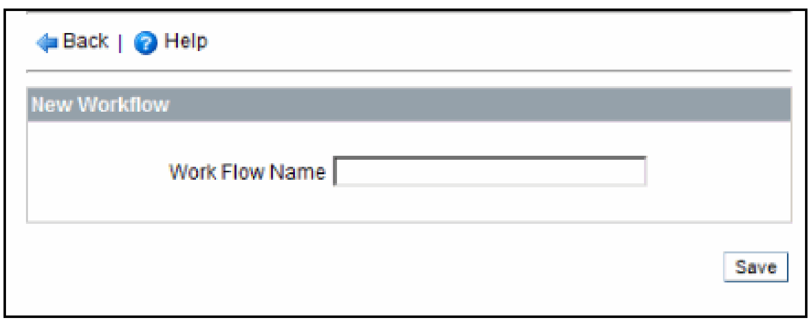


Figure 315 New Workflow Page

3. In the **Workflow Name** field, type a name for the new Workflow.
4. Click **Save**. The Workflow is created.

Renaming a Workflow

You can edit the name of a Workflow.

> **Note:**
>
> You must be granted the **Edit Workflow** permission to edit the name of a Workflow.

To Rename a Workflow

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration** > **Workflow Editor**, the **Work Flow** page is displayed.
2. Click next to the Workflow name you want to rename. The **Edit Workflow** page is displayed.

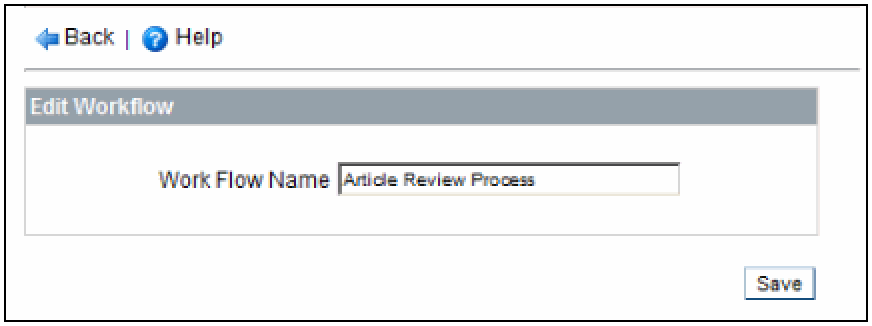


Figure 316 Edit Workflow Page

3. In the **Workflow Name** field, type the new name of the Workflow.
4. Click **Save**. The Workflow is renamed.

Deleting a Workflow

You can delete the Workflow processes in Knowledge Spaces™.

> **Note**
>
> You must be granted the **Delete Workflow** permission, to delete a Workflow Process.

To Delete a Workflow Process

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration** > **Workflow Editor**, the **Work Flow** page is displayed.
2. Click to the left of the Workflow Process you want to delete. You are prompted with the following message.

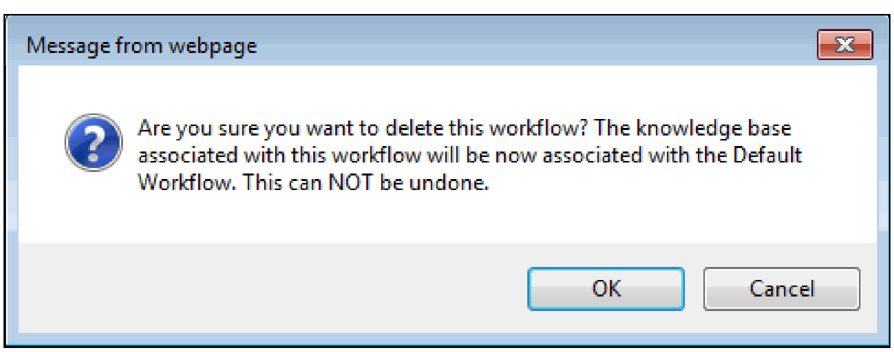


Figure 317 Delete Workflow Confirmation Dialog Box

3. Click **OK** to confirm the deletion of the Workflow Process.
   - OR -
   Click **Cancel** to cancel the operation.

> **Note:**
>
> - You cannot delete the **Default** Workflow process.
> - A Workflow with Articles in it cannot be deleted.

Adding a New Workflow Step

You can add a New Workflow Step only if you are granted the **Create New Workflow Step** permission in Knowledge Spaces™ Admin Control Panel.

To Add a New Workflow Step

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration > Workflow Editor,** the **Work Flow** page is displayed.
2. Click the Workflow process within which you want to add a Workflow Step. The Workflow editor page with the Workflow steps of the selected Workflow is displayed.
3. Click 

. The **New Workflow Step** page is displayed.

Figure 318 New Workflow Step Page

4. In the **Workflow Step Name** field, type the name of the new step that you are adding. For example, Manager.
5. After you add the new step name, you must choose the location of the new step in the Workflow progression.
6. Below the **Workflow Step Name**, use the list to select a step. The New step will be places after the step that you select in the list. For example, to place the Manager step directly after the draft step, select **Draft.**

7. Click **Save**. The new step appears on the proper location in the Workflow process on the **Workflow Editor** page.

Editing a Workflow Step

Editing a Workflow includes two options:

- Changing the name of the Workflow Step.
- Change the placement of the Workflow step in the Workflow process.

> **Note:**
>
> You must be granted the **Edit Workflow Step** permission to edit a Workflow step within a Workflow process.

To Edit a Workflow Step

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration** > **Workflow Editor**, the **Work Flow** page is displayed.
2. Click the Workflow process within which you want to edit a Workflow Step. The Workflow editor page with the Workflow steps of the selected Workflow is displayed.
3. In the **Workflow Diagram** area, click the Workflow step icon.

   - OR -

   In the **Workflow Step** area, click the Workflow step name. The **Edit Workflow Step** page is displayed.

Figure 319 Edit Workflow Step Page

4. In the **Step Name** field, type the new name of the Workflow step.
5. When you have typed in the new name, click **Save**. The new name displays on the main Workflow Editor page.
6. Below the **Workflow Step Name**, use the list to select a step. The New step will be placed after the step that you select in the list. For example, to place the Manager step directly after the draft step, select **Draft**.
7. To change the placement of this Workflow Step in the Workflow process, use the list below the **Step Name** field and select a step after which the edited step must be placed.
8. Click **Save**.The Workflow step is edited.

Deleting a Workflow Step

You can delete the Workflow steps in Knowledge Spaces™ Admin Control Panel.

> **Note:**
>
> You must be granted the **Delete Workflow Step** permission, to delete a Workflow Step.

To Delete a Workflow Step

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration** > **Workflow Editor,** the **Work Flow** page is displayed.
2. Click the Workflow process within which you want to delete a Workflow Step. The Workflow editor page with the Workflow steps of the selected Workflow is displayed.
3. Click to the left of the Workflow Step. A confirmation message is displayed.

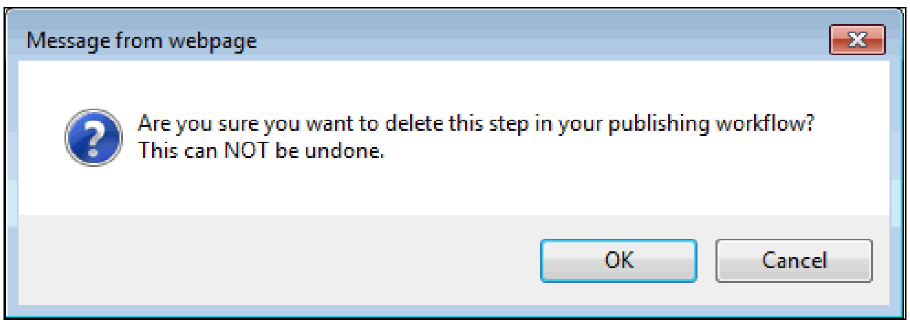


Figure 320 Delete Workflow Step Confirmation Dialog Box

4. Click **OK** to confirm the deletion of the Workflow Step.
   - OR -
   Click **Cancel** to cancel the operation.

> **Note:**
>
> - You cannot delete the following default steps: **Published**, **Draft**, and **Expired**.
> - You cannot delete the Workflow steps with Articles within the steps.

Setting Employee Permissions in the Workflow Editor

After you create new or use the default Workflow Steps, you must decide which individuals can have the authority to use step approval process. You can set these permissions using the **Permissions** button at the top of the Workflow Editor Home page.

.

Note:

You must be granted the **Workflow Permissions** permission to select the Users for the step approval process.

Example:

If John Smith works in the Legal department and you have a Legal step before the Published step, you might want to give John Smith authority to approve the Article from Legal to Published. You can grant approval status based on job function.

In the **Permissions** area, you can see a list of employees who have access to Knowledge Spaces™ Admin Control Panel where you can set the approval levels for each employee.

When you log on to Knowledge Spaces™ Admin Control Panel, you can see a list of Articles that are pending approval. From the Knowledge Spaces™ Admin Control Panel Home page, you can connect to each pending Article, and view/edit/approve the Article based on your permissions.

If an employee approves the Article, and moves the Article to the next step in the approval Workflow, the Article appears on the Home page of the employee(s) who have the authority to approve the next step.

In the **Permissions** area, you can grant multiple employees the ability to approve a single step

Tip:

An Article cannot become live in the Knowledge Base until all the Workflow steps are approved. Think carefully about how many steps are necessary and which employees can approve each step. An insufficient Workflow process can result in faulty or incomplete Articles in the Knowledge Base, but a Workflow process that has too many steps and too many employees requiring approval can delay the publishing and approval process of the Articles.

Setting User Permissions

The **Permissions** section of the Workflow Editor interface allows you to assign permissions to approve Articles through the various Workflow Steps.

In the **Permissions** section, you can see a list of Internal users. When you select a user, you can see a list of the workflow steps, with each step, there is a series of three icons with three check boxes for each step.

Each Internal User you created displayed in the **Permissions** section. When you add an Internal User, the User is also added to the Permissions section. If you remove an Internal User, the User is also removed from the Permission section.

Under each Workflow step, there are three items:

View - Enables the user to see or read the Articles at a certain Workflow step.

Create Version - Enables the user to edit or make changes to an Article in a certain Workflow step.

Move to - Enables the user to move the Article to the next Workflow step, or send the Article back to the previous Workflow step.

If you assign a user with any combination of the above permissions, the user can view, edit, and/or move Articles based on the settings for that Workflow step.

> **Caution:**
>
> If you want a User to edit and/or approve an Article, the User must have read access for that Workflow step. If you do not give the User access to read an Article but give access to edit or move, the User will not be able to edit or approve, since the User cannot view the Article.

> **Note:**
>
> Applying Internal Access Profiles to the Internal Users from the Internal Users area can also control Workflow permissions. For more information, see **“Internal Users” on page 417**.

How do the Users Use Their Permission Settings to Move Articles through the Workflow?

After you have set the Workflow permissions for Internal Users, the Internal Users can view/edit/move Articles that are present in the Workflow steps to the Workflow steps the Users have access.

Each User who logs on to Knowledge Spaces™ Admin Control Panel can view the Articles in the **Article Management** area. The User can only view the Articles in the Workflow Steps that the User has view permission. If the User clicks the title of the Article, the Article Information page is displayed. If you have assigned the User the **Create Version** permission, the User can edit the Article. In the Article Version Status window, the user can approve the Article if permission is granted.

After a user approves the Article, the Article moves to the next Workflow Step, and appears in the Knowledge Spaces™ Admin Control Panel Home page of the Users who can view/edit/move the Article to the next Workflow Step. If you assign a user **Read** access for a certain Workflow step, but do not assign **Write** or **Approve** access, the User can view the Article, but cannot edit or approve the Article. If you assign Users **Read** and **Write** access, the User can view and edit the Article, but cannot approve it to the next Workflow Step.

Example:

You assign an employee in the Legal Department access to read and approve an Article in a Legal Workflow step. When the Article reaches the Legal Workflow step, and the User has logged on to Knowledge Spaces™ Admin Control Panel sees the Article under the **Pending Approval** heading. When the employee clicks on the Article title, the Edit Article window is displayed, and the User can review the Article. The User cannot make any changes to the Article, since the Write permission is not assigned. After the User has reviewed the Article, the User can approve the Article, or send the Article back to the previous Workflow Step. If the User in the Legal Department approves the Article, it moves on to the next Workflow step. For example, the next Workflow step after Legal is Live. If the Article is approved by the Legal Department, the Article becomes **Published** in the Workflow, and is now accessible to the Users of the Knowledge Spaces.

You can give multiple Users access to read/write/approve an Article in a certain Workflow Step. The Article is in the pending approval state in the Knowledge Spaces™ Admin Control Panel Home page of each User until it is approved by all the Users involved.

Notification

The Notification section of the Workflow Editor enables you to send notification Email messages to recipients when an Article moves to a certain Workflow Step.

Use the Notification area to alert your Knowledge Spaces authors, editors, managers, and any other individuals who are taking part in the Article review Workflow process, when an Article moves into a Workflow Step where they have the authority to perform an approval.

Note:

You must be granted the **Notification** permission to send notification Email messages to recipients when an Article moves to a certain Workflow Step.

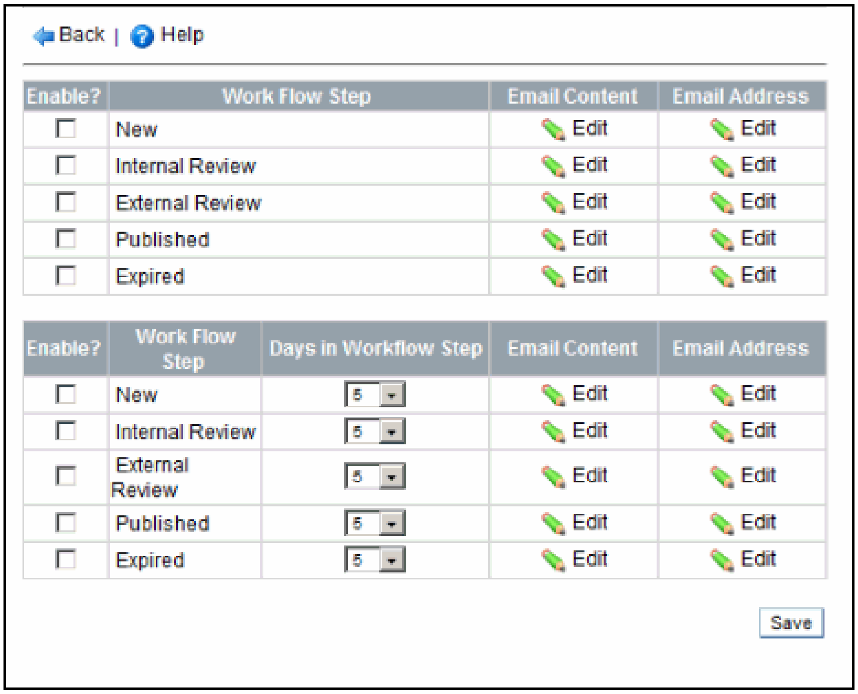


Figure 321 Sample Notification Main Page

The existing workflow steps are displayed in the Notification page. For the workflow steps that you want to enable notification, select the workflow step and click **Save.**

To edit the content of the Notification Email, click the **Edit** link in the **Email Content** column next to the Workflow Step that you want to edit.

To add or edit Email recipients of the Notification Email, click the **Edit** link in the **Email Address** column next to the Workflow Step where you want to choose recipients.

Email Template for Notification

You can customize the subject, and content of the Notification EmailEmail that is sent out when an Article moves into a Workflow Step.

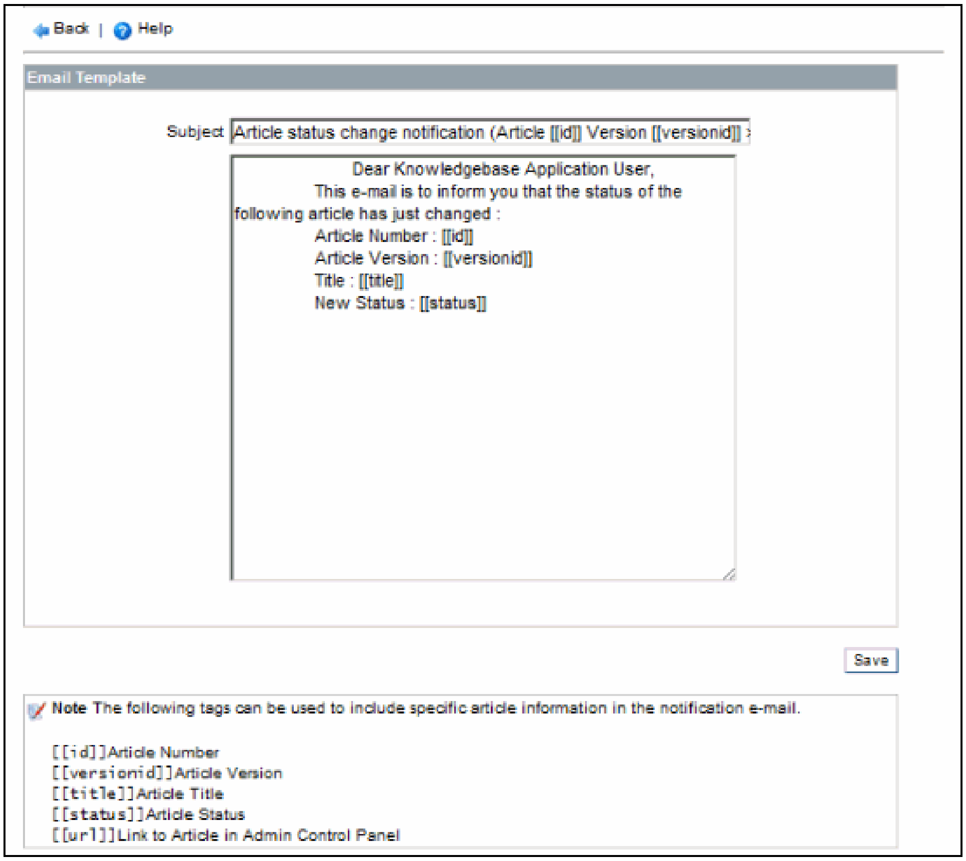


Figure 322 Sample Email Template Page

Type your changes and new content in the fields and the form provided. Click **Save**.

Use the following tags to include specific Article information within the Notification email:

- [[id]] : Article Number
- [[versionid]] : Article Version
- [[title]] : Article Title
- [[status]] : Article Status
- [[url]] : Link to Article in Admin Control Panel

> **Note:**
>
> Only the tags listed above can be used in this Email Template.

E-mail Recipients

The Email Recipients are the users who receives Email Notification when the Articles move into the Workflow Steps.

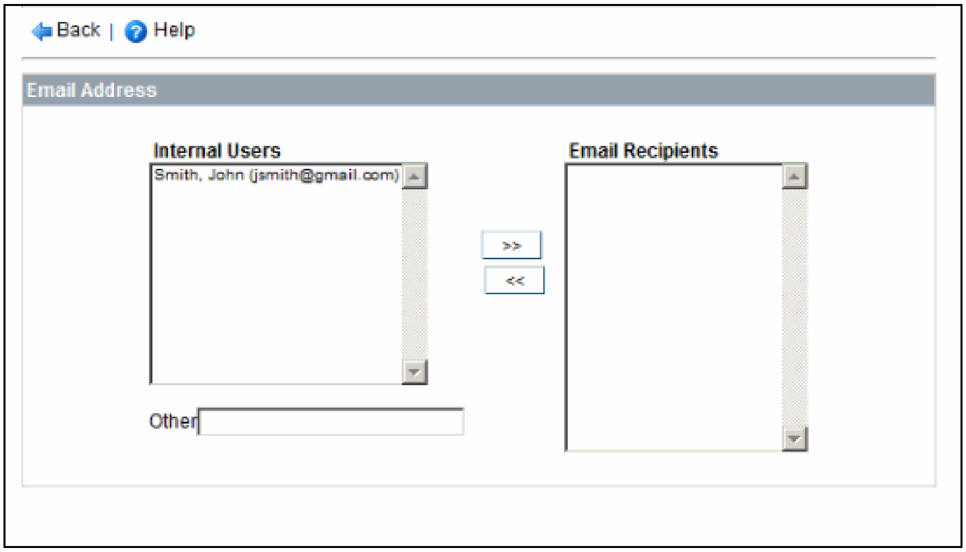


Figure 323 Sample Email Address Page

When you add an E-mail address, the Notification Email is sent to the Email address mentioned in the Email Recipients box each time when an Article moves into the Workflow Step.

The names and email addresses of all the Internal Users are displayed in the **Internal Users** field. If you want to add one or more of these email addresses to the **Email Recipients** list, click the name and click >> to add the E-mail address to the list.

If you want to remove an Email address that you have added, click the E-mail address in the **E-mail Recipients** area, and click << **t**o remove the address.

If you want to add an E-mail address that is not in the **Internal User** list, you can add the E-mail address in the **Other** text field. Type the E-mail address that you want to add to the recipient list, and then click >>.

About Article Templates

The Article Templates section of Knowledge Spaces™ Admin Control Panel provides you with the tools necessary to build the templates (forms) that are used to create the articles you store in your Knowledge Base.

You are provided with a standard **Default** article template in Moxie Knowledge Spaces. Use this template to create your Article or create your own Article templates that create and hold the shape and format of your Articles. There is no limit to the number of article templates that you can create through this interface.

You can create Article templates online from this area or you can import and use your own HTML Article templates.

Tip:

Importing your own templates gives you the flexibility and freedom to create the template design. Create your Article Templates based on the type of Articles that you are creating in your Knowledge Base. For example, if you have an article that provides a solution to a certain problem, you might want to create an Article Template with two text fields, one field for the text of the problem, and one field for the text of the solution.

When you create a new Article online through the Article Management section of Knowledge Spaces™ Admin Control Panel, you must choose an Article Template from the list of your Article Templates. If you have not created or imported any Article Templates, the only choice is the Default template.

Note:

You must be granted the Article Templates permission to access the Article Templates Home page in Knowledge Spaces™ Admin Control Panel.

5. On the **Administration** tab, click Article Templates in the left pane. The Article Template page is displayed.

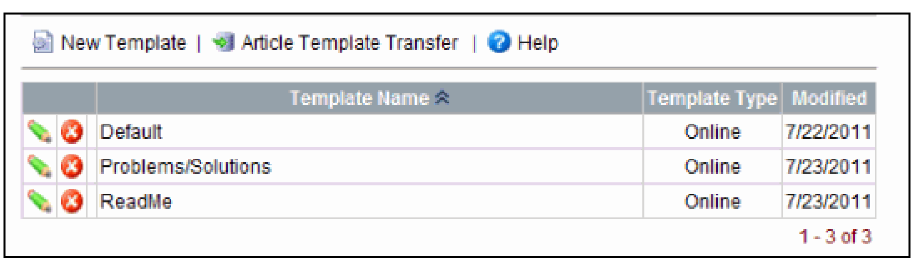


Figure 324 Article Template Home Page

Using the Article Template Functions

On the Article Template page, click the **New Template** button to create a new article template. The Article Templates on the Article Template page are listed alphabetically by name.

In the main frame of the page, there is a listing of article templates. The article templates are displayed alphabetically by name. To the right of the page, the template type, and the latest modification date/ creation dates of the templates are displayed. If you want to sort by date or type instead of name, click the **Modified or Template Type** links at the top of the list of dates. The templates are now sorted by date or type. If you want to change the listing back to the alphabetical listing, click the **Template Name** link above the listing of template names, and the templates go back to the alphabetical listing. The **Template Type** column displays whether the template is imported into the system (template file), or created online within the system.

Creating a New Template

You can create or import a new Article Template.

The new Article Template can be created using two methods:

- Upload a Template.
- Create Online.

> **Note:**
>
> You must be granted the **Create New Article Template** permission to create a new Article in Knowledge Spaces™ Admin Control Panel.

Uploading a New Article Template

To upload a new Article Template, carry out the following steps:

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration >Article Templates**. The **Article Template** page is displayed.
2. Click New Template. The **New Article Template** window is displayed.

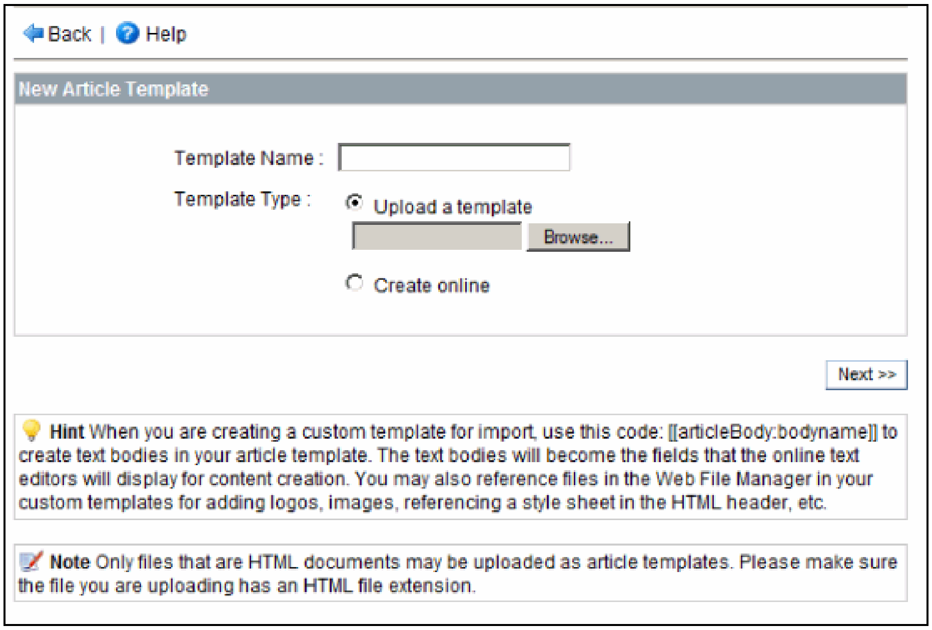


Figure 325 New Article Template Page

3. In the **Template Name** field, type the name of the Article Template.

> **Note:**
>
> For clarity, name the templates after the intended use and format. For example, if the template is intended to create articles that provide solutions for a particular problem, you can call the template Problem/Solution.

4. Select **Upload a Template.**
5. Click **Browse**.
6. Browse your system and choose the template that you want to upload. When you upload a new custom template, it must have the **.html** extension. Any other file extensions will not work.

> **Note:**
>
> You can build your own custom HTML Article Template and then upload the Template in to Knowledge Spaces.

7. Click **Next** to complete the file upload process.

Building a Custom HTML Article Template

As a customer of Knowledge Spaces™ 9.4, you can customize article templates by adding custom HTML or JavaScript code into them to suit your preference.

> **Note:**
>
> Moxie Software™ does not provide support or assistance with CSS or JavaScript in Portal customization areas, widgets, or HTML Article Templates. Inclusion of any custom CSS or JavaScript code and maintenance or troubleshooting of custom code becomes the sole responsibility of the customer.

Adding text bodies in the template - You must create the text bodies in your Template where the article text is entered. You can have as many fields as you like. For example, you can create two fields, Question, and Answer.

When you are creating your Template text bodies, you must use the following code in your Article template to create and embed the bodies:

[[articleBody:bodyname1]]

[[articleBody:bodyname2]]

Or for Example:

[[ArticleBody:Question]]

[[ArticleBody:Answer]]

[[ArticleBody:References]]

If you want to make any of the Template text body fields as required (the author cannot create an article without filling out the field), you can do so by adding the following tabs for your template text bodies:

[[ArticleBody:bodyname1,required]]

For Example:

[[ArticleBody:Question,required]]

If you want to display the Article Template Body Title in an Article, you must include the displayTitle string in the [[articleBody]] tag of the Article Template you use to create the Article.

[[articleBody:bodyname1,required,displayTitle]]

For Example:

[[articleBody:Question,required,displayTitle]]

Adding images in the Template - If you want to place images into the Template, you must either upload the images in to the Attachment Library or the Manager. Images uploaded into the Attachment Library can be called using an image tag as shown below, images called from the Manager require a standard HTML <IMG> tag.

If you want an Article on the Portal to list other Articles that are conceptually similar to the Article, you must include the **AutoRecommend** tag in the article template used to create the Article

The Auto Recommended Articles are listed on the Article Display page on the Portal only if the Auto Recommended feature is enabled for the Portal.

In the proper location in the HTML file that comes with your Template, carry out the following procedure:

1. From the **Attachment Library,** choose the file number of the image that you want to embed in the Article.
2. At the location where you want the image to appear, type: [[image:nnn]] where nnn = the actual number of the Attachment.

   - OR -

   At the location where you want the image to be displayed, type <img src="image_file_path">, where the image file path is copied from the Manager, after selecting the desired image.
3. Save your template file with a **.html** extension.
4. Follow the same process as previously used to upload a template file.

Creating an Article Template Online

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration >Article Templates**, the **Article Template** page is displayed.
2. Click 

, the **New Article Template** window is displayed.

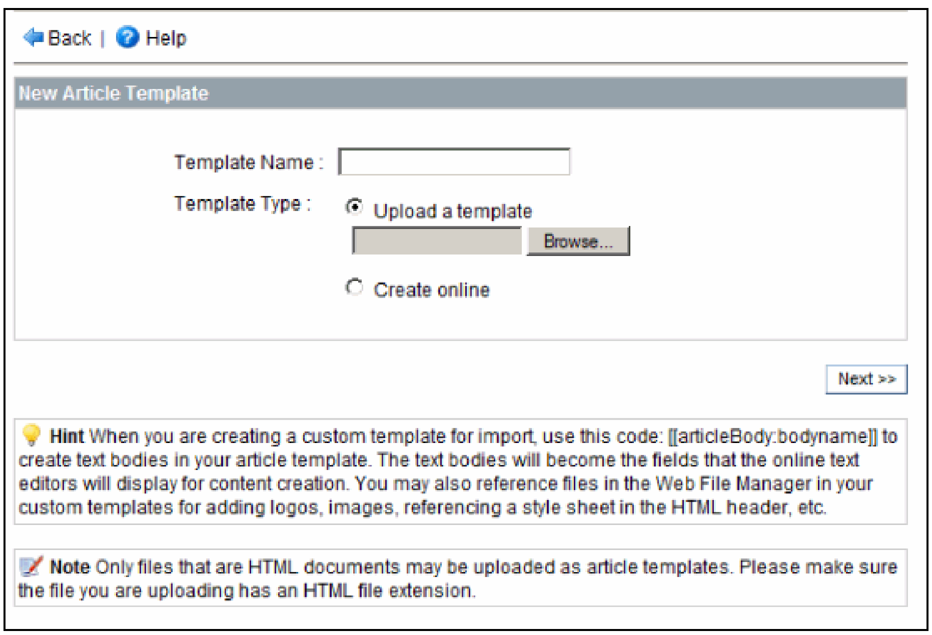


Figure 326 New Article Template Page

3. In the **Template Name** field, type the name of the Article Template.
4. Select the **Create Online** option, and click **Next**. The **New Article Template** page with the text body area in it is displayed.

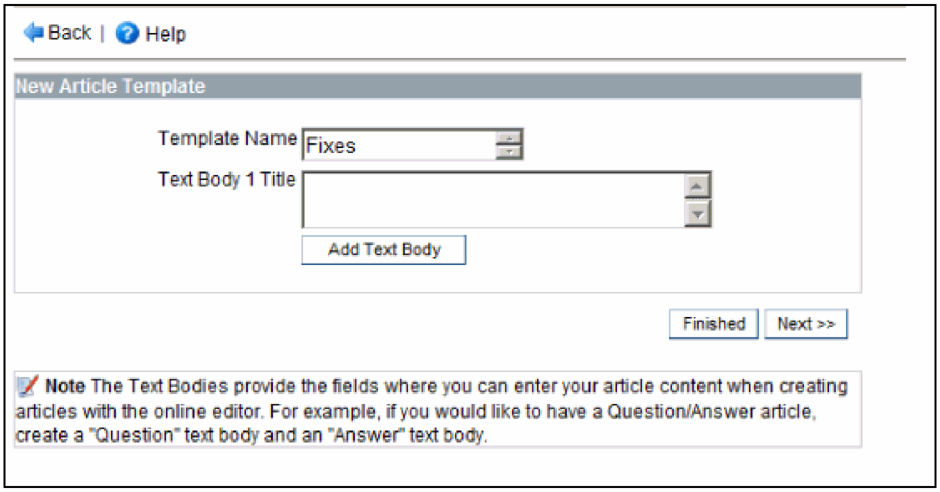


Figure 327 New Article Template Page with the Text Body Field

The next step in the process is to add text bodies. A text body provides the physical space where you can type or paste a new Article.

While each Article Template must have at least one text body, you can create multiple text bodies. When you are creating a new Article in Article Management and are using an Article Template that has multiple text bodies, each text body shows up as a unique field in the Edit Article section.

5. In the field below the Template Name, type the name of the text body.
6. Click the **Add Text Body** and you see the text body title that you have created.

   You can now add additional text bodies by following the same process. After you add the first text body, the new text body field appears. If you want to add a second text body, type the name of the second text body in the new field and click the Add Text Body button again. Repeat the process to add more text bodies.
7. If you want to change the name of a text body that you just created, type the new name in the **Text Body** field.
8. When you are done creating the Text Bodies, click either the Next button, or Finished.
   - Clicking **Next,** the Template Style page is displayed.You can modify the format and style of the template.
   - If you want to use the default style (standard text and format), click **Finished,** the new Article Template is complete.
9. To remove a text body, click next to the text body you want to delete and the text body is removed.

> **Note:**
>
> You can modify the Article Template page. however, you cannot change article Body names or the number of article bodies in a template.

About Multiple Text Bodies

Multiple text bodies in Templates enables you to organize and structure the Article content in the Template for certain types of Articles. Multiple text bodies appear as listed items in the Article Management Preview.

Example:

Reviewing the Problem/Solution Article Template example. This template is intended to provide a specific solution to a specific problem. Create one text body called Problem and one text body called Solution. When you are entering the content in the Edit Article field, you can see two template fields, Problem and Solution. You can type the problem and the solution in their respective fields and preview the article using the Preview feature. Since text bodies appear as listed items, the article appears as follows:

Problem

Here is the text of the problem

Solution

Here is the text of the solution

Template Style

The Template Style window enables you to customize the features of the Article Templates, such as font, text color, bold face print, etc.

Use the Template Style features to create Article Templates that allow colors and other format features to be integrated into your Articles when they are displayed to your Knowledge Spaces Users.

In the Preview page, you can see the article colors, font type, etc. The Article Template you chose to create your Articles determines the text and style features that are displayed in the article.

Using the Template Style Features

When you are selecting your Template Style features, you can choose several options. The template popup window consists of three sections:

- A listing of your text bodies on the left hand side of the window
- Various style option menus on the right hand side of the window
- A sample text box on the bottom of the window.

You can click and modify the text bodies, style options, and modify the styles.

After you have selected a text body for adding style modifications (if you are using the default), you can see the name of the text body listed in bold face at the top of the right hand window.

Below the name of the text body are a number of style options.

> **Note:**
>
> When you change style options, the sample text at the bottom of the window changes to match your style selection. This feature enables you to preview the text styles before you complete the article template and use it for article creation. The style options are:
>
> - **Display Title** - Select **Yes** or **No** to display the text body title. If you choose **Yes** to display the title, the title appears in the actual text of the article as a bulleted point above the text that is entered into the text field. If you choose **'No'** not to display the text body title, the text appears in the article but the text body title are not displayed.
> - **Font Size** - This menu allows you to select the font size of the text in your article. The font size can vary from 8 pt to 36 pt.
> - **Font Face** - This menu allows you to choose the font type for your article.
> - **Bold/Italics/Underline** - This menu allow you to set any combination of bold, italic, or underline type settings for the text of your article.
> - **Color** - This menu allows you to choose the text color of the article text that is created in this text body.
> - **Background Color** - This menu allows you to select the background color of this text body.

Next to the text and background color menus are additional fields. They display the color code for the chosen color. If you want to use a color that is not listed in the menu, choose Other and enter the color code for the new color in the text box next to the text or the background box.

When you have completed your text body style selections for your article template, click **Save** to save your changes and complete the article template. You can modify the style settings of any template by clicking on the template name from the main Article Templates page.

Editing a Template

You can edit an existing Article template.

> **Note:**
>
> You must be granted the **Edit Article Template** permission to edit an Article Template.

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration >Article Templates**. The **Article Templat**e page is displayed.

2. Click to the left of the Article Template you want to edit.

- OR -

3. Click the name of the **Article Template** in the **Template Name** column.

   The **Template Information** page with the details of the Article Template is displayed.
4. Modify the Article Template.
5. Click **Save.** The Article Template is modified.

Replacing an Uploaded Template

If you are uploading a new template to replace an existing template, the new template updates all the articles so you do not have to go back and edit the articles individually.

Caution:

If you delete a template and then re-add the template, the automatic update of Articles does not work.

Note:

- You must be granted the **Upload Article Template** permission to upload Article Templates into Moxie Knowledge Spaces.
- You cannot edit a template that you originally imported in to the system. You must download the template on your local machine, edit and upload it with the changes. To download the template, click the download icon to the left of the template name.
- You cannot edit the names of article body fields.
- You can click the Article Template Transfer option on the Article Template page to update all the articles with the modified or new Article Template. When you click the **Article Template Transfer** option, the Template Transfer schedule task is initiated, which updates all the articles with the modified Article Template.

Deleting a Template

You can delete Article Templates in Moxie Knowledge Spaces.

> **Note:**
>
> You must be granted the **Delete Article Template** permission to delete an Article Template in Moxie Knowledge Spaces.
>
> The Article cannot be edited, if you delete the Article Template associated with it.

To Delete an Article Template

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration >Article Templates**. The **Article Template** page is displayed.
2. Click next the Article Template you want to delete. A confirmation message is displayed.

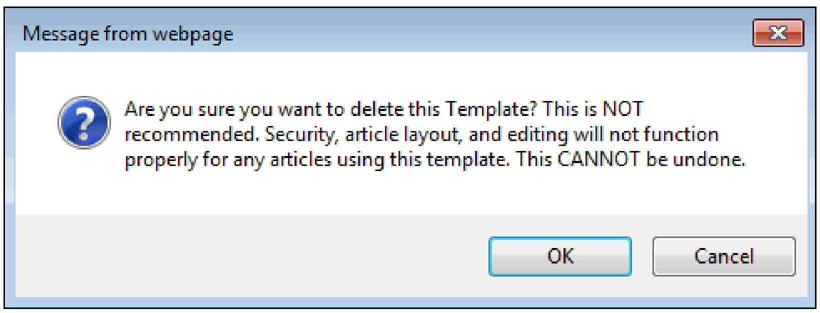


Figure 328 Delete Template Confirmation Dialog Box

3. Click **OK**. The Article Template is deleted.

   - OR -

   Click **Cancel**.

Article Template Transfer

The Article Template Transfer feature enables you to update all the existing Article Templates with the modified Article Template.

Click the **Article Template Transfer** on the Article Template page to update all the articles with the modified or new Article Template. When you click the **Article Template Transfer**, the Template Transfer schedule task initiates, and updates all the articles with the modified Article Template.

Article Check-in & Out

This chapter gives you detailed information about the Article Check-in & Out functionality in Moxie Knowledge Spaces Admin Control Panel.

Article Checked Out Notification & Auto Check In

When an Article is selected for editing, it is automatically checked out, so that other Users cannot modify the Article while being edited.

There is the possibility that an author can check out an Article, and forget to check it back in, making the Article un-editable for an indefinite period.

To avoid Articles checked out for a long time, you can create a Notification email message that is sent to the Users who have Articles checked out beyond a determined time period. You can also set the Articles to automatically check themselves back in after a specified period.

> **Note:**
>
> You must be granted the **Article Check In/Out permission** to access the **Article Check In/Out** functionality.

To Set an Article Checked Out Notification and Automatic Check In

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration >Article Templates**. the **Article Check In/Out** page is displayed.

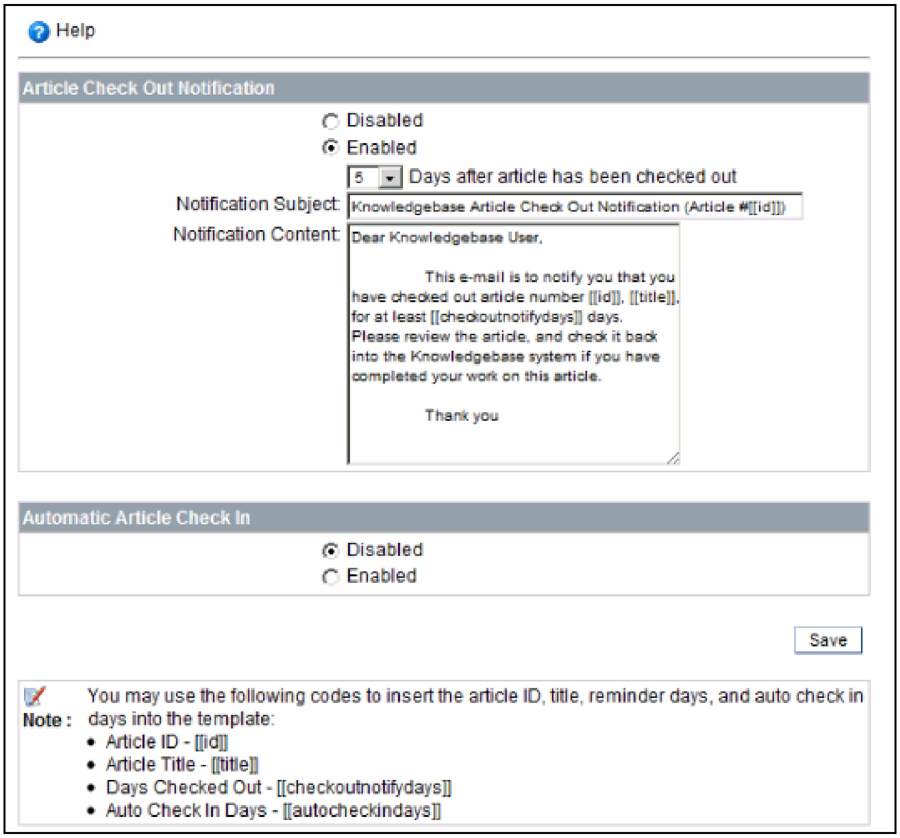


Figure 329 Article Check In/Out Page

2. Select the Enable to enable the Article check out notification feature.
3. From the **Days after article has been checked out** list, select the number of days to set the number of days. All notification E-mail messages are sent to the Users who have checked out the Article after the specific days selected from the list.
4. In the **Notification Content** field, type the content of the email message that is sent to Moxie Knowledge Spaces Users.

   Use the following tags in the E-mail template to include specific Article, and date information dynamically in the E-mail message sent out:

   - Article ID - [[id]]
   - Article Title - [[title]]
   - Days Checked Out - [[checkoutnotifydays]]
   - Auto Check In Days - [[autocheckindays]]
5. In the **Automatic Article Check In** area, select Enable to enable the Automatic Check In for an Article or select Disable to disable the automatic Article check in.
6. From the Days after article has been checked out list, select the number of days you want to wait before automatically checking in the Article.

   After the Article has been checked out for the set number of days, it automatically checks in the Article.
7. To send an E-mail notification to the User who checked out the Article when it auto-checks back in, select the Send email notification option.

8. In the **Notification Content** field, type the content of the email message that is sent to the User when the Article is automatically checked-in.

   Use the following tags in the email template to include specific Article, and date information dynamically in the email message sent out:

   - Article ID - [[id]]
   - Article Title - [[title]]
   - Days Checked Out - [[checkoutnotifydays]]
   - Auto Check In Days - [[autocheckindays]]

Administrator Check-In

The Moxie Knowledge Spaces Administrators or the Internal Users can be assigned with administrative Article check-in control. To Grant Administrator Article Check In Control

1. In the Moxie Knowledge Spaces Admin Control Panel, click **Administration > Internal Users.** The **Internal Users** page is displayed.
2. Select the **User** to whom you want to assign **Administrator check-in** control.
3. In the **Access** area, expand the details link next to Article management, and select the **Administrative CheckIn** option.
4. Click **Save**.

Internal Users

This chapter introduces you to Internal Users inKnowledge Spaces™ Admin Control Panel.

About Internal Users

The Internal Users section of the Administration tab enables you to create and configure Internal Users who can access Knowledge Spaces™ Admin Control Panel.

Internal Users can perform functions that range from Article creation, to Workflow approval, and report configuration. In the Internal Users section, you can manage the permissions and job functions for each User.

Often, the list of Internal Users that you create is a group of employees at your company who have administrative access into Knowledge Spaces™ Admin Control Panel. On the Internal Users page, you can see a list of the current Users who have access to Knowledge Spaces™ Admin Control Panel.

> **Note:**
>
> You must be granted the **Internal Users** permission to access the Internal Users functionality.

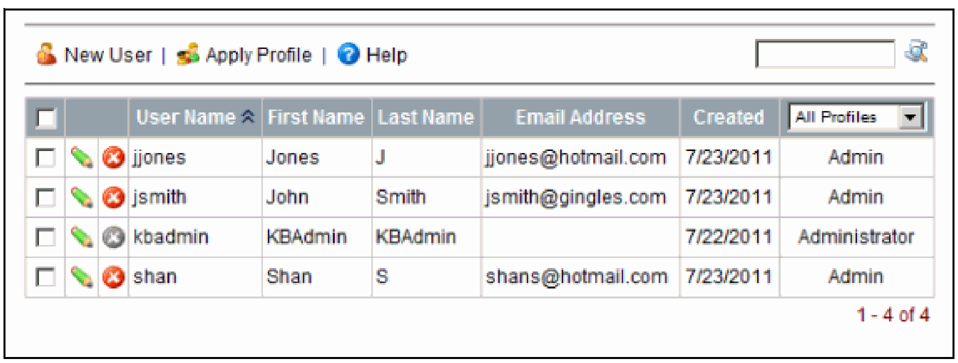


Figure 330 Internal Users Page

> **Tip:**
>
> There is no need to create Internal User accounts for employees who do not need to log on to Knowledge Spaces™ Admin Control Panel. Employees, or Departments who use only the Knowledge Spaces™ Customer Portal functions do not need to have Internal User Accounts.

The **KB Admin** Internal User is created at the time of installation. If KB Admin is the only Internal User listed on the Internal User page, then no other Internal Users are created.

From the Internal User's page, you can sort the Articles in the following five ways:

- User Name
- First Name
- Last Name
- Email Address
- Date Created
- Profiles

To sort the Users by User Name, First Name, Last Name, Email Address, or Date Created, click the relevant column heading. For example, to sort Users by First Name, click on the First Name link. The Users are sorted in the alphabetical order of the First Name. The default sort for Users is alphabetical by First name.

To sort the Users by the Profiles, from the All Profiles list, select a Profile. The Users associated with the selected Profile are displayed on the Internal Users page.

Creating a New Internal User

You can create Internal Users and associate them with a Internal Access Profile to grant them access to the features in Knowledge Spaces™ Admin Control Panel.

> **Note:**
>
> You must be granted the **Create New User** permission to create new Users.

To Create an Internal User

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration > Internal Users**. The **Internal Users** page is displayed.

Figure 331 Internal Users Page

2. Click 

. The **New User** page is displayed.

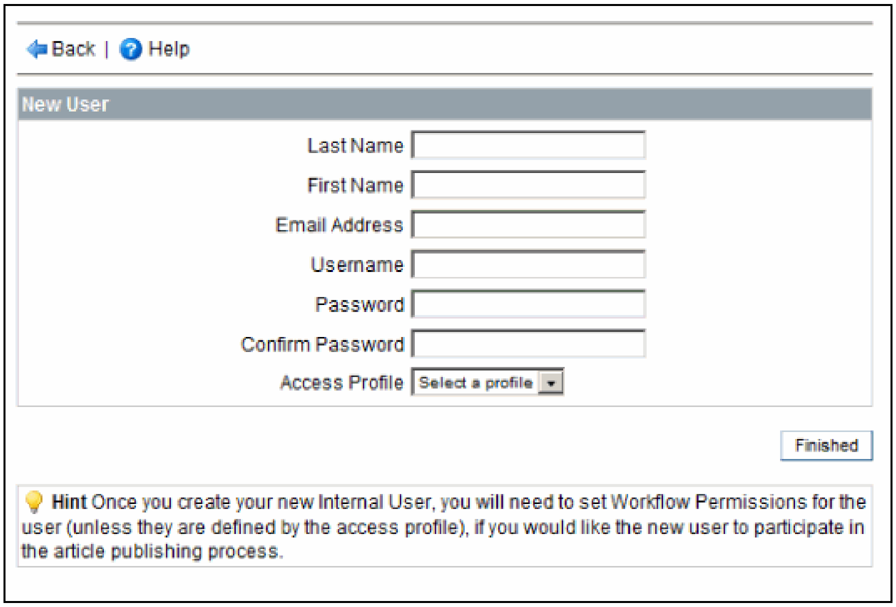


Figure 332 New User Page

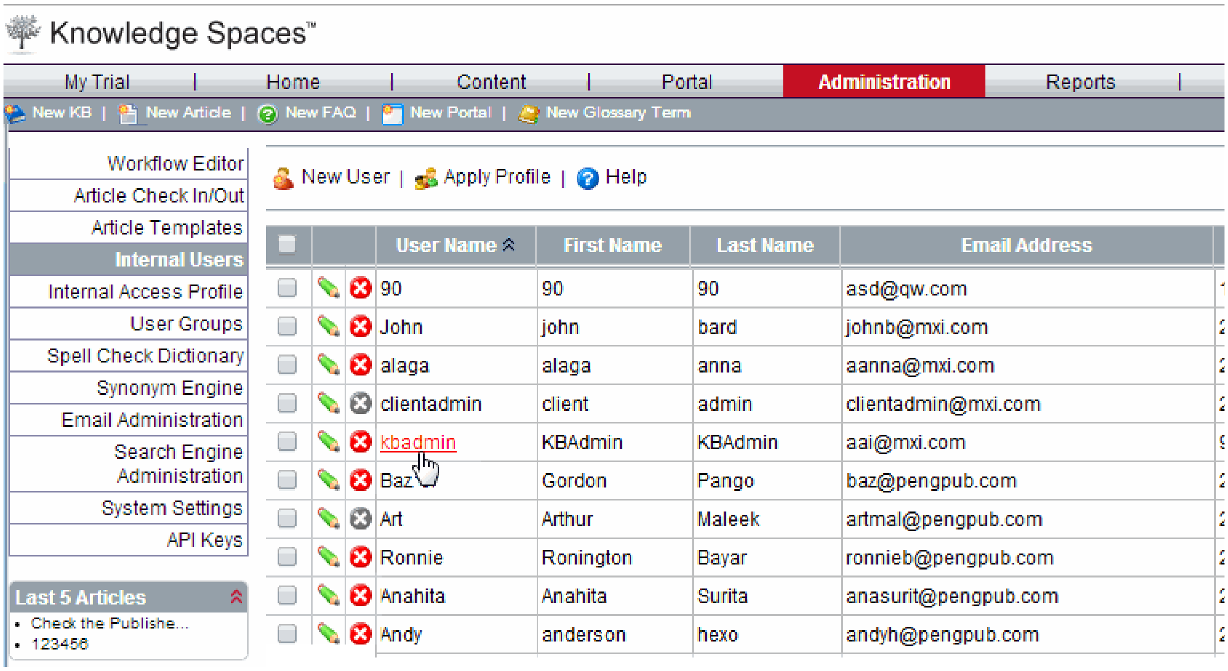
3. Type the details in the **First Name**, **Last Name**, and **Email Address** fields.
4. Enter a **Username**, and **Password**. Retype the password in the **Confirm Password** field.
5. Select an **Access Profile**. The profile defines the permissions that this User has when logging on to Knowledge Spaces™ Admin Control Panel.
6. Click **Finished**. The Internal User is created.

Editing Internal User Properties

You can edit the properties of an Internal User from the Internal Users page.

To edit the properties of an Internal User, carry out the following steps:

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration** > **Internal Users**. The **Internal Users** page is displayed.

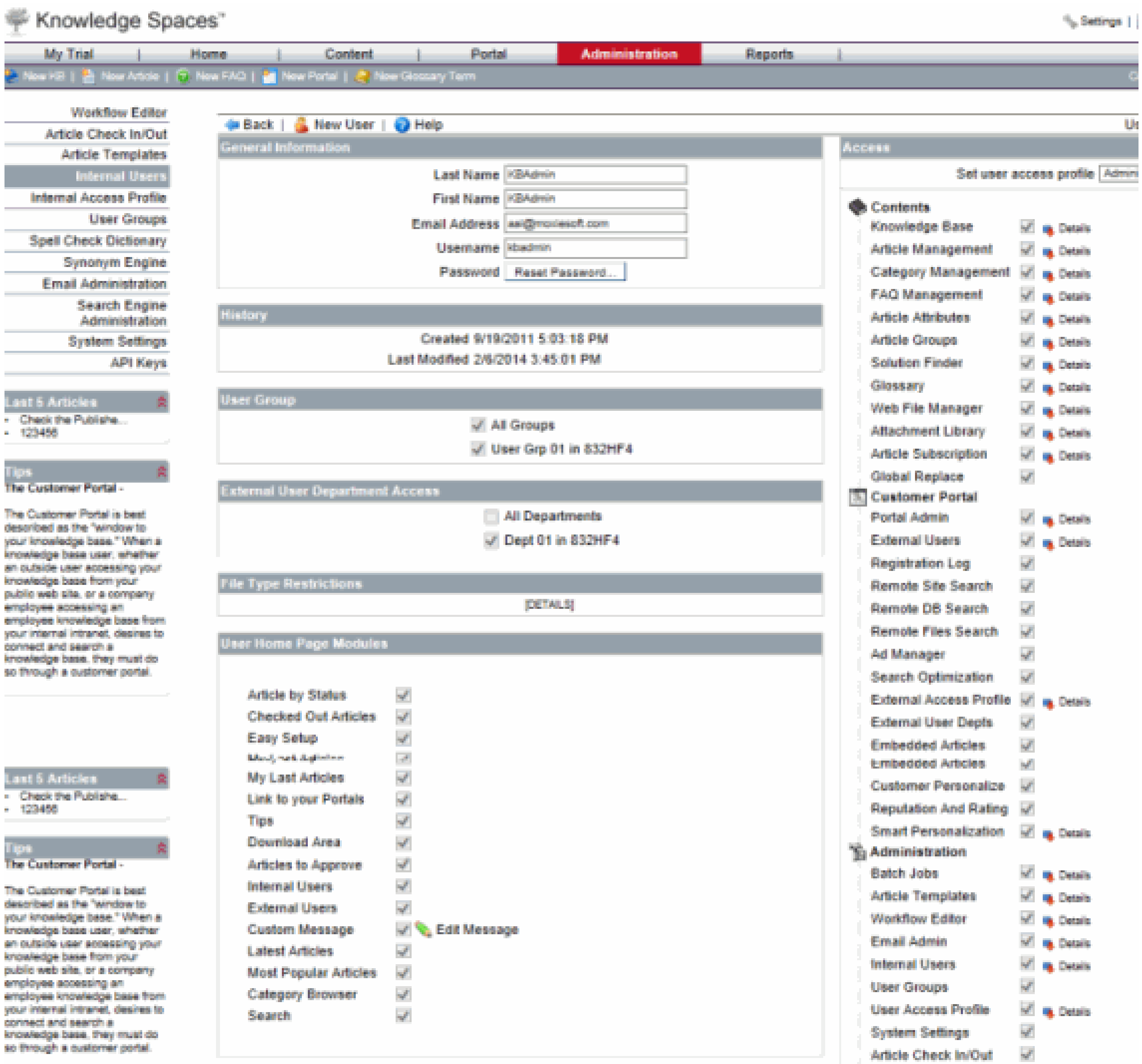


2. Click any Internal User. The following page is displayed.

Figure 333 Edit Internal User Properties

From the Internal Users page, click the name of an Internal User or click the icon to the left of the User name to view the User Properties page for the User. You can modify information about the Internal User, associate a different User Access Profile, and click **Save.** The settings will take effect the next time the Internal User logs on toKnowledge Spaces™ Admin Control Panel.

> **Note:**
>
> You must be granted the **Edit User Information** permission to Edit the General Information of Internal Users.
>
> - You cannot edit the permissions associated to an Internal User.
> - The components that the Internal User can access when logged on to Knowledge Spaces™ Admin Control Panel are checked on the User Properties page.



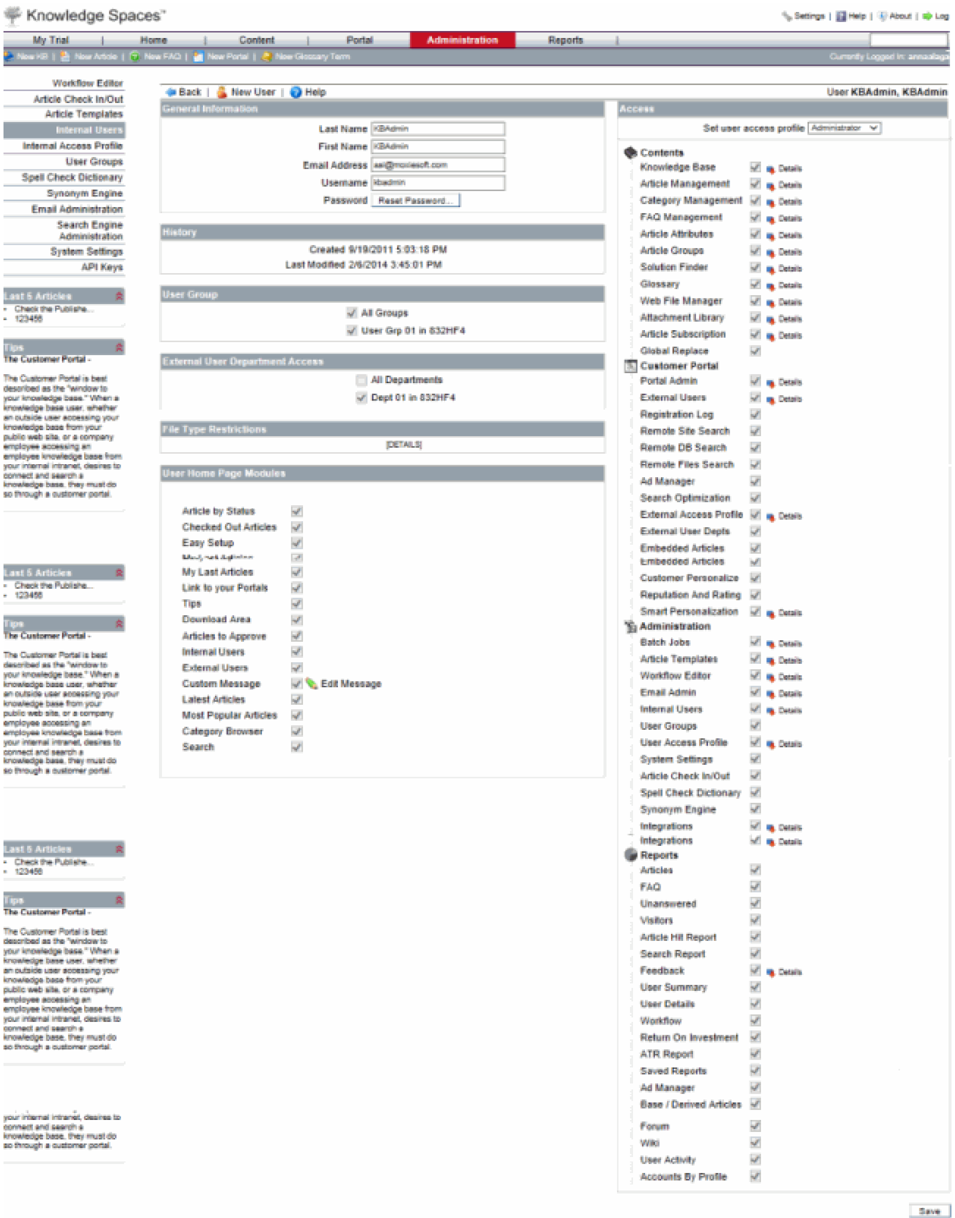
The following fields are displayed in the Edit Internal User Properties page

Fields	Description
General Information	
Last Name	The last name of the user. You can edit the last name of the user.
First Name	The first name of the user. You can edit the first name of the user.
Email Address	The Email Address of the user.

Fields	Description
User Name	The user name used to log onto Moxie Knowledge Spaces Admin Control Panel. You can edit the User Name.
Password	Allows you to reset the password for the user.
History	
Created	The date on which the Internal user account was created
Last Modified	The date on which the Internal User account was last modified.
User Group	
This section displays the set of user groups available in the Moxie Knowledge Spaces to which the user has access.	
External User Department Access	
This section displays the set of External User Departments available in the Knowledge Spaces™ Admin Control Panel to which the user has access.	
File Type Restrictions	
DETAILS	Allows you to set restrictions on the types of files that the Internal User can import into Moxie Knowledge Spaces Admin Control Panel.
User Home Page Modules	These are the modules for which the user has access permission. These modules are displayed on the Moxie Knowledge Spaces Admin Control Panel Home page. The Internal User when logs on to the Knowledge Spaces™ Admin Control Panel, can quickly perform certain tasks using these modules. These modules are also displayed on the **Internal User Property** page, enables the user to view and edit some of the features.
Article by Status	The user can view the Articles sorted by status.
Checked Out Articles	The user can view the Articles which are checked out by other users.
Easy Setup	The user can create a Knowledge Base, an Article and a Customer Portal using the easy steps.
My Last Articles	The user can view the Articles viewed/created last time.
Link to your Portals	The user can view the links to the Portal.
Tips	The user can view the tips.
Download Area	The user can download the Moxie Knowledge Spaces Admin Control Panel User Manual.
Articles to Approve	The user can view the Articles that are pending for approval.
Internal Users	The user can view the list of all the Internal Users who can access Moxie Knowledge Spaces Admin Control .

Fields	Description
External Users	The user can view the list of all the External Users who can access Moxie Knowledge Spaces Customer Portal.
Custom Message	The user can view the message. The message can be customized by clicking 
Latest Articles	The user can view the latest Articles viewed by the external users on Moxie Knowledge Spaces Customer Portal
Most Popular Articles	The user can view the most popular Articles
Category Browser	The user can view the list of Knowledge Spaces associated with Category Browsing feature.
Search	The user can search for an Article using the Search feature.
Access	
user access profile	Enables you to associate a new User Profile to the user.

Make changes to the entries in these fields to update the selected internal user’s details.



Click save to make these changes permanent.

Deleting an Internal User

You can delete Internal Users created in Knowledge Spaces™ Admin Control Panel.

> **Note:**
>
> You must be granted the **Delete User** permission to delete Internal Users.

To Delete Internal Users

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration > Internal Users**. The **Internal Users** page is displayed.

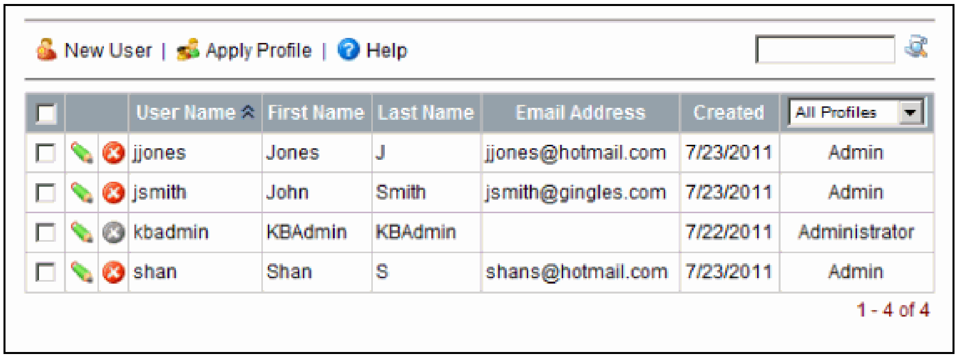


Figure 334 Internal Users Page

2. Click to the left of the First name of the Internal User to be deleted. A confirmation message is displayed.

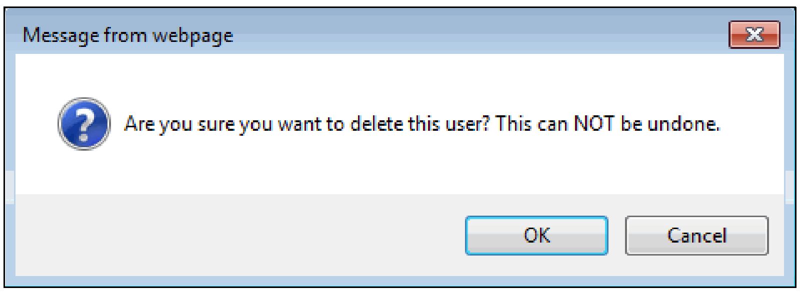


Figure 335 Deleting an Internal User Message Box

3. Click **OK.**

> **Note:**
>
> If the Internal User is a User from Active Directory, the Internal User must be removed from the Active Directory first, and then removed from the Knowledge Spaces™ Admin Control Panel.

Password Management

The password management enhancements facilitate improved password security to be in synch with industry best practices. This update applies the following rules to ensure that internal and external user passwords comply with industry standard security recommendations.

Rules for time-bound password renewal force:

- expiring passwords after they have reached a maximum age limit.
- locking accounts after passwords have been input incorrectly multiple times.

Rules to bar users from setting easily guessed passwords:

- A password must be in mixed case.
- At least one number and special character must be included in the password.
- Black listed items such as "password" or keyboard sequences such as "qwerty" cannot be used in a password.
- A message is displayed on the screen to change password after 80 days
- Passwords used in the last 90 days cannot be reused
- Last 3 passwords cannot be reused.

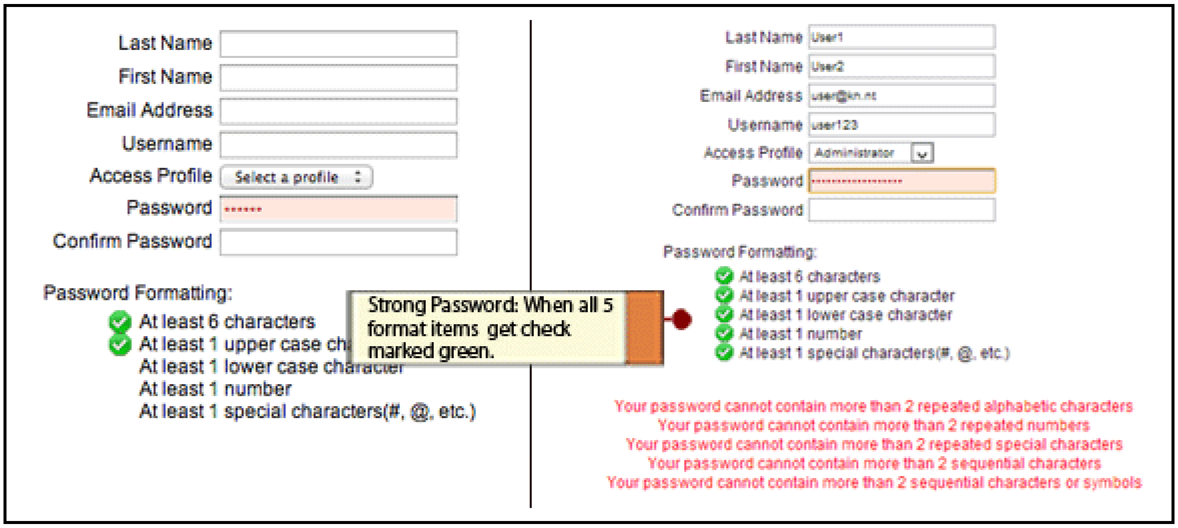


Figure 336 Password Management - Tool-tip and checks for Password Formatting

As illustrated in Figure 336, the in-line password checks indicate to users even as they enter the password, whether or not the entry complies with the new password policy. All the requirements must be met for a password to be accepted as 'strong'.

> **Note**
>
> The following accounts or users will not be affected by this update:
>
> - The default administrator account
> - Users created by integration of any of the following
>   - *active directory*
>   - *spaces connect*
>   - Smart Personalization

Bulk User Profile Application

Knowledge Spaces™ enables you to apply Internal User Access Profiles to a large number of Internal Users with a single action. This can be useful when large scale changes are required.

To Apply Profiles to a Number of Internal Users

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration > Internal Users**. The **Internal Users** page is displayed.
2. Select the Internal Users to whom you want to apply the profile.
3. Click **Apply Profile**. A confirmation message is displayed.

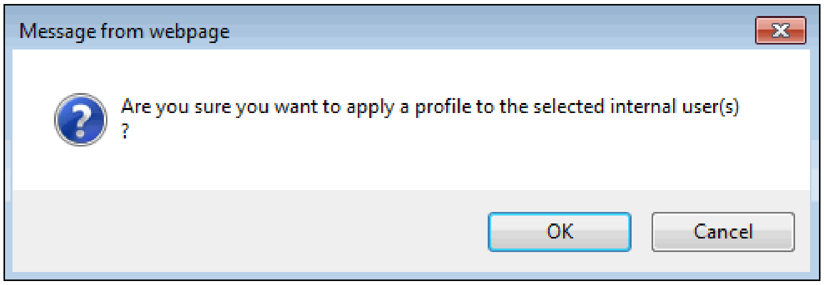


Figure 337 Apply Profile to Selected Users Dialog Box.

4. Click **OK**. The following page is displayed.

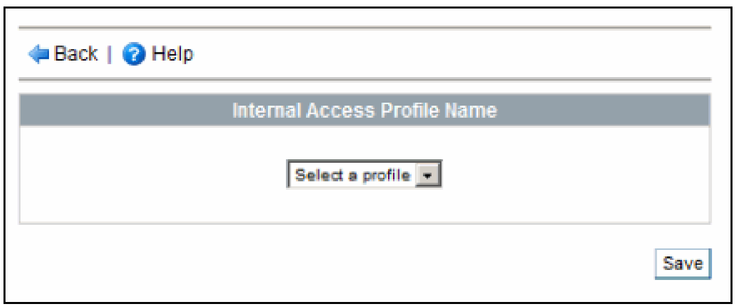


Figure 338 Internal Access Profile Name Page

5. Select a profile you want to apply.
6. Click **Save**.

Internal Access Profiles

This section introduces you to Internal Access Profiles in Moxie Knowledge Spaces Admin Control Panel.

About Internal Access Profiles

Internal Access Profile feature enables you to set permissions for the Internal Users to access Knowledge Spaces™ Admin Control Panel modules and features. The Internal Access Profile page includes all the modules of Knowledge Spaces™ Admin Control Panel, the Administrator can select the modules and create a profile. While creating an Internal User, a profile must be associated with the User. The Internal User can access the Knowledge Spaces™ Admin Control Panel modules based on the Internal Access Profile.

If you have different types of Internal Users, either by function (author, editor, Administrator, etc.) or Department, the Internal Access profiles are very effective for standardizing Internal User permissions and making the creation of many Internal Users a quick, and consistent process.

Note:

You must be granted the **User Access Profile** permission to access the Internal Access Profiles feature.

Creating a New Internal Access Profile

To Create an Internal Access Profile

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration > Internal Access Profile**. The **Internal Access Profile** page is displayed.

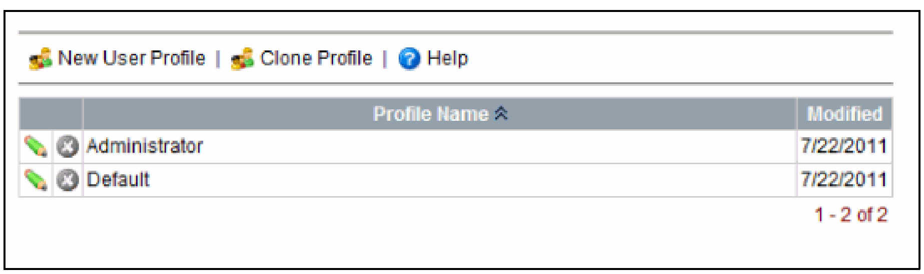


Figure 339 Internal Access Profile Page

2. Click 

. The **New User Profile** page is displayed.

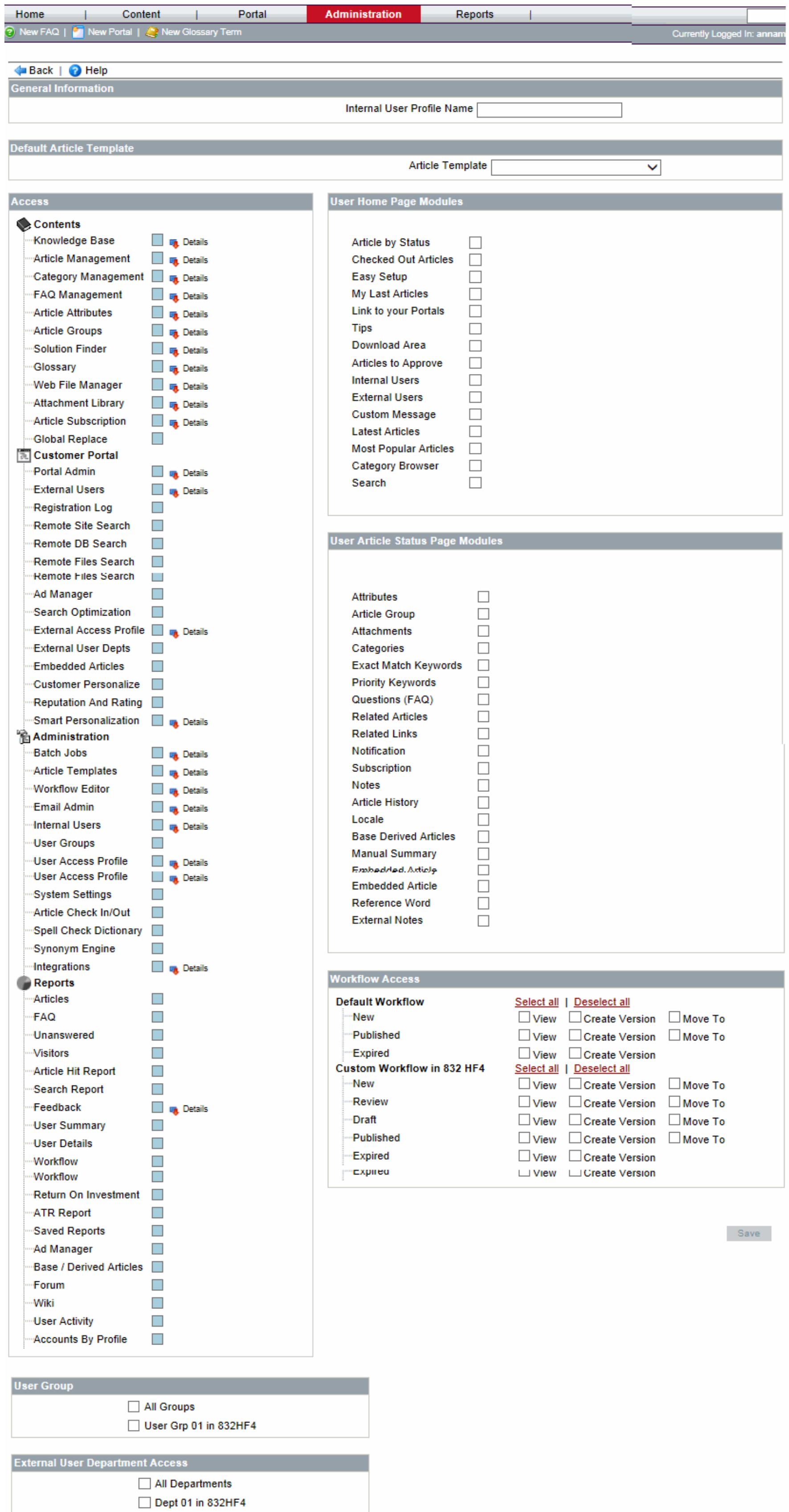

Home
Content
Portal
Administration
Reports
New FAQ
New Portal
New Glossary Term
Currently Logged In: annam
Back
Help
General Information
Internal User Profile Name
Default Article Template
Article Template
Access
Contents
Knowledge Base
Article Management
Category Management
FAQ Management
Article Attributes
Article Groups
Solution Finder
Glossary
Web File Manager
Attachment Library
Article Subscription
Global Replace
Customer Portal
Portal Admin
External Users
Registration Log
Remote Site Search
Remote DB Search
Remote Files Search
Remote Files Search
Ad Manager
Search Optimization
External Access Profile
External User Depts
Embedded Articles
Customer Personalize
Reputation And Rating
Smart Personalization
Administration
Batch Jobs
Article Templates
Workflow Editor
Email Admin
Internal Users
User Groups
User Access Profile
User Access Profile
System Settings
Article Check In/Out
Spell Check Dictionary
Synonym Engine
Integrations
Reports
Articles
FAQ
Unanswered
Visitors
Article Hit Report
Search Report
Feedback
User Summary
User Details
Workflow
Workflow
Return On Investment
ATR Report
Saved Reports
Ad Manager
Base / Derived Articles
Forum
Wiki
User Activity
Accounts By Profile
Details
User Home Page Modules
Article by Status
Checked Out Articles
Easy Setup
My Last Articles
Link to your Portals
Tips
Download Area
Articles to Approve
Internal Users
External Users
Custom Message
Latest Articles
Most Popular Articles
Category Browser
Search
User Article Status Page Modules
Attributes
Article Group
Attachments
Categories
Exact Match Keywords
Priority Keywords
Questions (FAQ)
Related Articles
Related Links
Notification
Subscription
Notes
Article History
Locale
Base Derived Articles
Manual Summary
Embedded Article
Embedded Article
Reference Word
External Notes
Workflow Access
Default Workflow
Select all | Deselect all
New View Create Version Move To
Published View Create Version Move To
Expired View Create Version
Custom Workflow in 832 HF4
Select all | Deselect all
New View Create Version Move To
Review View Create Version Move To
Draft View Create Version Move To
Published View Create Version Move To
Expired View Create Version
Expired View Create Version
Save
User Group
All Groups
User Grp 01 in 832HF4
External User Department Access
All Departments
Dept 01 in 832HF4

Figure 340 New User Profile Page

3. In the **Internal User Profile Name** field, type a name for the new profile.
4. In the **Article Template** list, select an **Article Template** you want to associate to the profile.

> **Note:**
>
> You must be granted the **Create New Access Profile** permission to create a New Internal Access Profile.
>
> When an Internal User whose Internal Access Profile is associated with an Article Template tries to create a new Article, the Article Template field in the New Article page automatically displays the default Article Template associated to the User's Profile. The Internal User can continue to use the default Article template for the Article or click the Article Template list box to select a different Article Template for the Article.

5. In the **Access** area, select the features/modules you want **to** associate to the profile.
6. Click **Save**. The new profile is saved.

Note:

While selecting the permissions on the Internal Access Profile page, you can select or clear all the sub-options associated with a parent option by selecting or clearing the check box adjacent to the parent option, respectively. In addition, the color of a parent option on the page indicates whether all the sub-options associated with the parent option are selected. A parent option with a white check box indicates that all its sub-options are selected, and a parent option with a pale blue check box indicates that some of its sub-options are not selected.

The following figure shows the Internal Access Profile page with the color codes of the check boxes to indicate the partial selection of the sub options, and full selection of the sub options within the parent option:

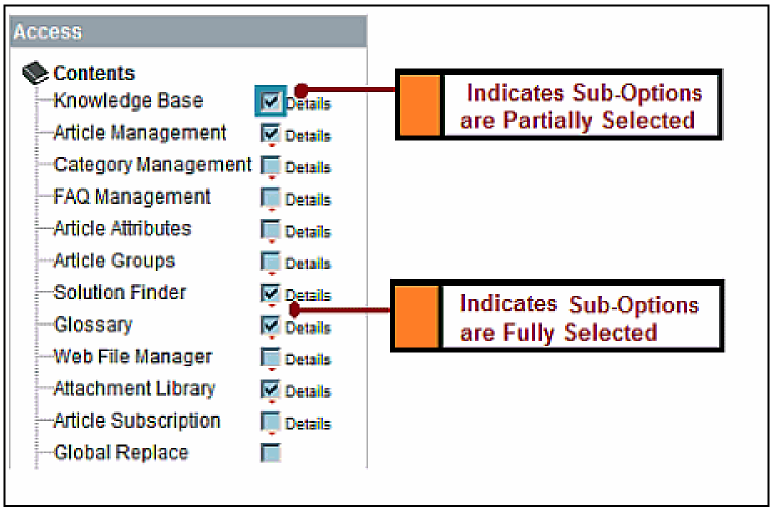


Figure 341 Internal Access Profile Page Showing the Color Codes of the Check boxes

Setting the Properties of an Article

The Article Information page for an Article provides an Internal User with general information about a selected Article. The Article Information page includes the general Article information area, and two tabs, the Properties tab, and the Versions tab. From the Internal Access Profile page, you can set the Properties that a particular User can view in the Properties tab of the Article Information page. A User can only see the Properties that are configured in the Internal Access Profile page.

The Properties tab comprises the following sections:

- Attributes
- Article Groups
- Attachments
- Categories
- Exact Match Keywords

- Priority Keywords
- Questions (FAQ)
- Related Articles
- Related Links
- Notification
- Subscription
- Notes
- Article History
- Locale
- Manual Summary
- Reference Word
- Base And Derived Articles
- Parent And Embedded Articles
- External Notes

To configure the Properties listed in the Properties tab of an Article for an Internal User, carry out the following steps:

1. From the **Administration** tab, click **Internal Access Profile.** The **Internal Access Profile** Home page is displayed.
2. Click adjacent to the Profile Name, or click the **Profile Name**. The **Profile Access** Page is displayed.
3. From the **User Article Status Page Modules** area, select the **Article Properties** to be displayed in the Articles tab. The **User Article Status Page Modules** area is shown in the following figure:

Figure 342 User Article Status Page Modules Area

4. Click **Save** to save the settings.

   In the **Properties** tab of the **Article Information** page, the User associated with this **Internal Access Profile** can view the Properties you configured on this page.

Editing Internal Access Profiles

The existing Internal Access Profiles are listed on the Internal Access Profiles home page. You can edit an existing Access Profile.

> **Note:**
>
> You must be granted the Edit Access Profile permission to edit Internal Access Profiles.

To Edit an Internal Access Profile

1. From the **Administration** tab, click **Internal Access Profile**. The **Internal Access Profile** home page is displayed.
2. Click to the left of the **Internal Access Profile** name, or click the profile name. The Profile **Access Page** is displayed.
3. Edit the profile name, change the **Article Template** association to the profile, or change the profile permissions.

4. Click **Save**.

Cloning an Internal Access Profile

Cloning an Internal Profile enables you to create a copy of a previously available Internal Profile. When you do so, Internal User permissions assigned to the original Profile are copied to a new Profile.

When you modify the new Profile, details of the original Profile remain unchanged.

This feature is especially useful when you need to modify the attributes of a User Profile that is currently associated with another Internal Profile. All you have to do is create a clone of the Internal Profile, modify the attributes appropriately, and associate the User with the new Internal Profile.

To Clone an Internal Access Profile

1. From the **Administration** tab, click **Internal Access Profile**. The **Internal Access Profile** home page is displayed.
2. Click 

. The **Clone Internal Access Profile** page is displayed.
3. In the **Internal User Profile Name** field, type a name for the new Profile.
4. From the **Clone Profile** list, select the Profile whose details you want to clone.
5. Click **Save**. The Internal Profile is cloned.

Deleting Internal Access Profiles

You can delete Internal Access Profiles.

> **Note:**
>
> You must be granted the Delete Access Profile permission to delete Internal Access Profiles.

To Delete an Internal Access Profile

1. On the left of the Internal Access Profile name, click . You are prompted with the following message.

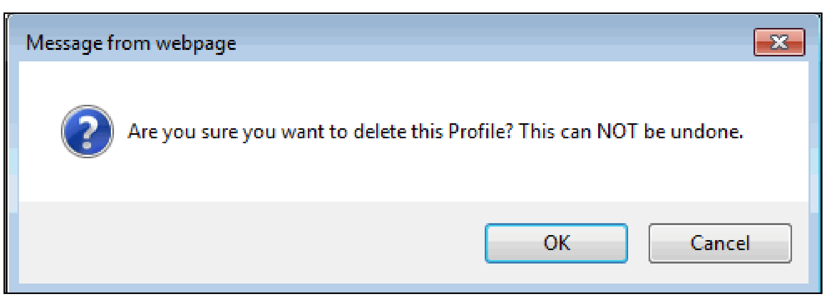


Figure 343 Deleting an Internal Access Profile

2. Click **OK**. The **Internal Access Profile** is deleted..

> **Note:**
>
> Deleting an Internal Access Profile will not delete Internal Users who have been assigned this profile. The Internal Users will retain the permissions they have been assigned with the last profile application or manual permissions setting.
>
> You cannot delete the Administrator and the Default Access Profiles

- Or -

If there are Users associated to the Profile, the following mesage is displayed.

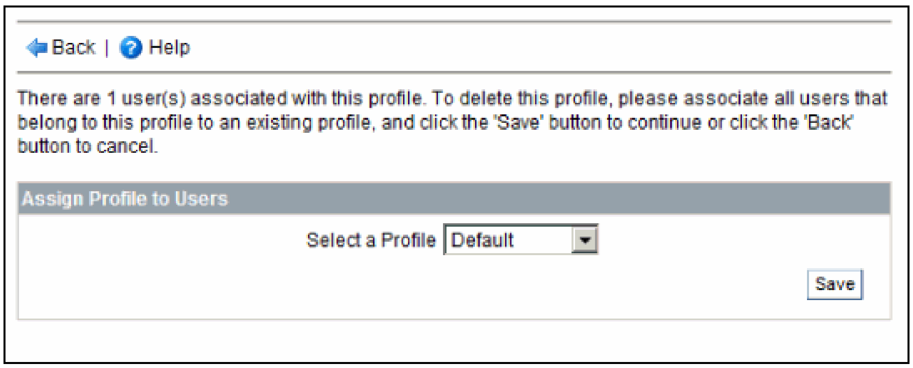


Figure 344 Assign Profile to Users Page

3. Select an existing Profile to which you want to associate the Users.
4. Click **Save**.

Management of Active Directory Profiles

Knowledge Spaces™ includes two features for simpler management of Active Directory groups.

- A single page interface to map profiles.

  This interface allows administrators to map multiple user profiles in ***Active Directory*** groups to Knowledge Spaces™ profiles. In prior versions user profiles had to be mapped individually. This update reduces the time and effort required for this action.
- A rollup profile comprising cumulative permissions for users who are in multiple *Active Directory Groups*. The implicit profile is not displayed nor is accessible.
- The mapping process automatically consolidates profile permissions across multiple mapped Knowledge Spaces™ *Internal* or *External* Profiles, into one rollup profile and grants cumulative permissions.

Administration Permission

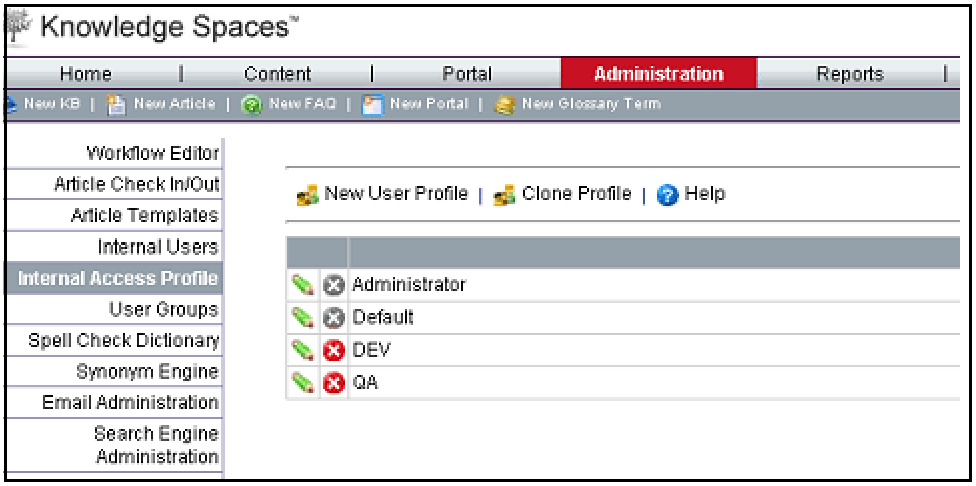


Figure 345 Select Administration > Internal Access Profile > User or Group

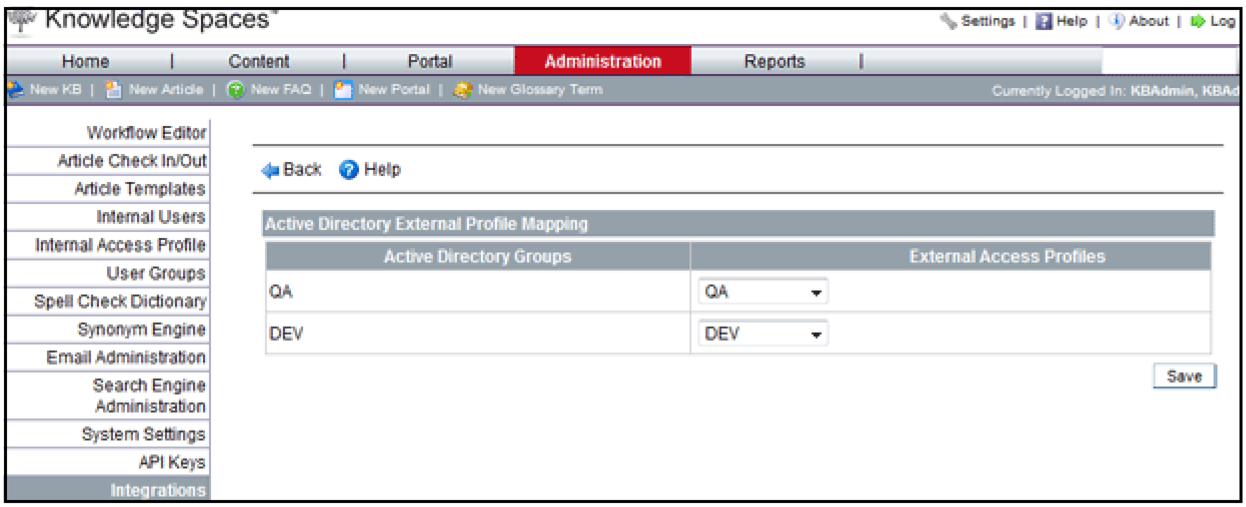


Figure 346 Options for Active Directory Profile Mapping

Sample Mapping of Profiles

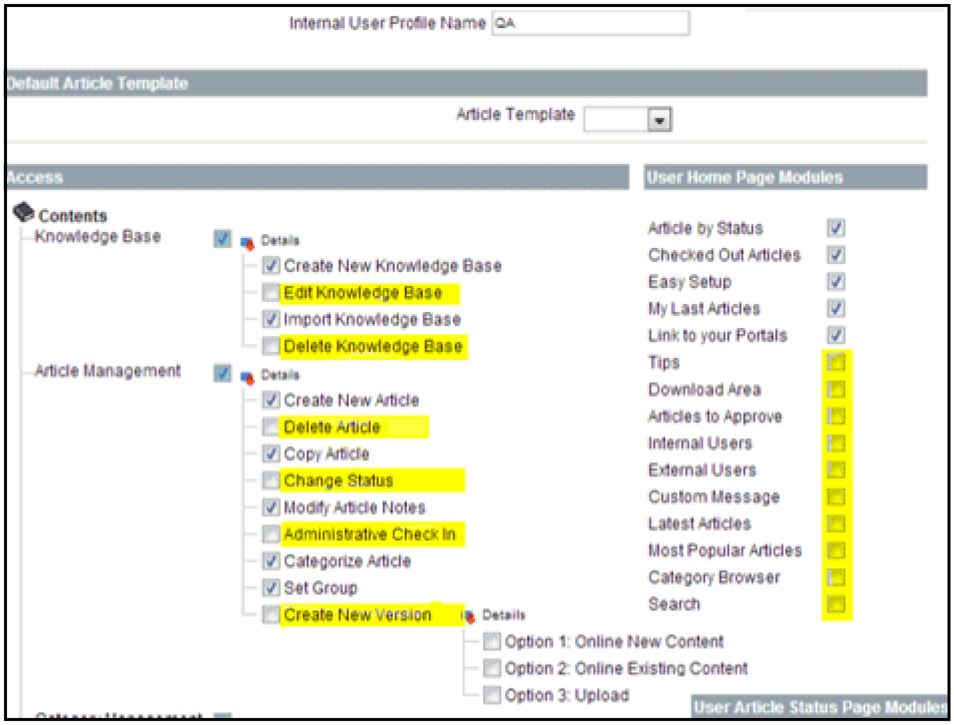


Figure 347 Note the Permissions for the Internal User Profile - QA

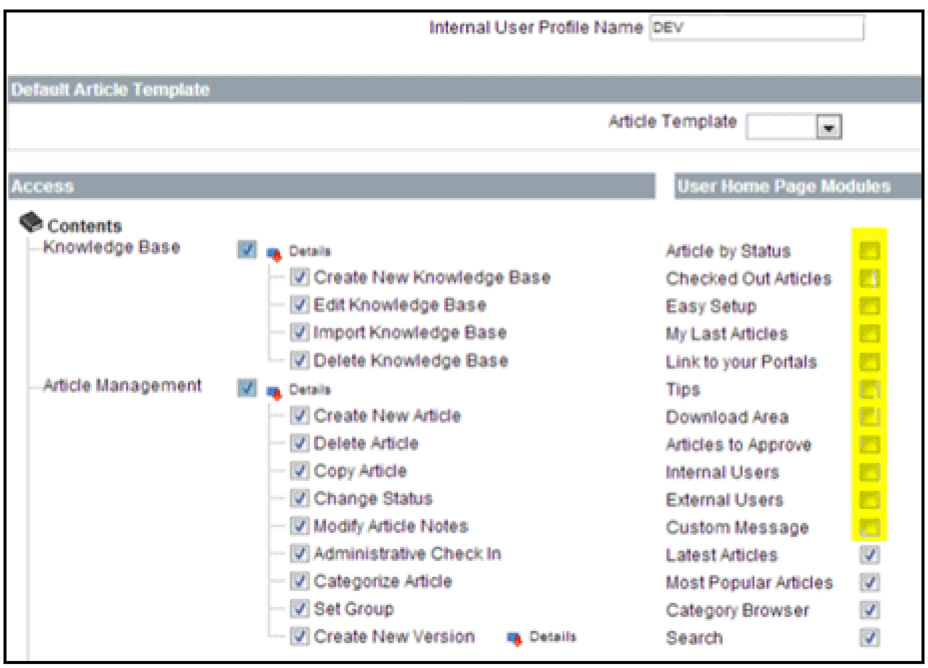


Figure 348 Note the Permissions for the Internal User Profile - Dev

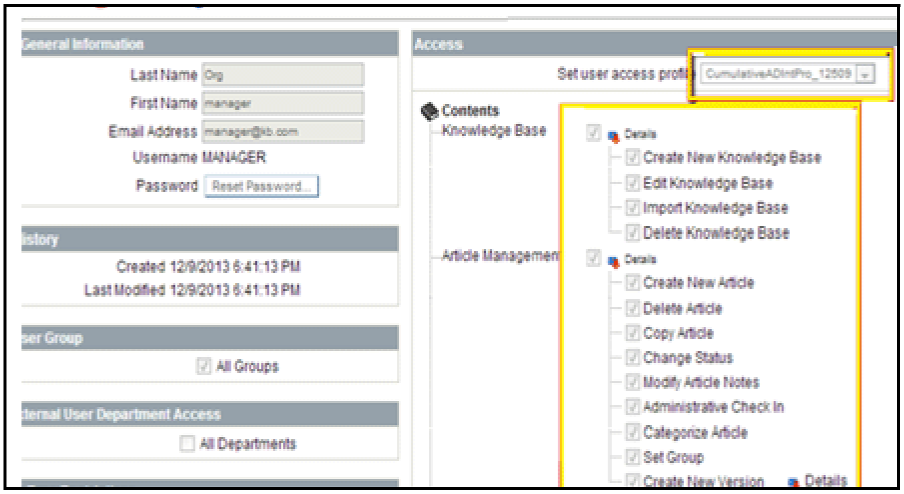


Figure 349 Note the Cumulative Permissions for the Internal User Profile - QA Manager

User Groups

This chapter introduces you to User Groups in Moxie Knowledge Spaces Admin Control Panel.

About User Groups

In the User Groups area of Moxie Knowledge Spaces Admin Control Panel, you can set up Internal User access based on User Groups. The default group is **All Groups**.

You can create User Groups that only have access to certain Knowledge Bases in Moxie Knowledge Spaces Admin Control Panel. When a User Group member logs on to Moxie Knowledge Spaces Admin Control Panel, the group member can only view, edit, and approve Articles in the Knowledge Bases that are accessible to that User Group. Knowledge Bases that are not included in their User Group cannot be viewed or accessed

Note:

- You cannot delete the default User Group.
- When you create a Knowledge Base, it is automatically added to All Groups.
- You must be granted the User Groups permission to create and manage User Groups.

Setting Up a New User Group

You can create new User Groups to enable Internal Users to access a selected group of Knowledge Bases in the Knowledge Spaces™ Admin Control Panel.

To Create a New User Group

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration > User Group,** the Internal Users page is displayed.

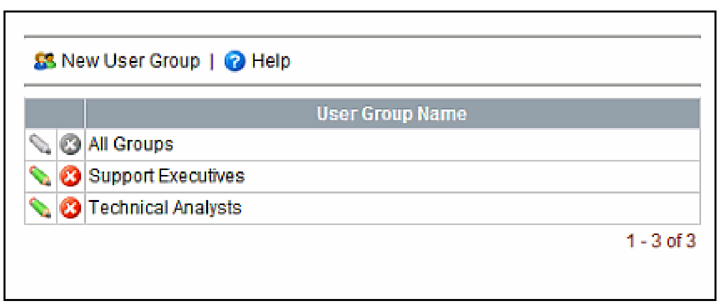


Figure 350 User Groups Page

2. Click 

. The **New User Group** page is displayed.

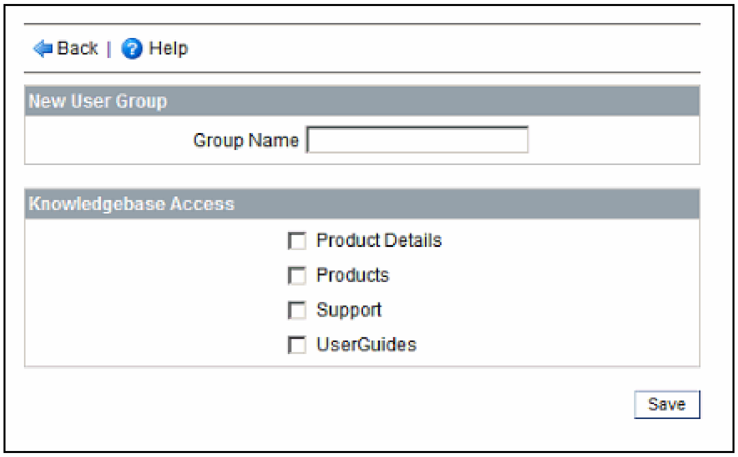


Figure 351 New User Group Page

3. In the **Group Name** field, type the group name.
4. Select the check boxes next to the Knowledge Bases you want to be accessible through this User Group.

   When an Internal User belonging to this User Group logs on to KB Admin Control Panel, the Internal User can only view, edit, and move documents in the Knowledge Bases that you have selected for this User Group.
5. Click **Save**.

Editing a User Group

On the User Groups page, you see a list of the existing User Groups. From this area, you can edit User Group names and the privileges that enable Internal Users to access a selected group of Knowledge Bases in Knowledge Spaces™ Admin Control Panel

To Edit a User Group

1. On the **User Groups** home page, click to the left of the **User Group** name. The **Edit User Group** page is displayed.

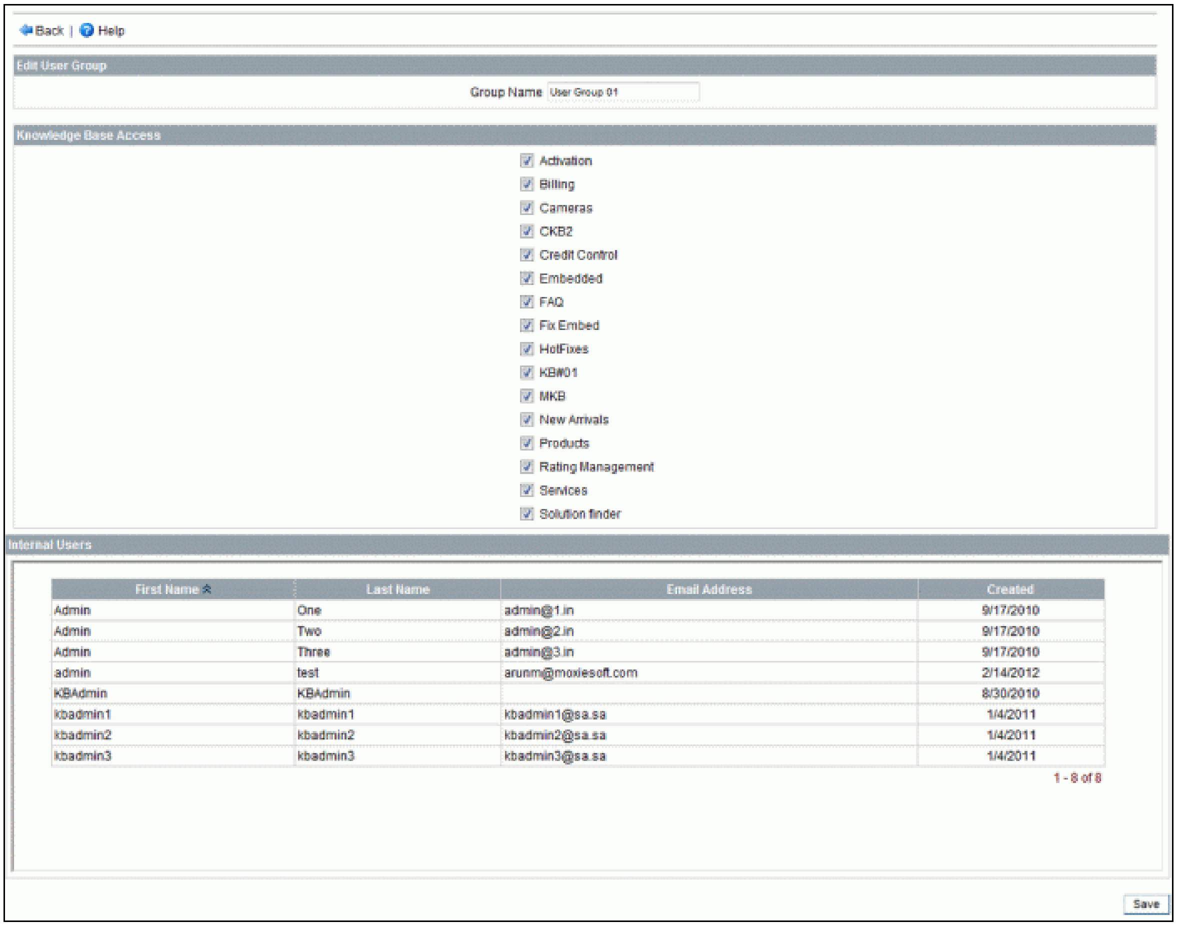


Figure 352 Edit User Group Page

2. In the **Group Name** field, modify the Group name.
3. To change Knowledge Base access privileges, select the check boxes next to the Knowledge Base(s) that you want Internal Users to access.
4. The Internal Users area lists the Internal Users who belong to the User Group.
5. Click **Save.**

   When an Internal User in this Group logs on to KB Administrator, the Internal User can only view, edit, and move documents in the Knowledge Bases that you selected for this Group.

> **Note:**
>
> To delete a User Group, click ✖ to the left of the User Group name, and click **OK** in the message displayed.

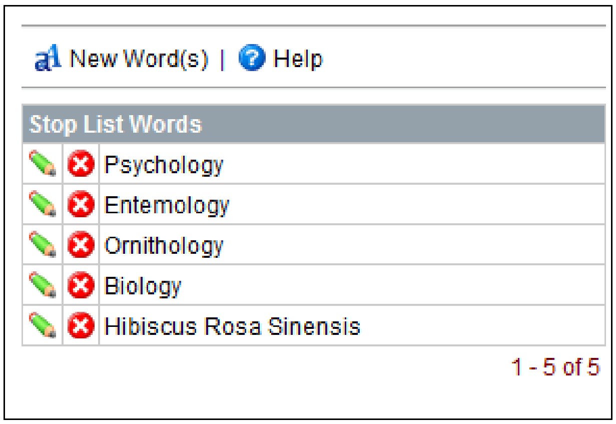
Spell Check Dictionary

Spell Check Dictonary feature available in the Moxie Knowledge Spaces enables a user to create an alphabetical list of words for a Knowledge Base.When a user types the words wrongly which is available in the Knowledge Base, the Spell Check Dictionary check the correctness of the word. If the word is typed wrongly, the Spell Check Dictionary corrects the word automatically.

Creating a New Word for Spell Check Dictionary

To create a new word for the Spell Check Dictionary, carry out the following steps:

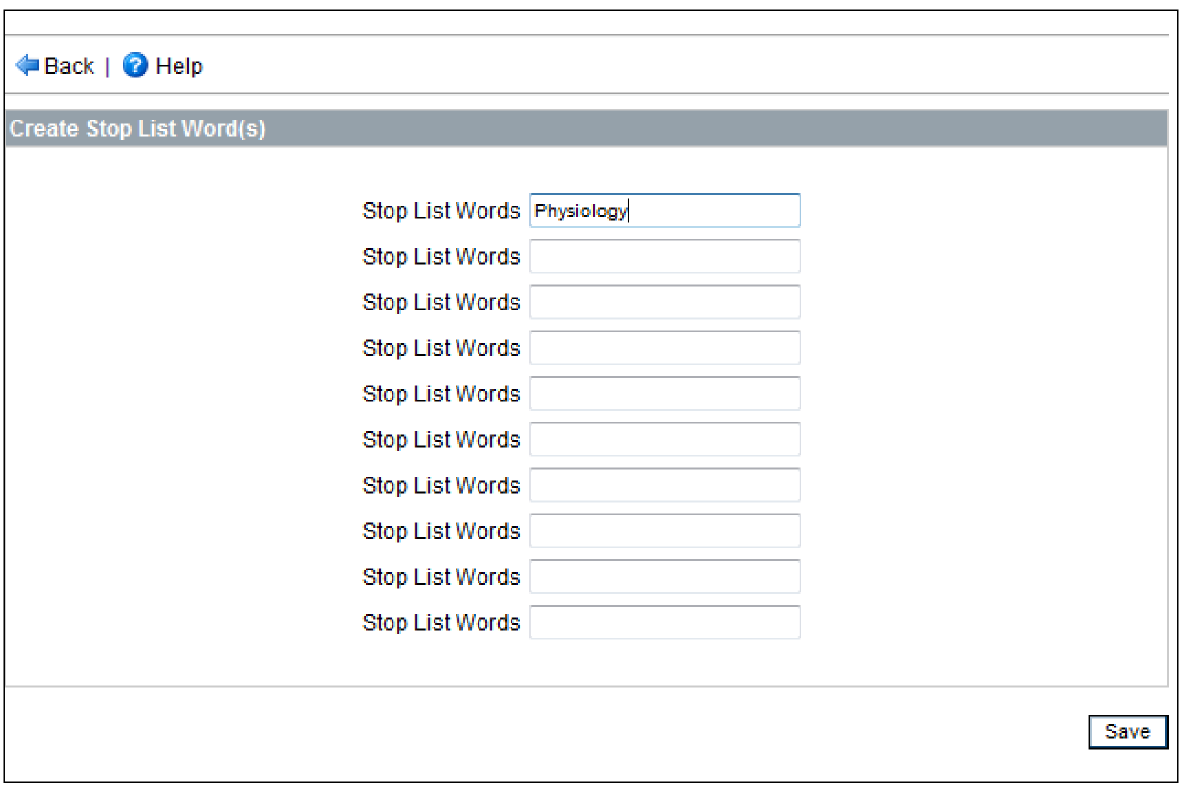
1. From the Administration menu, click Spell Check Dictionary, the Stop List Words page is displayed



.

Figure 353 Stop List Words

2. Click New Word(s). The Create Stop List Word(s) page is displayed.



3. Enter the new word in the Stop List Words field
4. Click **Save**. The new stop word is created

Editing a Stop Word

To edit a Stop Word, carry out the following steps:

1. From the Administration menu, click Spell Check Dictionary, the Stop List Words page is displayed.
2. Click next to the word which you want to edit. The Edit Stop List Word page is displayed.

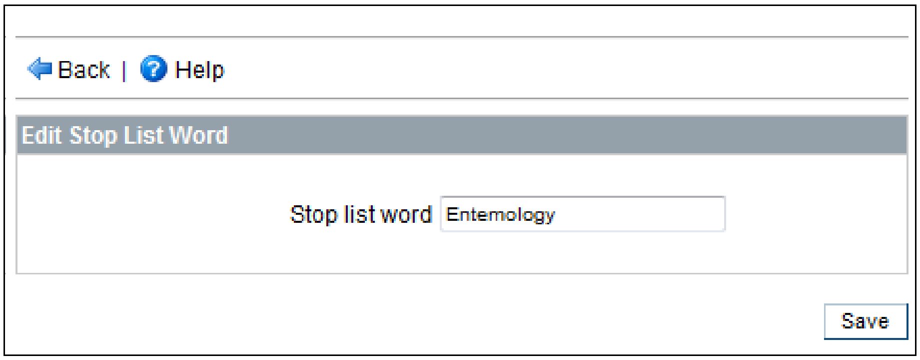
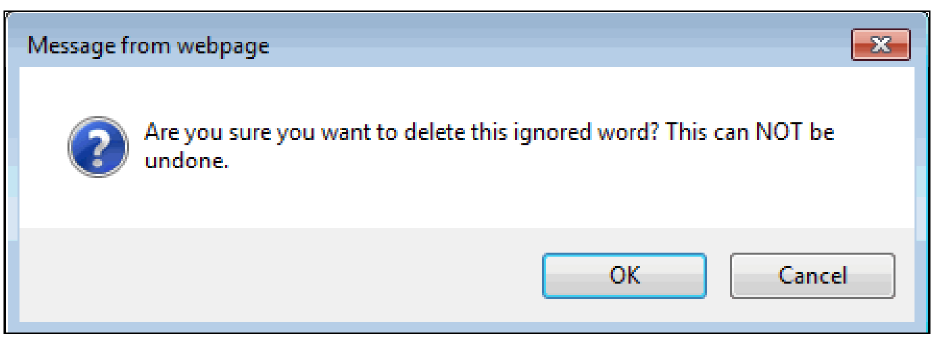


Figure 354 Edit Stop List Word Page

3. Modify the Stop list word.
4. Click **Save.**

Deleting a Stop List Word

1. From the Administration menu, click Spell Check Dictionary, the Stop List Words page is displayed.
2. Click next to the Stop List Word which you want to delete.A confirmation message is displayed



3. Click **OK** to delete the Stop Word.

Synonym Engine

The Synonym Engine feature available in the Moxie Knowledge Spaces Admin Control Panel enables to create a list of related or equivalent words.

Creating a Synonym

To create a Synonym, carry out the following steps:

1. From the Administration menu, click **Synonym Engine.** The Synonym Engine page is displayed.

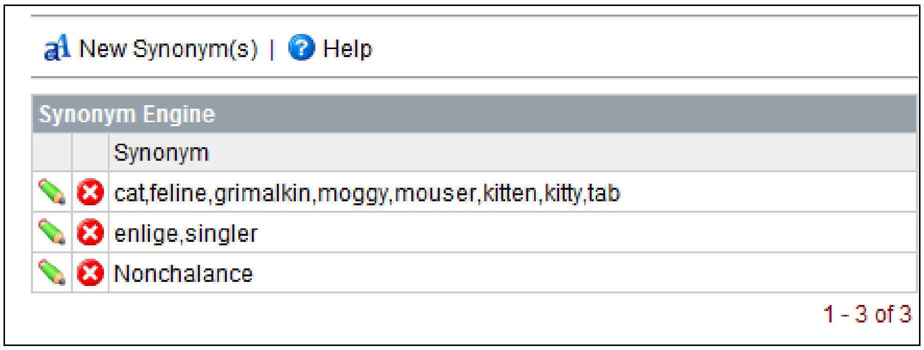


Figure 355 Synonym Engine

2. Click **New Synonym(s).** Create Synonym(s) page is displayed.

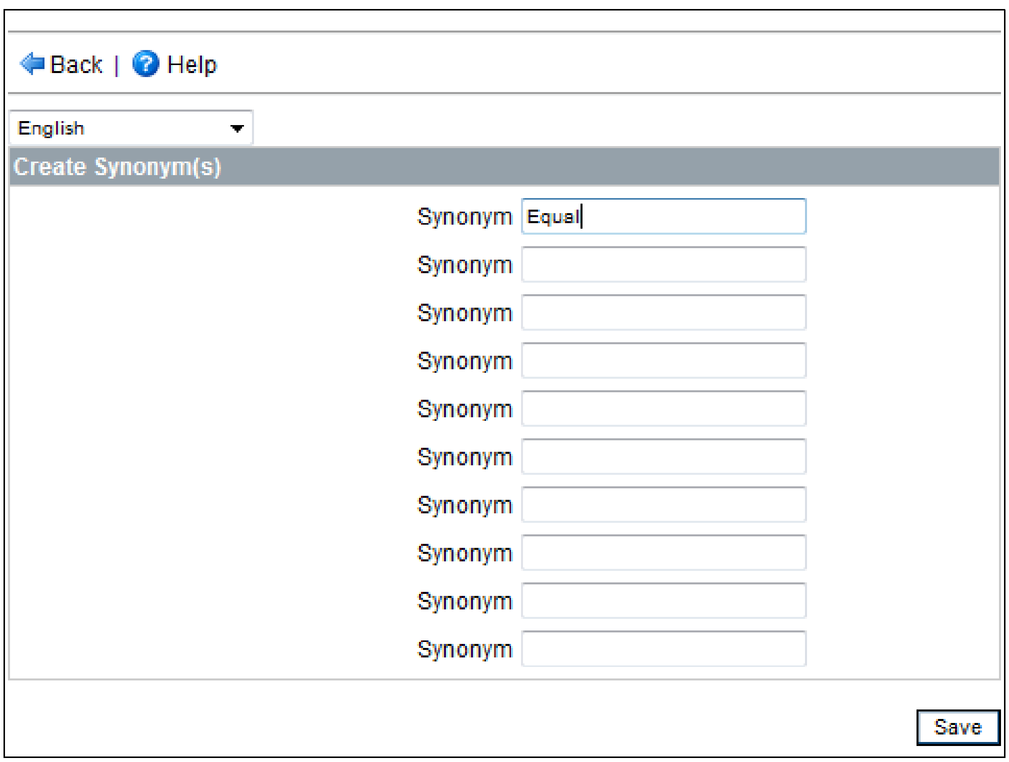


Figure 356 Create Synonym(s)

3. Enter a new word in the Synonym field.
4. Click **Save**

Editing a Synonym

To edit a Synonym, carry out the following steps:

1. From the Administration menu, click **Synonym Engine**. The Synonym Engine page is displayed.
2. Click next to the synonym you want to edit. The Edit Synonym page is displayed.

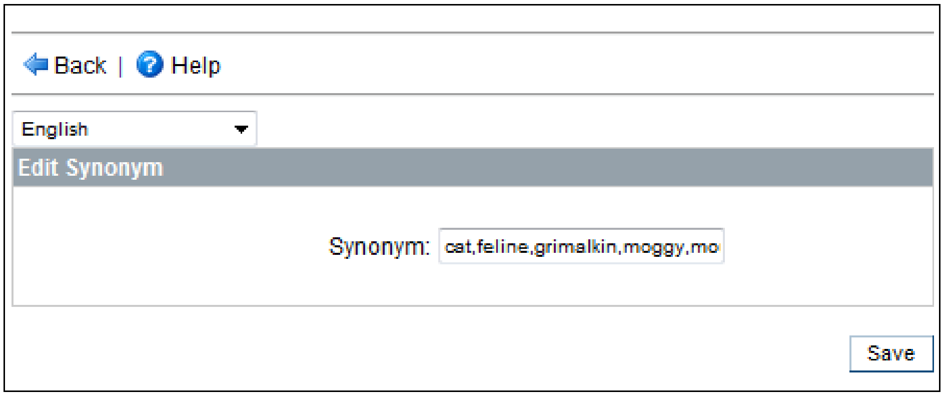


Figure 357 Edit Synonym

3. Modify the word
4. Click **Save.**

Deleting a Synonym

To delete a synonym, carry out the following steps:

1. From the Administration menu, click Synonym Engine. The Synonym Engine page is displayed.
2. Click next to the word you want to delete. A confirmation message is displayed.

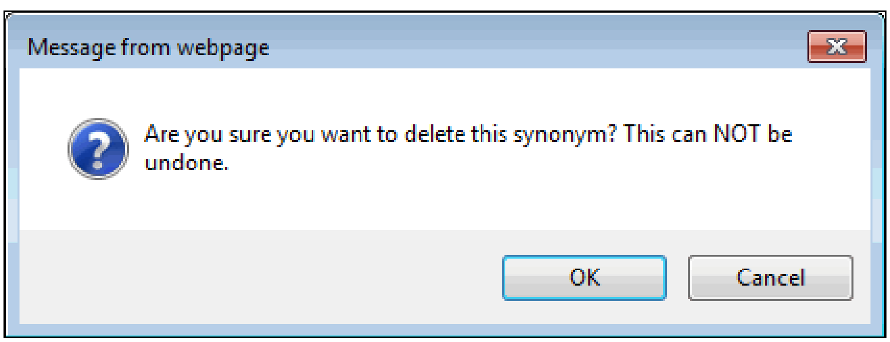


Figure 358 Confirmation Message

3. Click **OK.**

E-mail Administration

This section introduces you to E-mail Administration in Moxie Knowledge Spaces Admin Control Panel

About E-mail Administration

The E-mail Administration section of Knowledge Spaces™ Admin Control Panel provides the necessary tools and resources to setup and manage Article Notification settings and E-mail options.

Note:

- You must be granted the **Email Admin** permission to access the Email Administration functionality.
- You must also be granted the Knowledge Base permission to set up the Email Admin functionality at the Knowledge Base level.

When you connect to the **E-mail Administration** section, you see the Article Expiration settings on the Email Administration home page.

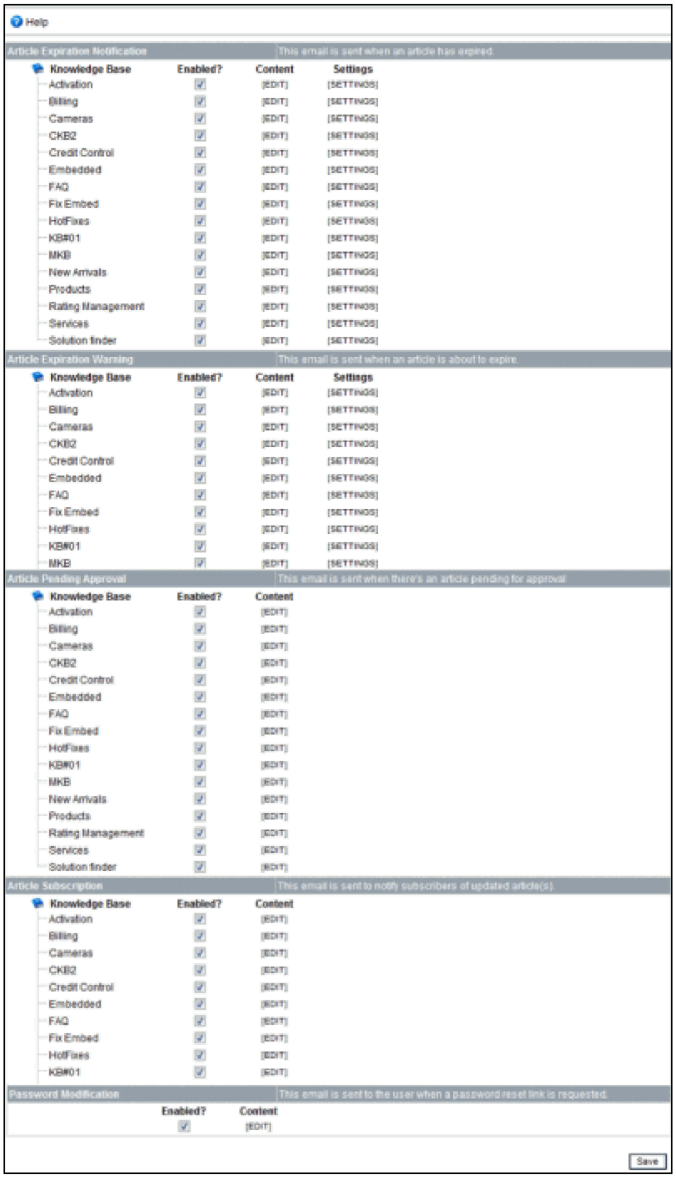


Figure 359 Email Administration Page

When an Article is created in the Article Management area of Knowledge Spaces™ Admin Control Panel, an Article Expiration Date can be assigned for the Article. In the Email Administration section, you can choose to send E-mail warnings and Expiration notices. You can also customize the notification, and Email notices that are sent when an Article Expires.

Article Expiration Notification

The Article Expiration Notification is a way of informing Internal Users when an Article in a Knowledge Base has reached its Expiration Date. When an Article expires, it is no longer available for viewing in KB Portals. Use the Article Expiration feature to trigger the Notifications and customize the E-mail notice that is sent out when an Article expires.

On the Email Administration home page, in the **Article Expiration Notification** area is a listing of the current Knowledge Bases, indicated by the  Knowledge Base icon.

There are three categories you can choose from:

- Enabled
- Edit
- Settings

Enabled

If you want to turn on the Notification Expiration E-mail for any of your Knowledge Bases, click the check box in the Enabled column next to the Knowledge Bases that contain Articles that require Expiration Notification. Each time Articles in the selected Knowledge Base(s) expires, the Notification Email messages are sent to the specified Internal Users. If you do not enable a Knowledge Base, Expiration Email messages are not sent for the Articles in that Knowledge Base.

Note:

If you do not enable the Article Expiration Notification for a Knowledge Base, you can still enable individual Articles in the Knowledge Base to send the expiration Email. To do so, select the Notification option from the **Add New Property l**ist on the Article Properties page in the Article Management area.

Edit

After you have enabled a Knowledge Base to send the Article Expiration Notification, you must create the email text that is sent to the specified Users.

Click the **EDIT** link next to the Knowledge Base that you have enabled. A window will be displayed where you can type the text of the Notification email message and click Save to save the email message.

Settings

Use the **Settings** area to list the email addresses where you want the Expiration Notification email messages to be sent. Click the **Settings** link and specify the email addresses in the window displayed.

When the email Notifications are sent, the **article ID** and article title are included in the email message.

Article Expiration Warning

The Article Expiration Warning informs Internal Users before an Article in a Knowledge Base reaches its expiration date. When an Article expires, it is no longer available for viewing in KB Portals. If you, or one of your Internal Users must be informed before an Article expires, you must use the **Article Expiration Warning** feature to turn on the Notification and customize the email notice that is sent out before an Article expires.

In the **Article Expiration Warning** area is a list of your current Knowledge Bases, indicated by Knowledge Base icon.

There are three categories you can choose from:

- Enabled
- Edit

- Settings

Enabled

If you want to turn on the Article Expiration Warning email for any of your Knowledge Bases, click the check box in the Enabled column next to the Knowledge Base, that contain Articles for which the warning should be sent. Each time an Article in the checked Knowledge Base(s) is about to expire, the warning email messages are sent to the specified users. If you do not enable a Knowledge Base, warning email messages are not sent for the Articles within that Knowledge Base.

> **Note:**
>
> If you do not enable the Article Expiration warning for a Knowledge Base, you can still enable individual Articles in the Knowledge Base to send the Expiration warning email email. To do so, select the Notification option from the Add New Property list on the Article Properties page in the Article Management area.

Edit

After you have enabled a Knowledge Base to send the Article Expiration warning notification, you must create the email text that is sent to the specified Internal Users.

Click the edit link next to the Knowledge Base that you have enabled. A text window is displayed, type in the text of the warning email message and click **Save.**

Settings

Use the **Settings** area to list the email addresses where you want the Expiration Warning Email messages to be sent. Click the **Settings** link, and specify the Email addresses in the text window.

> **Note:**
>
> When the Email notifications are sent, the article ID and article title are included in the Email message.

Article Subscription Option

From the Portal, Externals Users can subscribe to Articles to be notified through Email when an Article is updated. You can turn on the Article Subscription for the Knowledge Bases by selecting the check boxes in the **Enabled** column next to the Knowledge Bases. When an Article is updated, and an Internal User triggers notification, an Email message is sent out to the subscribers. The Administrator can also customize the Email message template.

> **Note:**
>
> After an author updates an Article, there is a link on the Article Properties page, the author can click the link to notify the subscribers. You can edit the subscriber template for subscriber notification.

To Edit the Subscriber Template

1. In the **Article Subscription** section of the **Email Administration** page, select the **Knowledge Base** and click **Edit.** The **Edit Template for: Article Subscription** page is displayed.

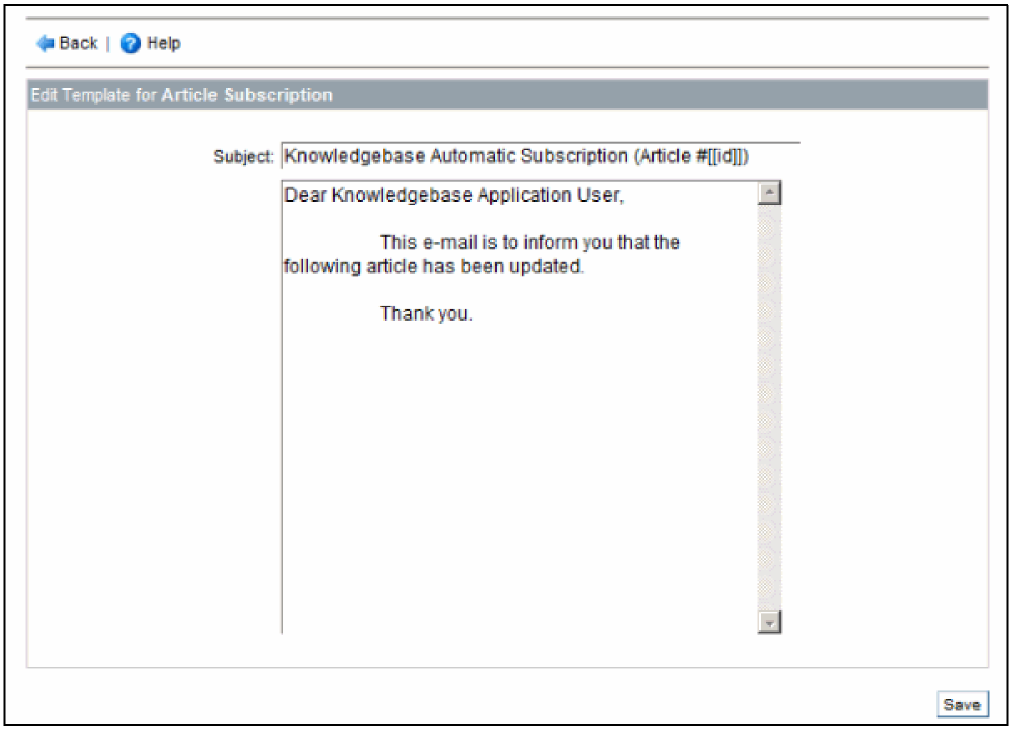


Figure 360 Edit Template for Article Subscription Page

2. In the **Subject** field, type the changes you want to make to the display.
3. In the text box below the Subject field, type the message you want to send to the subscriber.
4. Click **Save**.

Password Modification

The **Password Modification** is a way of informing Internal Users when their password to login in to the Knowledgebase application is changed. You can turn on the Password Modification by selecting the check box in the **Enable** column. The Administrator can also customize the Email message template.

To Edit the Password Modification Template

1. In the **Password Modification** section of **Email Administration** page, click **Edit**. The **Edit Template for Password Modification** page is displayed.

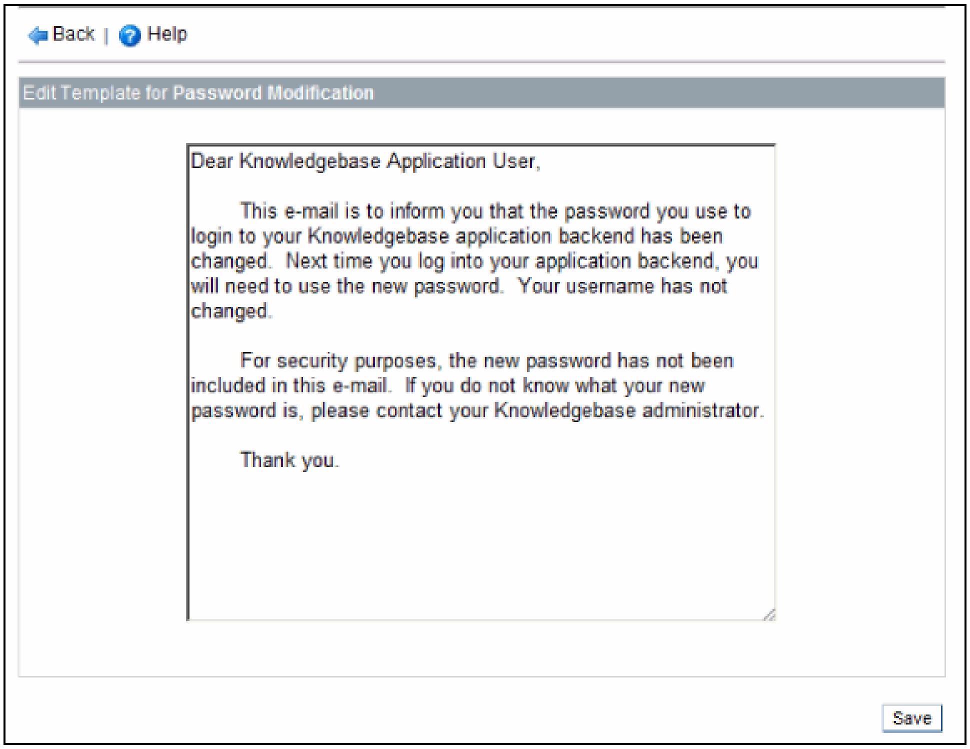


Figure 361 Edit Template for Password Modification page

2. In the text window displayed, type the text of the Password Modification Email.
3. Click **Save** to save the Email message.

Search Engine Administration

This chapter introduces you to Search Engine Administration in Moxie Knowledge Spaces Admin Control Panel.

This book introduces you to Search Engine Administration in Spaces by Moxie™ - Knowledge Spaces™ Admin Control Panel.

About Search Engine Administration

The Search Engine Administration section of the Administration tab enables you to monitor the Search Engine integrated with Knowledge Spaces™ and to maintain the Search Engine in its optimum condition.

1. In the Moxie Knowledge Spaces Admin Control Panel Home page, click **Administration** > **Search Engine Administration**. The **Search Engine Administration** page is displayed.

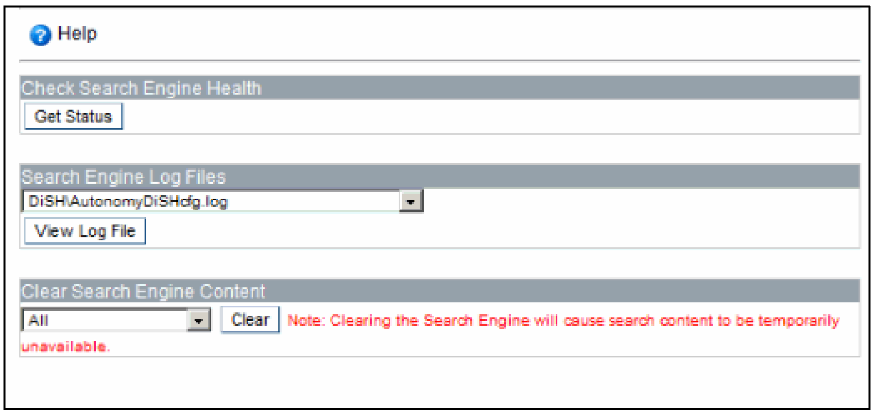


Figure 362 Search Engine Administration Page

The following table describes the options available in the **Search Engine Administration** page:

Option	Description
Get Status	From the **Check Search Engine Health** area, click the **Get Status** to view the current configuration settings, and the status of the Search Engine child processes. **Note:** Before checking the Search Engine health, ensure that you have added the IP address of the computer from which you want to check the Search Engine Health into the **(AutonomyIDOLServer.cfg file in the <Moxie Knowledge Spaces Installation>KnowledgeBase.Net\Autonomy\IDOLServer\IDOL\ path.)**
View Log File	From the **Search Engine Log Files** list, select the required log file, and click the **View Log** to view the information on the selected log file. The information facilitates the troubleshooting of any issues related with the search operation.

Option	Description
Clear Search Engine Content	The Clear Search Engine Content feature enables you to remove the unnecessary, or unused content associated with Knowledge Bases or Remote Sites from the Search Engine. **The Clear Search Engine Content list has the following three options:** • All • Knowledge Base Only • Remote Site Only Select the required option from the **Clear Search Engine Content** list, and click Clear to remove the content from the Search Engine.

System Settings

This chapter provides information about System Settings in Moxie Knowledge Spaces Admin Control Panel.

About System Settings

The System Settings section of the Administration tab enables you to set system settings for administrative functions such as:

- File type or Format upload
- File size upload
- IP address settings
- Email notification templates.

> **Note:**
>
> You must be granted the **System Settings** permission to set system settings for administrative functions.

File Types

File Types are a list of file extensions and file formats that can be imported into the system as new Articles, Article attachments, or resources available in the Manager.

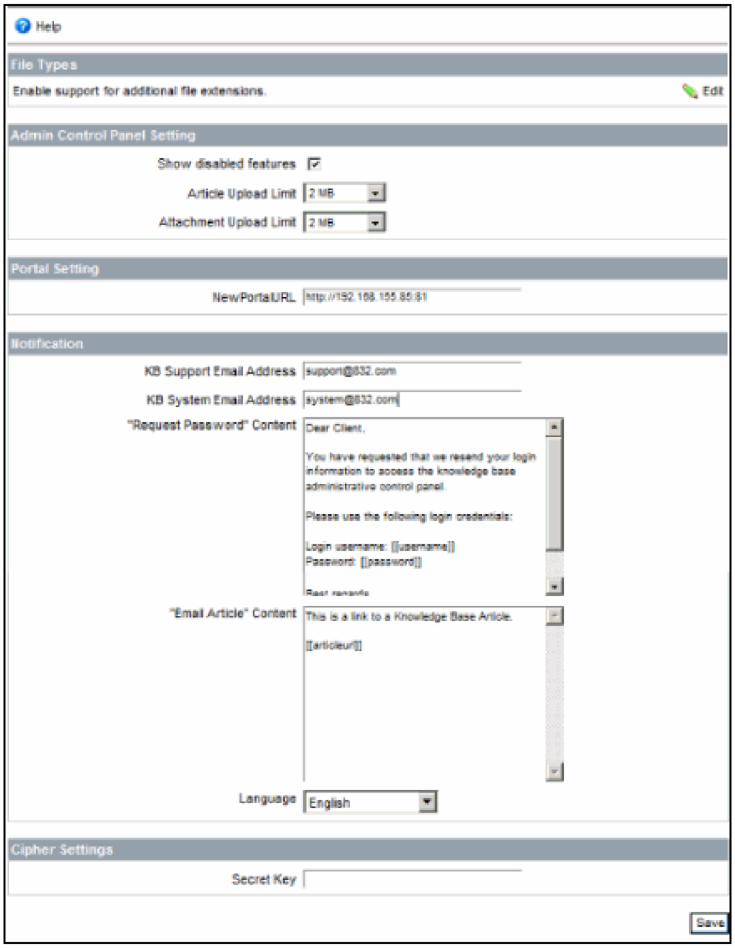


Figure 363 System Settings Page

In the **Secret Key** field, configure a security key to be used to encrypt and decrypt a Just In Time (JIT) Portal Entitlement package in the external Entitlement based system, and Knowledge Spaces™ Admin Control Panel respectively.

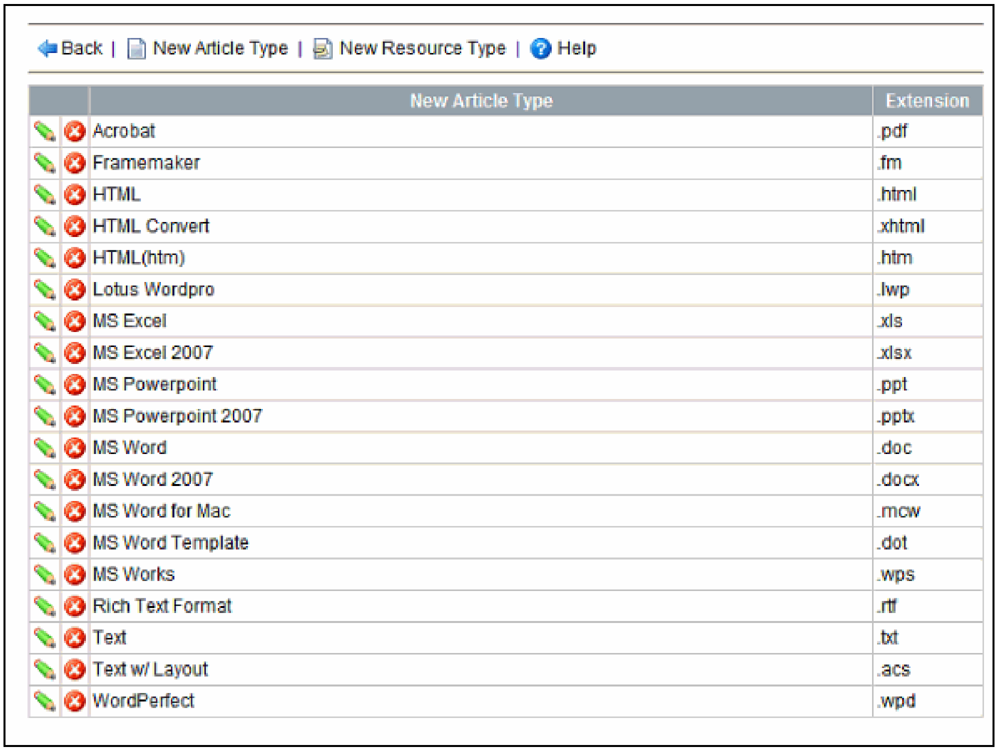
Note:

The security key is stored within the Secretkey column in the tb_knbEncryptDecrypt table of the ecrmkb database.

If you receive a message that you are uploading an invalid file type, or you are adding file extensions that cannot be imported as articles and/or attachments/resources, you can make these changes from the System Settings area.

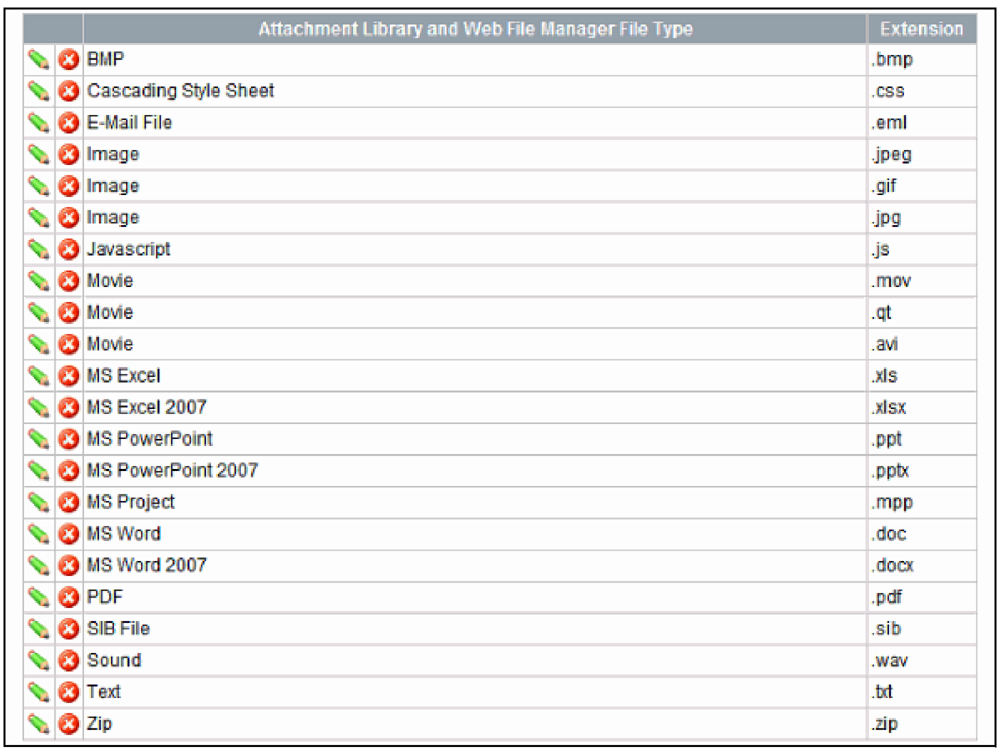
To Add New File Extensions

1. In the Knowledge Spaces™ Admin Control Panel Home page, click **Administration** > **System Settings**. The **System Settings** page is displayed.



New Article Type	Extension
Acrobat	.pdf
Framemaker	.fm
HTML	.html
HTML Convert	.xhtml
HTML(htm)	.htm
Lotus Wordpro	.lwp
MS Excel	.xls
MS Excel 2007	.xlsx
MS Powerpoint	.ppt
MS Powerpoint 2007	.pptx
MS Word	.doc
MS Word 2007	.docx
MS Word for Mac	.mcw
MS Word Template	.dot
MS Works	.wps
Rich Text Format	.rtf
Text	.txt
Text w/ Layout	.acs
WordPerfect	.wpd

Figure 364 File Extensions Page



Attachment Library and Web File Manager File Type	Extension
BMP	.bmp
Cascading Style Sheet	.css
E-Mail File	.eml
Image	.jpeg
Image	.gif
Image	.jpg
Javascript	.js
Movie	.mov
Movie	.qt
Movie	.avi
MS Excel	.xls
MS Excel 2007	.xlsx
MS PowerPoint	.ppt
MS PowerPoint 2007	.pptx
MS Project	.mpp
MS Word	.doc
MS Word 2007	.docx
PDF	.pdf
SIB File	.sib
Sound	.wav
Text	.txt
Zip	.zip

2. Click New Article Type or New Resource Type. The **New File Type** page is displayed.

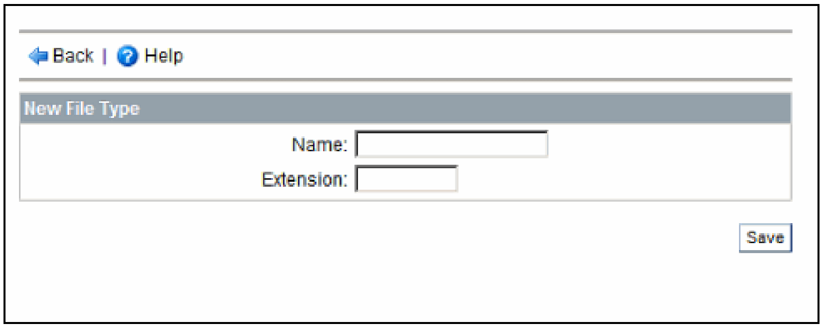


Figure 365 New File Type Page

3. Add the name of the file, and the extension of the file (e.g. .doc, .pdf).

> **Note:**
>
> The file extensions are case sensitive and must include the '.' along with the extension.

4. Click **Save.**

> **Note:**
>
> - To edit a File type, click to the left of the file type, type the change and click Save.
> - To delete a File type, click to the left of the file type, and click OK in the message box displayed.

KB Administrator Setting

Show disabled features - using the show disabled features control in Admin Control panel setting area, you can choose to show or hide the links and features that are not available to certain Internal Users. If you remove access to a certain feature, setting, or area in KB Administrator for an Internal User or Internal Access Profile, these links and settings can appear as either grayed-out or not appear at all. If you select to show the disabled features, these links and areas appear as grayed-out.

Article and Attachment upload limits - to set the maximum file size for Articles and attachments that can be uploaded into Knowledge Spaces™, you can use the menus to determine the size limits. If an Internal User attempts to upload a file that is larger than the allowed file size, they see an Exceeded Allowable File Size message.

Portal Setting

Portal URL - Use the text field in the portal setting area to specify the IP address of your Knowledge Spaces Portal server (this is the IP address for your KB Portal), e.g. http://xxx.xxx.xxx.xxx/

Notification

In the Notification area, you can create the from email addresses for email messages that are sent to users for various notification messages, and specify when Internal Users are notified to change their password.

There are two email address fields listed in the Notification area, one for support, and one for system. You can use the text fields to specify the from email addresses for both support and system. The support email notifies users when the passwords are changed. The system email address is for other email functions, such as workflow change notification, and article expiration or reminder email.

You can use the two text fields below the email address fields to create your email template content. The Request Password field contains the content that is sent to Internal Users when their password is changed. If you keep the [[username]] and [[password]] fields in the template, the username and password are automatically included in the email message.

The Email Article Content field contains the default content for mailing a link to an article from the right frame of the article view in the KB Portal. Keeping the [[articleurl]] field ensures that the correct links to the article are automatically included in the email template.

Chapter 5:Reports

This Chapter provides information about Knowledge Spaces™ Admin Control Panel Reports.

In this chapter

About Knowledge Spaces™ Reports

The **Reports** tab in Knowledge Spaces™ Admin Control Panel enables you to generate a variety of reports to gauge Knowledge Spaces usage from both an External User and Internal User perspective. You can run reports to track Article, Author, Workflow Status, Article Timeline, Article Performance, and more. You can choose numerous functions, and can mix and match your reports to generate the exact data you need.

The following table illustrates the Report tab in Knowledge Spaces™ Admin Control Panel:

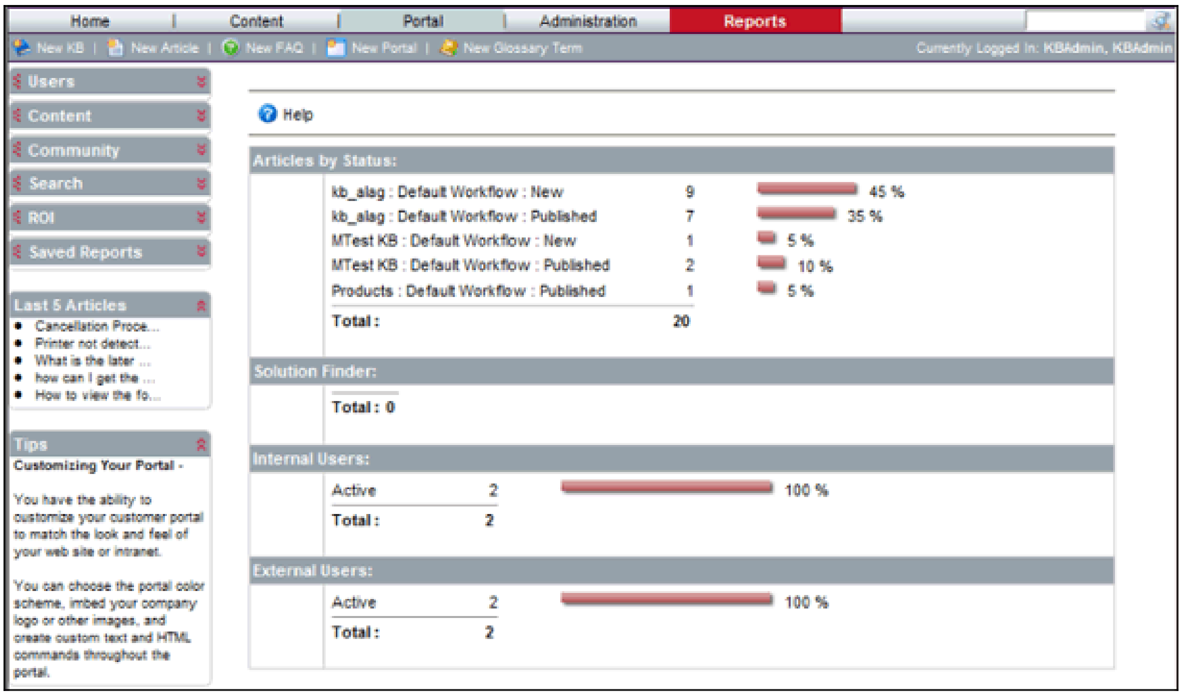


Figure 366 Reports Tab

Knowledge Spaces™ Reports include the following broad categories::

- Users
- Content
- Community
- Search
- ROI
- Saved Reports

Click  next to the Report section name to view the report type available within the section.

-Or-

Click  next to the section name to hide the report types listed in the section.

Choose the specific report that you would like to run by selecting the Report link within the appropriate section to the left on the Reports tab.

Every report in the system can be exported to Microsoft Excel by clicking the **Export To Excel** link.

> **Note**
>
> Reports include data pertaining to activities on portals designed in **Portal Style #4** and **Portal Style #5** (responsive portal). Exceptions if any in case of the responsive portal are indicated where ever applicable in the following sections.

Users Reports

The Users Reports menu includes the following reports:

- Accounts By Profile
- Feedback
- User Details
- User Summary
- Visitors
- User Activity

Accounts By Profile Report

The **Accounts By Profile** report displays the details of the Internal Users, and External Users created in Knowledge Spaces™ Admin Control Panel.

> **Note**
>
> You must be granted the **Accounts By Profile** option in the Internal Access Profile to be able the generate the Accounts By Profile report.

The **Accounts By Profile** report includes user information such as the Last Name, First Name, Department, Email Address, and the Profile assigned to the User. The following options are available to filter the Users to be listed in the report:

User Profile

From the **User Profile** menu, select the required User Profile name. The report generated will list the Users associated with the selected Profile. Select **All** if you want to list the Users associated with all Internal User Profiles, and External User Profiles.

Date Range

From the **Date Range** menu, select the required dates in the **From** and **To** lists for the report to list the Users created within a specific date range.

After specifying the report choices, click the **Run Report** button at the bottom right of the selection page. The report is generated. A sample **Users by Profile** report is shown in the following figure:

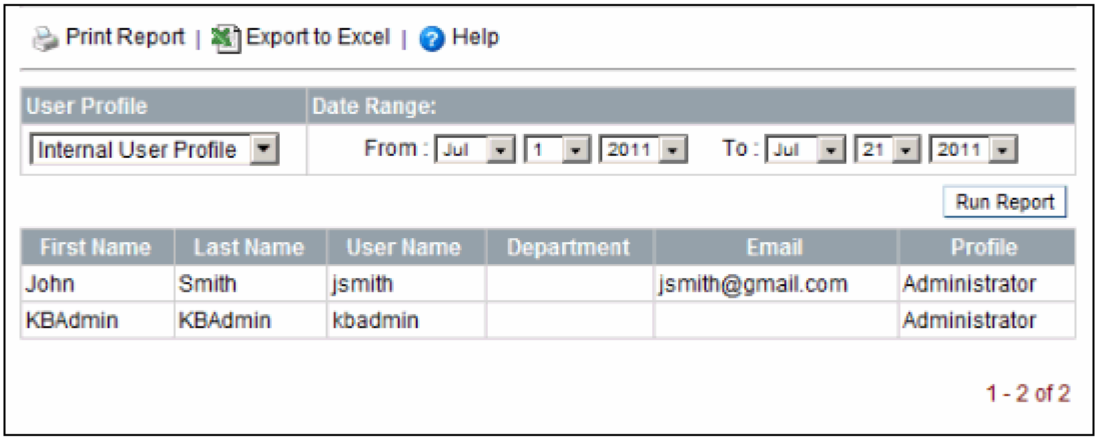


Figure 367 Accounts by Profile Report

Feedback Report

The Feedback report allows you to capture user comments and feedback on a per Article basis. The **User** section on the report main page enables you to generate a Feedback report for a selected External User. Additionally, when you select a user to generate the Feedback report, the **Number of last Articles viewed and last search** option is displayed which enables you to configure the number of last Articles viewed, and searched by the user to be displayed in the report.

> **Note**
>
> The maximum value that can be set for Number of last Articles viewed and last search is **9**.

The **Portal** list enables you to filter the user feedback submissions listed on the Feedback report main page by different Portals.

The **Knowledge Base**, **User**, and **Create Date** columns enable you to sort the feedback submissions on the Feedback report main page by the following conditions:

- The Knowledge Base from which the feedback submissions were sent.
- The Portal user who submitted the feedback.
- The date when the feedback submissions were sent.

To filter the Feedback submissions by a Portal, select the required Portal from the **Portal** list on the Feedback report main page. The Feedback submissions related to the Portal are listed on the page.

To sort the feedback submissions on the Feedback report main page by a Knowledge Spaces from which the feedback submissions were sent, in the **Knowledge Base** column, click on the Knowledge Base name by which you want to sort the feedback submissions listed on the page.

To sort the feedback submissions on the Feedback report main page by the Portal user who submitted the feedback, in the **User** column, click on the name of the user by whom you want to sort the feedback submissions listed on the page.

To sort the feedback submissions on the Feedback main page by the date when the feedback submissions were sent, in the **Create Date** column, click on the date by which you want to sort the feedback submissions listed on the page.

To sort by a certain date range, choose the selected date range from the menu, and click **Run Report**. Only the feedbacks in the selected date range are listed in the report.

The following figure shows a sample Feedback Report:

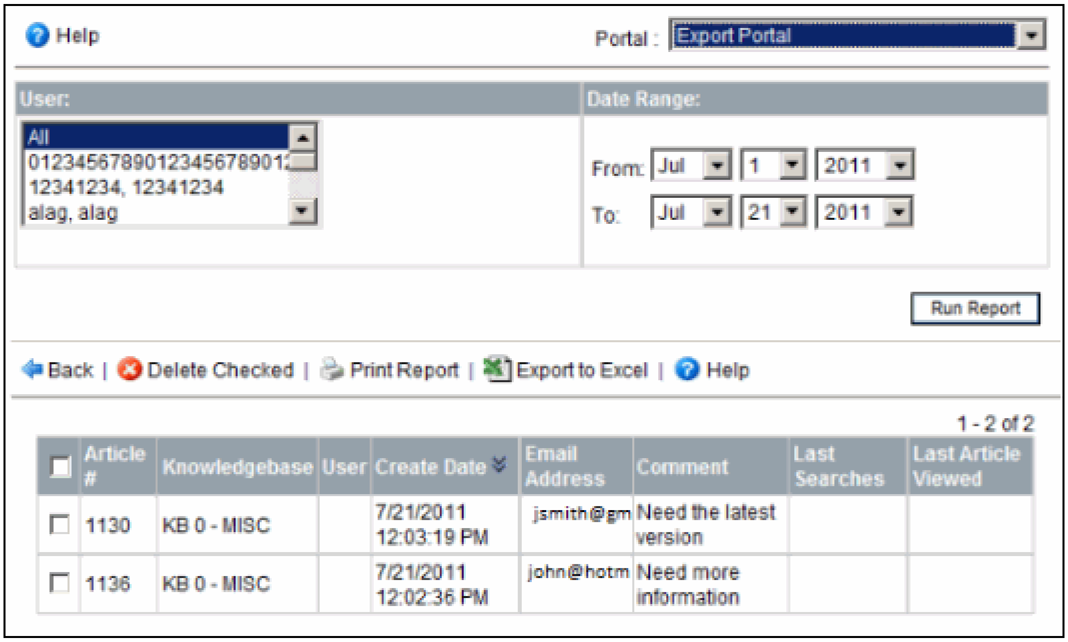


Figure 368 Sample Feedback Report

User Details Report

The User Details report displays articles that are created and edited by Internal Users. Choose the internal user from the window, and select the date range to run the report. When you are ready, click the **Search** button, and the report displays on the following screen.

From this screen, you can click the **Back** button to return to the previous screen, or you can click an article title to drill down and view the complete history of that article.

User Summary Report

The **Users** section of the Reports module provides Internal User activity tracking, based on activity type and activity date. You can use the features of this section to analyze the activity of your employees after they log into the Knowledge Spaces.

A list of Knowledge Spaces™ Admin Control Panel Internal Users, as well as any activity in which each user has participated, based on the selected date range are displayed.

The following list of activities are tracked in the Users section:

- Create Article
- Edit Article
- Delete Article

- Create Category
- Create Knowledge Spaces
- Create Glossary

The default user report that appears when you access the **Users** section shows all user activity for the current month.

At the top of the page is the **Date Range** field. You can choose to run a report for any date that you want using the menus in the **Date Range** field. Once you select the dates to run your report, click the Run Report button, and your new report displays below in the main frame of the page.

A list of all the current Active Internal Users, sorted by three categories, **User**, **Activity**, and **Count** displays. The User category provides a list of all current active users. The Activity category provides a list of all Knowledge Spaces™ Administrator activities by user during the selected time frame. The Count category lists the number of specific activities per user.

Visitors Report

The Visitors section of the Reports module provides Moxie Knowledgebase Customer Portal access statistics. For each active Moxie Knowledgebase Customer Portal, you can view the number of monthly visits.

At the top right of the Visitors page is a menu. All of your portals are listed in the menu. Choose a portal name from the menu, and you can call up the portal statistics displayed in the main frame of the page.

You can view the number of monthly visits to the portal, sorted by date and number of visits. Portal visits are represented both by number and by a red bar graph.

User Activity Report

Knowledge Spaces™ enables you to generate a report on the activities of the External Users on the Portal. The activity is tracked based on content viewed on the Portal, duration of session, etc. Thre report displays records for both Logged on or non logged on Portal Users.

The User Activity Report page provides various criteria that you can select to generate a report. You can also select the required **Sort**, and **Display** options based on how you want the information to be sorted, and displayed in the report.

Figure 369 illustrates the User Activity Report main page.

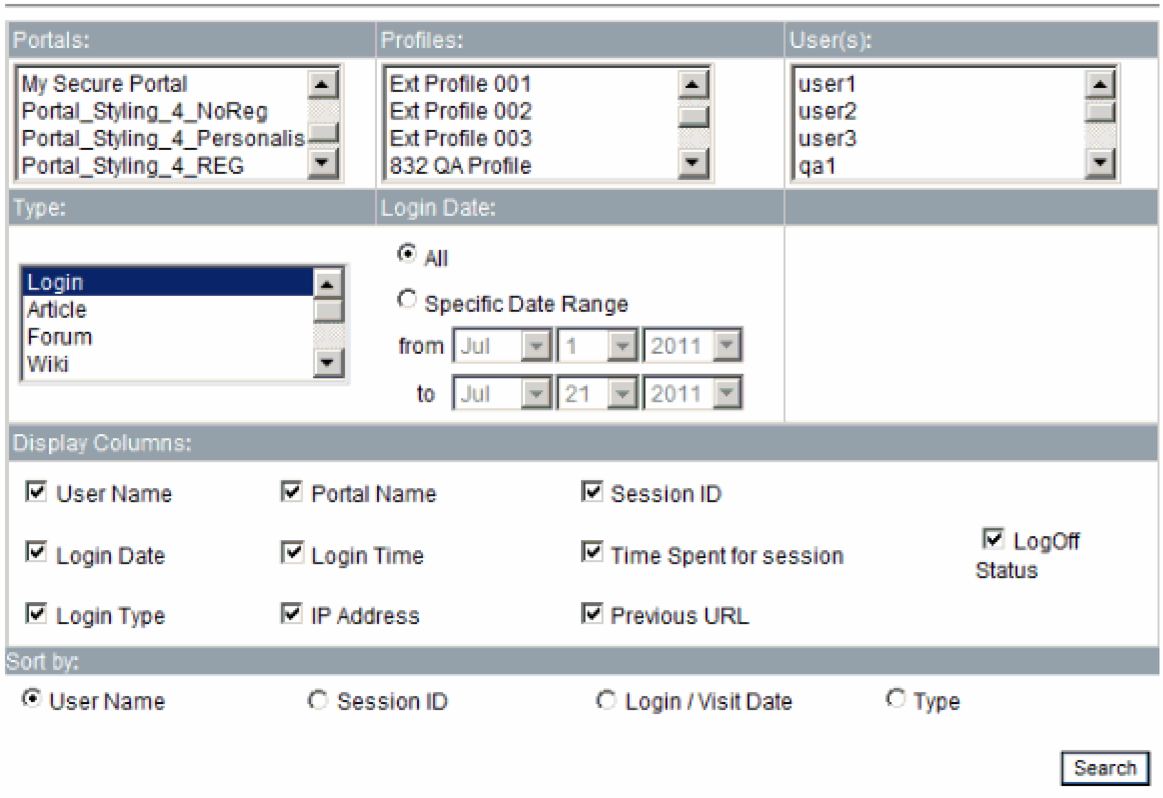


Figure 369 User Activity Report Main Page

The following options are available to filter the User Activities to be listed in the report:

Portals

From the Portals menu, select the **Portals** from which you want the User Activity to be listed in the report. If you want the report to list User Activity from multiple Portals, hold down the **Ctrl** key, and select the required Portals. Select **All**, if you want the report to include User Activity for all the Portals.

Profiles

From the Profiles menu, select the **Profile** for which you want the External User Activity to be listed in the report. If you want the report to list User Activity for multiple Profiles, hold down the **Ctrl** key, and select the required Profiles. Select **All**, if you want the report to include User Activity by all Profiles.

User(s)

From the **User(s)** menu, select the required External User. The report will list User Activity associated with the selected User. If you want the report to list multiple Users, hold down the **Ctrl** key, and select the required Users. Select **All**, if you want the report to include User Activity of all Users.

Type

The report will list the *Activity* performed by External Users based on the User Activity Type selected from the **Type** menu. For the report to include User Activity associated with multiple User Activity types, hold down the **Ctrl** key, and select the required User Activity Types.

The Activity Type options available are:

- Login
- Article

- Forum
- Wiki
- FAQ
- Solution Finder
- Glossary
- ATR

Login Date

For the User activity report by **Login :**

1. Select **All**, to list all activities irrespective of the time-frame when they occurred.
2. Select **Specific Date Range** to list activities posted within a date range, ,
3. Select the **from** and **to** dates for the range.

Report Display Columns

Each report type includes options to customize the display of information in the generated report. The options you select are displayed as columns in the report. The columns available for the Login report type is as described in Table 2:

Login Report	Select this option for the report to include...
User Name	Names of the External Users who performed User Activity on the Portal.
Login Date	The last login date for each of the User Activity.associated with the Portal.
Login Type	The Login method the User used to log on to the portal. The column displays the value as **KB Portal** as the User logged on to the Portal through the KB Portal login window.
Login Time	The last login time for each of the User Activity on the Portal.
IP Address	The IP Address of the computer the External User used to access the Portal.
Session ID	The report to include the unique ID generated for the User's login on the Portal.
Time Spent for Session	The duration of the External User's session.
Previous URL	The URL used by the External User used to access the Portal.
Portal ID	IDs of the Portal the External User accessed.
LogOff Status	The logout procedure the External User used to end the session on the Portal. Logoff Status can have one of the following values : • **True** : User explicitly selected logout. to end the session • **False** : Session expired without the user logging out.

Table 2 Columns - User Activity Report

The Display Columns available for Article, Forum and Wiki, FAQ, Solution Finder, Glossary and ATR are as listed in Table 3 and Table 4. These labels are self explanatory.

Article	Forum	Wiki	FAQ
User Name	User Name	User Name	User Name
Visit Date	Visit Date	Visit Date	Visit Date
Article ID	Forum Name	Search String	Search String
Search String	Search String	Search On	Search On
Search On	Search On	Portal Name	Portal Name
Portal Name	Portal Name	Visit Time	Visit Time
Visit Time	Visit Time	Search Type	Search Type
Attachment Viewed	Post Name	Search Area	Search Area
Search Type	Search Type	Wiki Name	Session ID
Search Area	Search Area	Search Filter	Search Filter
Session ID	Session ID	Search Result	Search Result
Search Filter	Attachment Viewed		FAQ
Search Result	Search Filter		
	Search Result		

Table 3 Columns - Article, Forum, Wiki and FAQ Reports

Solution Finder	Glossary	ATR
User Name	User Name	User Name
Visit Date	Visit Date	Visit Date
Search String	Search String	Search String
Search On	Search On	Search On
Portal Name	Portal Name	Portal Name
Visit Time	Visit Time	Visit Time
Search Type	Search Type	Search Area
Search Area	Search Area	Search Filter
Session ID	Glossary	Search Result
Search Filter	Session ID	
Search Result	Search Filter	
	Search Result	

Table 4 Columns - Solution Finder, Glossary, and ATR Reports

> **Note:**
>
> In case of the "User Activity > Article" Report
>
> - The report includes the search query (the string used prior to viewing the article) entered on the **home** or **search** page. If users entered search strings and viewed articles using the ***category browser,*** or by selecting an article from a widget, this column will contain blanks.
> - "Search Result" includes the ranking of the selected article(s) in the search results. For example, the one in row - 5 is ranked 5th.
> - "Search Area" uses "fulltext" for all searches on responsive portal
>
> The following columns will not include data resulting from user activity on the responsive portals:
>
> - Search Filter
> - Search On
>
> In case of the "User Activity > Solution Finder" report:
>
> The report includes the folowing:
>
> - Search String
> - Search Type
> - Search Result
>
> The report excludes the following:
>
> - Search Filter
> - Search On
> - Search Area

Sort By

The **Sort By** panel enables you to sort the report results based on a preferred option. For example, if you select **Login/Visit Date**, the User Activity performed last is listed first, and the User Activity performed first is listed at the end.You can sort the report by one of the following criteria:

- Login/Visit Date
- Session ID
- User Name
- Type

After specifying the report choices, display options, and sort criteria, click **Search** at the bottom right of the selection page. The report is generated. Figure 370 shows a sample User Activity report

Back | Print Report | Export to Excel | Help

User Activity Report

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User Name	Portal Name	Session ID	Login Date	Login Time	Time Spent for session	LogOff Status	IP Address	Login Type	Previous URL
	2nd	yuxqjl1uykze24	4/7/2014	06:26		False	[redacted]		http://10.10.138.246:82/v1AOScNwja/?cid=7&c=12&cpc=f730n
	Apps	g0n4py1oyxkuxn	4/2/2014	23:45		False	[redacted]		http://10.10.138.246:82/cid=1&c=12&cpc=12P0r8V12X/?cid=1&c=12&cpc=12P0:
	Apps	g0n4py1oyxkuxn	4/2/2014	23:45		False	[redacted]		http://10.10.138.246:82/cid=1&c=12&cpc=12P0r8V12XC&nc=/?cid=1&c=12&cpc=12P

Figure 370 User Activity Report

Content Reports

The Content Reports menu includes the following reports:

- Articles
- Article Hit Report
- Base and Derived
- FAQ
- Workflow

Articles Report

For the **Articles** report, you can choose from the reporting options listed in the 10 panels in this page.

- Knowledge Spaces

  The **Knowledgebase** panel is for selecting one, more than one or all knowledge bases for the report. If you have multiple Knowledge Bases, you can search them all by selecting **All**.
- Author

  The **Author** panel is for selecting from the drop-down list of Internal Users who are ‘authors of articles in the knowledge base(s). You can select one, more than one or all *authors* for the report.
- Status

  The **Status** panel is for selecting articles based on Workflow status. The Workflow steps or status are available in the drop-down list. Select one, or all to run your report. Articles that are within the chosen Workflow step(s) will be listed in the report.
- Category

  The **Category** panel is for selecting articles based on their Categories. Select one, or all to run your report. Articles that are within the chosen category(ies) will be listed in the report.
- Group

  The **Group** panel is for selecting articles based on their Groups. Select one, or all to run your report. Articles that are within the chosen group(s) will be listed in the report..

- Date Panels - Create date, Modify date and Expiration date

  In these 3 date panel menus select **All Dates**, or a **Specific Range** to see reports of article activity without any time bar, or those within that date-range - respectively.

  Use the **Create** Date menu to for the report to contain a list of articles **created** on the selected date or the specific date-range.

  Use the **Modify Date** menu for the report to contain a list of articles **modified** on the selected date or the specific date-range.

  Use the Expiration Date menu for the report to contain a list of articles that will get tagged as expired on the selected date or the specific date-range.

- Display panel

  This is a check-list of all items that can be deployed as column headings in a Report. You can customize and format reports by selecting multiple display items in this panel. Click each check-box in this panel to select the display items. In the generated report, the selected items appear as columns headings.

Display Item & Column Heading	**Column contents in the report**
Article Number	The article ID is displayed for each Article.
Title	The Article title is displayed for each Article.
Author	The author name is displayed for each Article.
Status	The current workflow step is displayed for each Article.
Create Date	The date of Article creation is displayed for each Article.
Modify Date	The last date of article modification is displayed for each Article.
Expiration	The Article expiration date (if applicable) is displayed for each Article.
Group	The Group to which the Article belongs is displayed for each Article.
Category	The Category to which the Article belongs is displayed for each Article.
Hits	The number of times it was viewed through a Knowledge base portal is displayed for each Article.
Total Ratings	The total number of positive and negative ratings for articles.
Useful	The average of the rating given to the Article when viewed on the Portal.
Solved (%)	The percentage of the number of times the user clicks ***"issue is resolved"*** from the ATR.
Last Publisher	The name of the Internal User who has published the Article is displayed for each Article listed in the report.
Article Checkout	The status of the Article is displayed for each Article listed in the report. The status is **True** for a checked out Article, and **False** for a checked in Article.

Save Query | Save Results | Print Report | Export to Excel | Help

Articles Report

1 - 15 of 15

Article #	Title	Created By	Status	Date Created	Date Modified	Expiration	Group	Category	Hits	Total Ratings	Useful (%)	Solved (%)	Article Checkout	Last Publis
1013	IP Address Access Restrictions	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			2	0	0	0	False	KBAdmin, KBAdmin
1014	Knowledge Bases	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			1	0	0	0	False	KBAdmin, KBAdmin
1016	Portal Administration - Overview	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			1	0	0	0	False	KBAdmin, KBAdmin
1002	Portal Administration - Overview	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1003	Portal Types	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin,
1004	Responsive Portal	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin,
1005	Responsive Portal - Configuration File	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1006	Responsive Portal - Language File	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1007	Responsive Portal - CSS Files	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1008	Responsive Portal - Images	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1009	Responsive Portal - Script File	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1010	Article Template Body	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin
1011	Languages	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin
1012	Creating a Host Name	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin
1015	Enabling and Disabling the Portal Navigation and Breadcrumbs	KBAdmin,KBAdmin	Published	4/29/2014	4/29/2014	4/29/2014			0	0	0	0	False	KBAdmin, KBAdmin

Figure 371 Content > Articles - Report

Sort

You can set a sorting option for the report. For example, to list the articles from the ones that are viewed the most to the ones viewed the least, choose the **Number of Hits** option in the Sort menu. You can opt for a sort by any of the following criteria:

- Article Number
- Article Title
- Article Workflow Status
- Create Date
- Modify Date
- Expiration Date
- Article Group
- Category
- Hits
- Total Ratings
- Useful
- Solved (%)

- Last Publisher
- Article Checkout

After you set the criteria, click **Search** at the bottom right of the selection page. The generated report displays on the Article Results page. Figure 372 illustrates a sample Articles Report. The graphic is split for better readability.

Article Hit Report

The Article Hit Report provides Portal level reports of article view activity. There are two options available in this report.

1. By Portal - provides portal specific hit reporting of all articles that are available in the selected portal.
2. By Date Range - enables to you select a start and end date range to make your Article Hit Report more specific.

Base and Derived Articles Report

Moxie Software™ Customer Spaces Knowledgebase enables you to create, and maintain relationships between Articles. For example, if an Article in English is translated into multiple languages, you can link the translated Articles as Derived Articles of the Article in English which serves as the Base Article.

The Article Information page enables you to configure whether an Article is a Base Article, or a Derived Article.

The **Base And Derived** Report enables you to generate a detailed report on the Base, and Derived Articles created in Moxie Software™ Customer Spaces Knowledgebase. The Base And Derived Report page provides various criteria that you can select to generate a report. You can also select the required Sort, and Display options based on how you want the information to be sorted, and displayed in the report. You can generate the report with only Base Articles, or with both Base Articles and their Derived Articles.

The following options are available to filter the Articles to be listed in the report:

Knowledge Base

From the **Knowledge Base** menu, select the Knowledge Base(s) from which you want the Base, or Base and Derived Articles to be listed in the report. If you want the report to list Articles from multiple Knowledge Bases, hold down the **Ctrl** key, and select the required Knowledge Bases. Select **All**, if you want the report to include Base, or Base and Derived Articles present in all the Knowledge Bases.

Author

From the **Author** menu, select the required author names. The report will list the Base, or Base and Derived Articles associated with the selected author name(s). If you want the report to list Articles created by multiple authors, hold down the **Ctrl** key, and select the required authors. Select **All**, if you want the report to list the Base, or Base and Derived Articles created by all authors.

> **Note**
>
> In the **Author** menu, a deleted Internal User is grayed, and suffixed with an asterisk (*).

Status

From the **Status** menu, select the required Workflow steps. The report will list the Base, or Base and Derived Articles associated with the selected Workflow step(s). To select multiple Workflows, hold down the **Ctrl** key, and select the required Workflows. Select **All** if you want the report to list the Base, or Base and Derived Articles associated with all the available Workflows.

Create Date

From the **Create Date** menu, select a date range for the report to list the Base, or Base and Derived Articles created within a specific date range. Select **All Dates**, if you want the report to list all the Base, or Base and Derived Articles. To generate a report with Articles created within a date range, select **Specific Range**, and select the required dates in the **from** and **to** lists.

Modify Date

From the **Modify Date** menu, select a date range for the report to list the Base, or Base and Derived Articles that were modified within a specific date range. Select **All Dates**, if you want the report to list all the Base, or Base and Derived Articles. To generate a report with Articles modified within a date range, select **Specific Range**, and select the required dates in the **from** and **to** lists.

Expiration

From the **Expiration** menu, select a date range for the report to list the Base, or Base and Derived Articles with the expiration date in a specific date range. Select **All Dates** if you want the report to list all the Base, or Base and Derived Articles. To generate a report with Articles that expired within a date range, select **Specific Range**, and select the required dates in the **from** and **to** lists.

Display

The **Display** area provides options to customize the display of information in the generated report. You can select the categories to be displayed when a report is generated. Each of the options you select is displayed as a unique column in the report.

- **Article Number** – Select this option to include the Article IDs for the Articles listed in the report.
- **Title** – Select this option to include the titles associated with the Articles.
- **Author** – Select this option to include the author details for each of the Articles listed in the report.
- **Status** – Select this option to include the Workflow step associated with each of the Articles listed in the report.
- **Create Date** – Select this option to include the Article creation date for each of the Articles listed in the report.
- **Modify Date** – Select this option to include the last modified date for each of the Articles listed in the report.
- **Expiration** – Select this option to include the expiration date for each of the Articles listed in the report. If you have not set an expiration date for an Article, the column in the report remains blank.
- **Hits** – Select this option to include the count of number of times an Article was viewed on the Portal.
- **Base Articles Only** – Select this option to generate the report listing only the Base Articles.
- **Base And Derived Articles** – Select this option to generate the report listing both the Base, and Derived Articles.

Sort

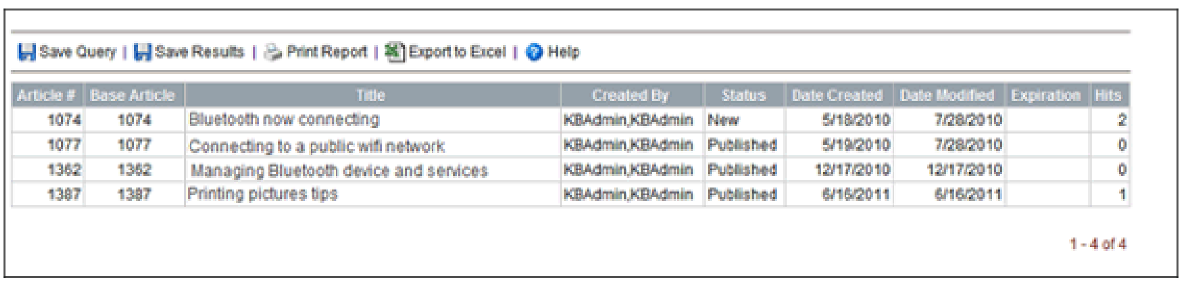
The **Sort** area enables you to sort the report results based on a preferred option. For example, if you select **Hits**, the Article most viewed on the Portal is listed first, and the Article least viewed on the Portal is listed at the end.

You can sort the report by one of the following criteria:

- Article Number
- Title
- Status
- Create Date
- Modify Date
- Expiration
- Hits

After specifying the report choices, display options, and sort criteria, click the **Search** button at the bottom right of the selection page. The report is generated.

The following figures show a sample report with Base Articles only, and a sample report with Base and Derived Articles:



Save Query | Save Results | Print Report | Export to Excel | Help

Article #	Base Article	Title	Created By	Status	Date Created	Date Modified	Expiration	Hits
1074	1074	Bluetooth now connecting	KBAdmin,KBAdmin	New	5/18/2010	7/28/2010		2
1077	1077	Connecting to a public wifi network	KBAdmin,KBAdmin	Published	5/19/2010	7/28/2010		0
1362	1362	Managing Bluetooth device and services	KBAdmin,KBAdmin	Published	12/17/2010	12/17/2010		0
1387	1387	Printing pictures tips	KBAdmin,KBAdmin	Published	6/16/2011	6/16/2011		1

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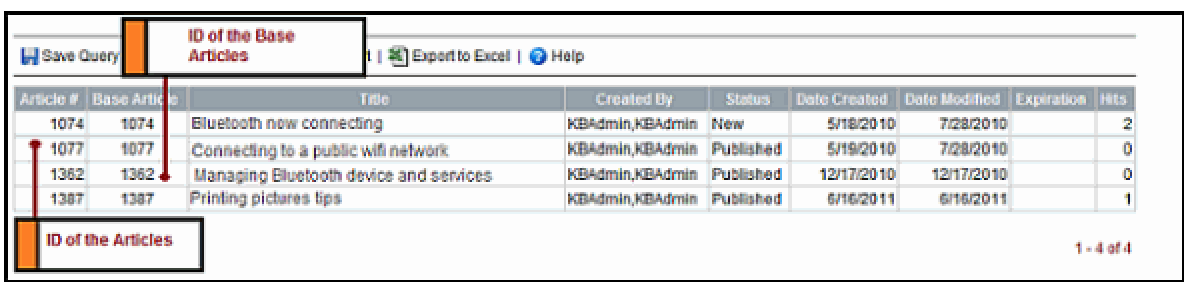
Figure 372 Sample Report Listing the Base Articles



Save Query | Export to Excel | Help

Article #	Base Article	Title	Created By	Status	Date Created	Date Modified	Expiration	Hits
1074	1074	Bluetooth now connecting	KBAdmin,KBAdmin	New	5/18/2010	7/28/2010		2
1077	1077	Connecting to a public wifi network	KBAdmin,KBAdmin	Published	5/19/2010	7/28/2010		0
1362	1362	Managing Bluetooth device and services	KBAdmin,KBAdmin	Published	12/17/2010	12/17/2010		0
1387	1387	Printing pictures tips	KBAdmin,KBAdmin	Published	6/16/2011	6/16/2011		1

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Figure 373 Sample Report Listing the Base and Derived Articles

FAQ Report

The FAQ Reports area displays the number of hits the Frequently Asked Questions (FAQ) receive.

All of the FAQ are listed here. They are prioritized by the FAQ that receive the most hits at the top and decreasing as they move down towards the bottom.

Workflow Report

The Workflow report allows you to report on internal users and their workflow activity. Choose an internal user, knowledgebase, the workflow step, and date range on the main page. When you are ready, click the **Search** button to run the report.

The Community Reports

The Community section on the Reports tab includes the following report builders:

- Forum Report Builder
- Wiki Report Builder

Forum Report Builder

Moxie Software™ Customer Spaces Knowledgebase enables External Users with necessary Forum permissions to contribute to the Forums on the Portal. The users can log on to the Portal to manage, and view Forums available on the Portal. The Forum page on the Moxie Software™ Customer Spaces Knowledgebase Customer Portal enables you to create, contribute, and manage Forums.

The Forum Report Builder enables you to generate reports on the Forums, Forum Threads, and Forum Posts created in Portals in Moxie Software™ Customer Spaces Knowledgebase. The Forum Report Builder page provides various criteria that you can select to generate a report. You can also select the required Sort, and Display options based on how you want the information to be sorted, and displayed in the report.

The following figure shows the Forum Report Builder main page:

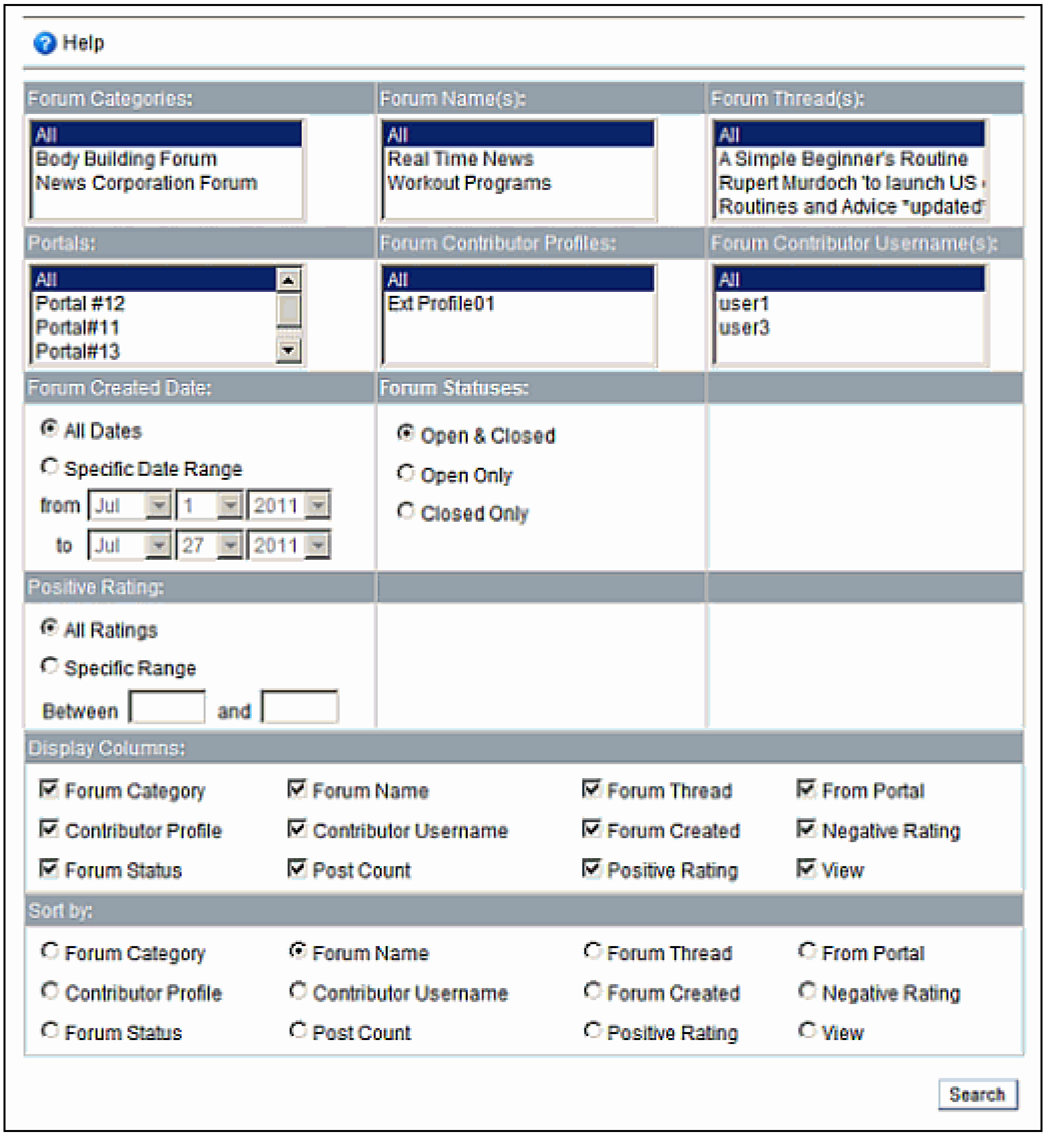


Figure 374 Forum Report Builder Main Page

The following are the options available to filter the Forums to be listed in the report:

Forum Categories

From the **Forum Categories** menu, select the Forum Category from which you want Forum to be listed in the report. If you want the report to list multiple Forum Categories, hold down the **Ctrl** key, and select the required Forum Categories. Select **All**, if you want the report to include Forums present in all Forum Categories.

Forum Name(s)

From the **Forum Name** menu, select the required Forum Name. The report will list the Forum Posts associated with the selected Forum Name. If you want the report to list multiple Forum Names, hold down the **Ctrl** key, and select the required Forum Names. Select **All**, if you want the report to include Posts present in all Forum Names.

Forum Thread(s)

From the **Forum Thread(s)** menu, select the required Forum Thread. The report will list Forum Threads associated with the selected Forum Thread. If you want the report to list multiple Forum Threads, hold down the **Ctrl** key, and select the required Forum Threads. Select **All**, if you want the report to include Post present in all Forum Threads.

Portals

From the Portals menu, select the **Portals** from which you want the Forum Posts to be listed in the report. If you want the report to list Forum Posts from multiple Portals, hold down the **Ctrl** key, and select the required Portals. Select **All**, if you want the report to include Posts present in all Portals.

Forum Contributor Profiles

From the Forum Contributor Profiles menu, select the required External Access Profile names. The report will list the Forum Posts posted by External Users with the selected External Access Profiles. If you want the report to list Forum Posts associated with multiple External Access Profiles, hold down the **Ctrl** key, and select the required External Access Profiles. Select **All**, if you want the report to include Forum Posts associated with all the External Access Profiles listed in the menu.

Forum Contributor Username(s)

From the Forum Contributor Username(s) menu, select the required External User names. The report will list the Forum Posts posted by the selected External Users(s). If you want the report to list Forum Posts associated with multiple External Users, hold down the **Ctrl** key, and select the required External Users. Select **All**, if you want the report to include Forum Posts associated with all the External Users listed in the menu.

Forum Created Date

From the **Forum Created Date** menu, select a date range for the report to list the Forum Posts created within a specific date range.

Select **All Dates**, if you want the report to list all the Forum Posts irrespective of the date when the Forum Post was created. To generate a report with Forum Posts created within a date range, select **Specific Date Range**, and select the required dates in the **from** and **to** lists.

Forum Post Date

From the **Forum Post Date** menu, select a date range for the report to list the Forum Posts posted within a specific range.

Select **All Dates**, if you want the report to list all the Forum Posts irrespective of the date when they were posted. To generate a report with Forum Posts posted within a date range, select **Specific Date Range**, and select the required dates in the **from** and **to** lists.

Forum Statuses

From the **Forum Statuses** menu, select the required Forum status. The report will list the Forum Posts set with the selected Forum Status.

Select **Open & Closed**, if you want the report to list all the Forum Posts irrespective of the status they are set to. To generate a report with Forum Posts set to open status, select **Open only** option, and to generate a report with Forum Posts set to closed status, set **Closed only** option.

Positive Rating

Positive Rating is the percentage of Postive rating received for the Posts within the Forum Thread. For example, if all the posts in a Thread have been rated a total of 100 times, and 98 of those ratings were positive, then the Positive rating will b 98%.

Select **All Ratings** if you want the report to list all the Forum Posts associated with a positive rating. To generate a report with Forum Posts associated with a specific positive rating range, select **Specific Range**, and specify the required rating in the **Between** and **and** fields.

Display Columns

The **Display Columns** provide options to customize the display of information in the generated report. You can select the categories to be displayed when a report is generated. Each of the options you select is displayed as a unique column in the report.

- Forum Category - Select this option to include the names of the Forum Categories associated with the Forum Posts listed in the report.
- Contributor Profile - Select this option to include the names of the External Access Profiles associated with the Forum Posts listed in the report.
- Forum Status - Select this option to include the status of the Forums associated with the Forum Posts listed in the report.
- Forum Name - Select this option to include the names of Forums associated with the Forum Posts listed in the report.
- Contributor Username - Select this option to include the names of the External Users associated with the Forum Posts listed in the report.
- Post Count - Select this option to include the count of number of Posts within the Forum Thread.
- Forum Thread - Select this option to include the names of the Forum Threads associated with the Forum Posts listed in the report.
- Forum Created - Select this option to include the creation date of the Forum Threads associated with the Forum Posts listed in the report.
- Positive Rating - Select this option to include the percentage of postivie rating received for the Posts within the Forum Thread.
- From Portal - Select this option to include the type of Security and Access Option set for the Portal to which the Forum Postings listed in the report belong.
- Post Date - Select this option to include the last modified date for each of the Forum Postings listed in the report.
- Negative Rating - Select this option to include the percentage of negative rating received for the Posts within the Forum Thread.
- View - Select this option to include the count of number of times the Forum Posts were viewed on the Portal.

Sort By

The Sort By area enables you to sort the report results based on a preferred option. For example, if you select **Post Date**, the Forum Post last posted is listed first, and the Forum Post modified first is listed at the end.

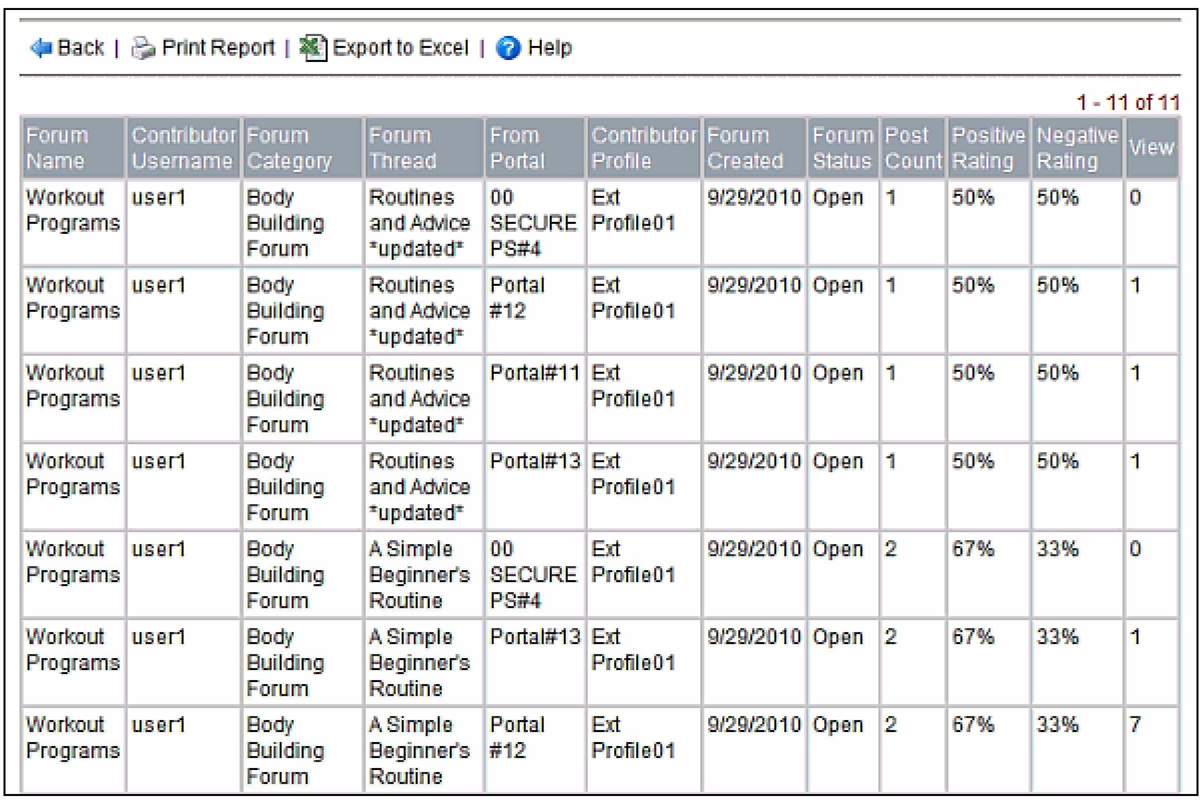
You can sort the report by one of the following criteria:

- Forum Category

- Contributor Profile
- Forum Status
- Forum Name
- Contributor Username
- Post Count
- Forum Thread
- Forum Created
- Positive Rating
- From Portal
- Post Date
- Negative Rating
- View

After specifying the report choices, display options, and sort criteria, click the **Search** button at the bottom right of the selection page. The report is generated.

The following figure shows a sample Forum Posts report:



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Forum Name	Contributor Username	Forum Category	Forum Thread	From Portal	Contributor Profile	Forum Created	Forum Status	Post Count	Positive Rating	Negative Rating	View
Workout Programs	user1	Body Building Forum	Routines and Advice *updated*	00 SECURE PS#4	Ext Profile01	9/29/2010	Open	1	50%	50%	0
Workout Programs	user1	Body Building Forum	Routines and Advice *updated*	Portal #12	Ext Profile01	9/29/2010	Open	1	50%	50%	1
Workout Programs	user1	Body Building Forum	Routines and Advice *updated*	Portal#11	Ext Profile01	9/29/2010	Open	1	50%	50%	1
Workout Programs	user1	Body Building Forum	Routines and Advice *updated*	Portal#13	Ext Profile01	9/29/2010	Open	1	50%	50%	1
Workout Programs	user1	Body Building Forum	A Simple Beginner's Routine	00 SECURE PS#4	Ext Profile01	9/29/2010	Open	2	67%	33%	0
Workout Programs	user1	Body Building Forum	A Simple Beginner's Routine	Portal#13	Ext Profile01	9/29/2010	Open	2	67%	33%	1
Workout Programs	user1	Body Building Forum	A Simple Beginner's Routine	Portal #12	Ext Profile01	9/29/2010	Open	2	67%	33%	7

Figure 375 Forum Posts Report

Wiki Report Builder

Moxie Software™ Customer Spaces Knowledgebase enables the External Users with necessary Wiki permissions to contribute to the Wikis on a Portal. The External Users can search for, and view the Wiki Articles available on the Portal. The users can also log on to the Portal to manage the Wikis on the Portal.

A Portal user with permissions to contribute to the Wikis can create new Wiki Articles, edit, and delete Wiki Articles, add, and delete tags from Wiki Articles, suspend and restore Wiki postings. An External User with permissions to manage Wikis can configure the Wikis that can be available on the Portal.

The Wiki Report builder enables you to generate a detailed report on the Wiki Articles created on Portals in Moxie Software™ Customer Spaces Knowledgebase. The Wiki Report Builder page provides various criteria that you can select to generate the report. You can also select the required Sort, and Display options based on how you want the information to be sorted, and displayed in the report.

The following figure shows the Wiki Report Builder main page:

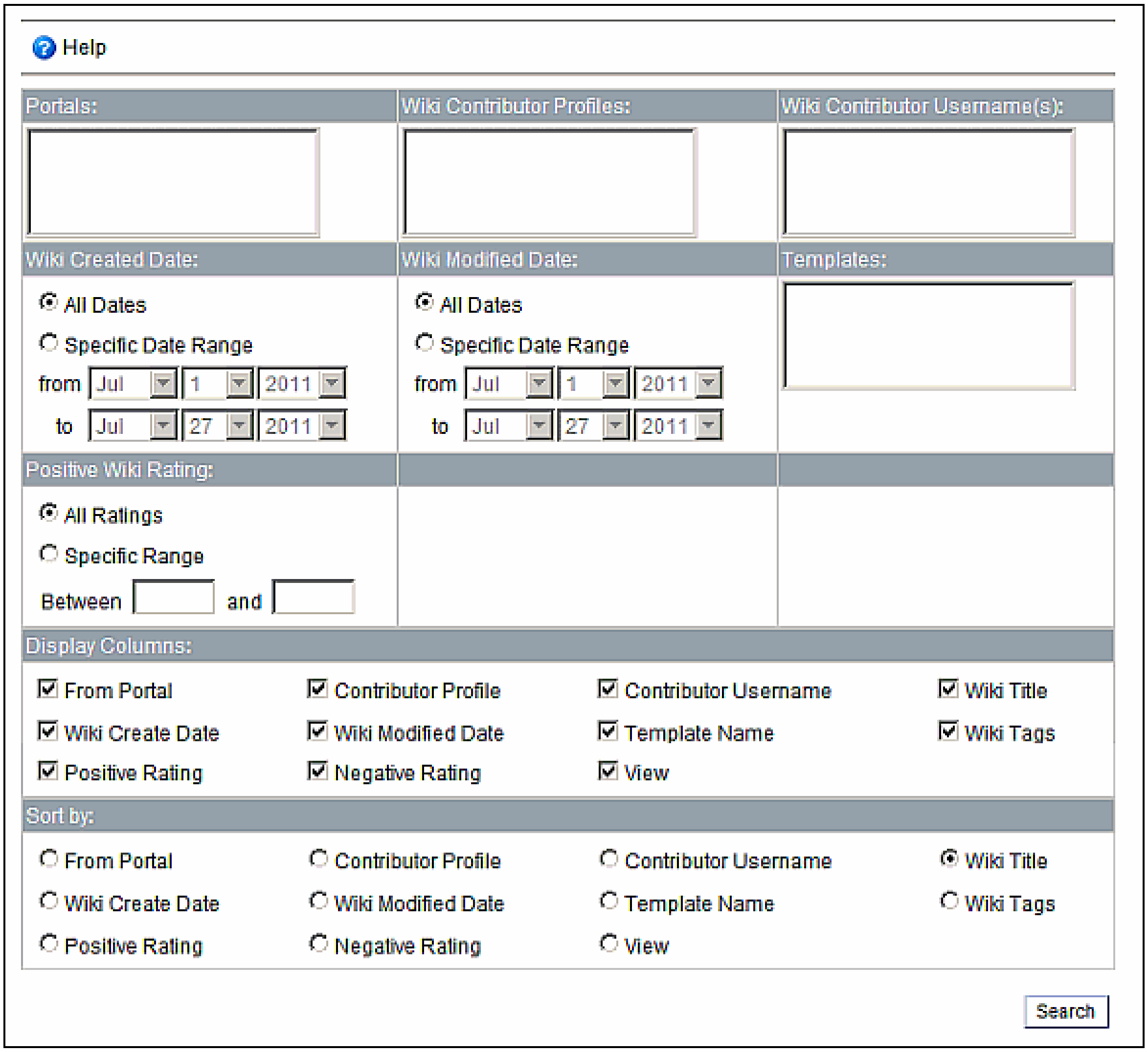


Figure 376 Wiki Report Builder Main Page

The following options are available to filter the Wiki Articles to be listed in the report:

Portals

From the **Portals** menu, select the Portal(s) from which you want the Wiki Articles to be listed in the report. If you want the report to list Wiki Articles from multiple Portals, hold down the Ctrl key, and select the required Portals. Select **All**, if you want the report to include Wiki Articles from all the Portals listed in the menu.

Wiki Contributor Profiles

From the **Wiki Contributor Profiles** menu, select the required external access profile names. The report will list the Wiki Articles associated with the selected external access profile(s). If you want the report to list Wiki Articles associated with multiple external access profiles, hold down the Ctrl key, and select the required external user profiles. Select **All**, if you want the report to list the Wiki Articles associated will all the external access profiles listed in the menu.

> **Note**
>
> The external access profiles listed in the **Wiki Contributor Profiles** menu change based on the Portals selected in the Portals menu. Only profiles with access to the selected portals will be displayed in the **Wiki Contributor Profiles** menu.

Wiki Contributor Username(s)

From the **Wiki Contributor Username(s)** menu, select the required External User names. The report will list the Wiki Articles associated with the selected External User(s). If you want the report to list Wiki Articles associated with multiple External Users, hold down the Ctrl key, and select the required External Users. Select **All**, if you want the report to list the Wiki Articles associated will all the External Users listed in the menu.

Wiki Created Date

From the **Wiki Created Date** menu, select a date range for the report to list the Wiki Articles created within a specific date range.

Select **All Dates**, if you want the report to list all the Wiki Articles irrespective of the date when the Article was created. To generate a report with Wiki Articles created within a date range, select **Specific Date Range**, and select the required dates in the **from** and **to** lists.

Wiki Modified Date

From the **Wiki Modified Date** menu, select a date range for the report to list the Wiki Articles that were modified within a specific date range. Select **All Dates**, if you want the report to list all the Wiki Articles irrespective of the date when the Article was modified. To generate a report with Wiki Articles modified within a date range, select **Specific Date Range**, and select the required dates in the **from** and **to** lists.

Templates

From the **Templates** menu, select the required Template(s). The report will list the Wiki Articles associated with the selected Template(s). To select multiple Templates, hold down the Ctrl key, and select the required Templates. Select **All** if you want the report to list the Wiki Articles associated with all the Templates listed in the menu.

Average Wiki Rating

From the **Average Wiki Rating** menu, specify the Wiki Article rating range. The report will list the Wiki Articles with the rating in the specified range. Select **All Ratings** if you want the report to list all the Wiki Articles associated with a rating. To generate a report with Wiki Articles associated with a specific rating range, select **Specific Range**, and specify the required rating in the **Between** and **and** fields.

Display Columns

The **Display Columns** area provides options to customize the display of information in the generated report. You can select the categories to be displayed when a report is generated. Each of the options you select is displayed as a unique column in the report.

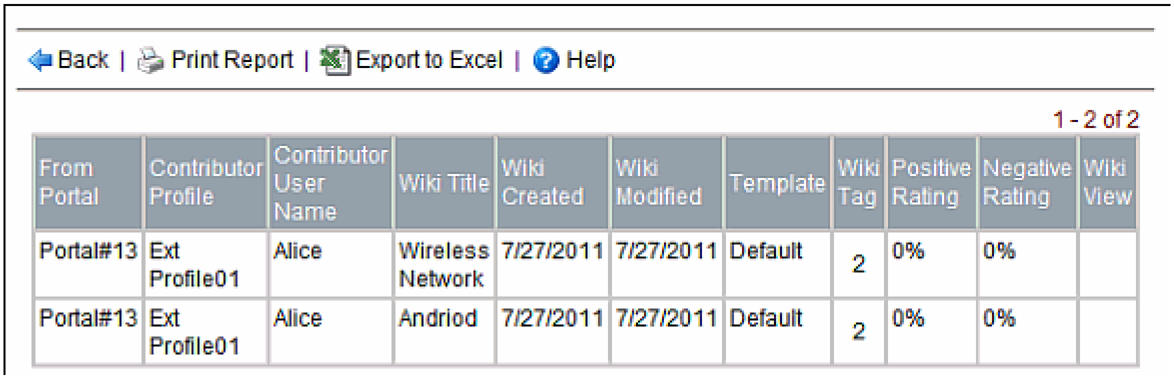
- From Portal – Select this option to include the Portal names for the Wiki Articles listed in the report.
- Contributor Profile - Select this option to include the names of the external access profiles associated to the Wiki Articles listed in the report.
- Contributor Username - Select this option to include the names of the External Users associated to the Wiki Articles listed in the report
- Wiki Title - Select this option to include the titles associated with the Wiki Articles.
- Wiki Create Date - Select this option to include the Article create date for each of the Wiki Articles listed in the report.
- Wiki Modified Date - Select this option to include the last modified date for each of the Wiki Articles listed in the report.
- Template Name - Select this option to include the Template Name associated to each Wiki Article listed in the report.
- Wiki Tags - Select this option to include the names of the tags associated to the Wiki Articles listed in the report.
- Average Wiki Ratings - Select this option to include the rating associated to each Wiki Article listed on the page.
- View - Select this option to include the count of number of users who viewed the Wiki Article on the Portal.

Sort

The **Sort** area enables you to sort the report results based on a preferred option. For example, if you select **Wiki Modified Date**, the Wiki Article last modified is listed first and the Wiki Article modified first is listed at the end. You can sort the report by one of the following criteria:

- From Portal
- Contributor Profile
- Contributor Username
- Wiki Title
- Wiki Create Date
- Wiki Modified Date
- Template Name
- Wiki Tags
- Wiki Rating
- View

After specifying the report choices, display options, and sort criteria, click **Search** on this page. The report is displayed as in the sample Wiki Articles report below.



Back | Print Report | Export to Excel | Help

1 - 2 of 2

From Portal	Contributor Profile	Contributor User Name	Wiki Title	Wiki Created	Wiki Modified	Template	Wiki Tag	Positive Rating	Negative Rating	Wiki View
Portal#13	Ext Profile01	Alice	Wireless Network	7/27/2011	7/27/2011	Default	2	0%	0%	
Portal#13	Ext Profile01	Alice	Andriod	7/27/2011	7/27/2011	Default	2	0%	0%	

Figure 377 Wiki Report

The Search Reports

The Search section on the Reports tab includes the following report builders:

- Unanswered
- Search Report
- ATR Report

Unanswered Search Report

This report allows you to view keywords and questions submitted by users, that return no results. The report lists the search string, search type, count and percentage of such occurrences.

Use this information to add keywords and/or questions to your existing articles to improve the search, or create new articles that answer the unanswered questions or unfound keywords.

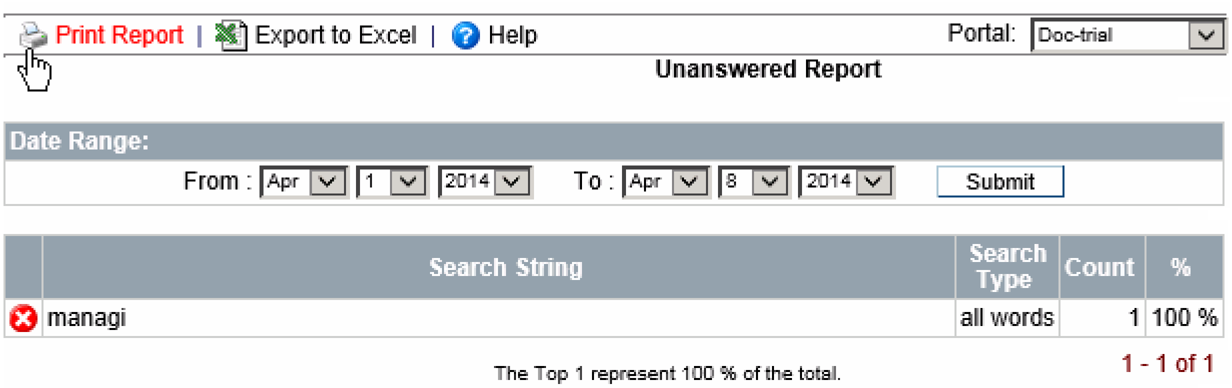


Figure 378 Unanwered Search Report

Search Report

With this feature you can track article hits by date range, and specific users viewing the articles. To run this report from the Reports tab:

1. Click **Search > Search Report** in the left pane.

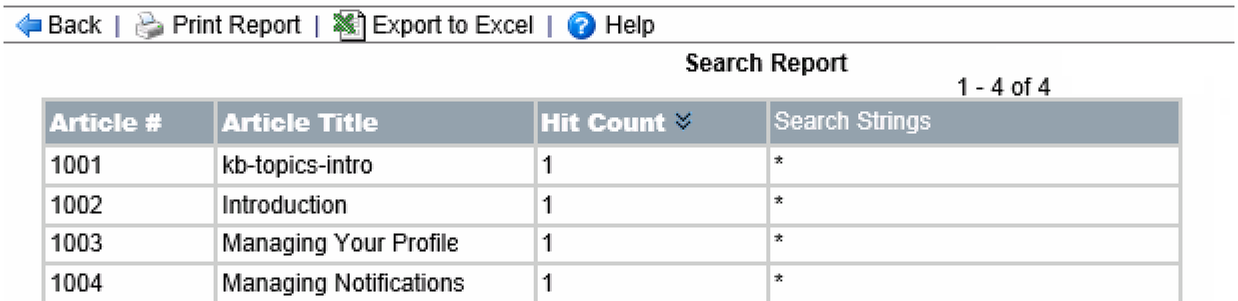
   The search report screen appears.

2. Enter the criteria for one of the following:

- date range
- user

3. Click **Submit**. The search report is displayed as in the sample below with the following data:
   - Hits - the number of times aan rticle was viewed from the search results page.
   - Search strings - the search text(query) submitted in the portal to search for articles. The * indicates that search was not not based on user query.

You can click the column headings to sort by the respective columns.



Back | Print Report | Export to Excel | Help

Search Report

1 - 4 of 4

Article #	Article Title	Hit Count	Search Strings
1001	kb-topics-intro	1	*
1002	Introduction	1	*
1003	Managing Your Profile	1	*
1004	Managing Notifications	1	*

Figure 379 Search Report

> **Note:**
>
> The Search report data helps administrators effectively manage their knowledge-bases. It includes
>
> - *activity* data from both portal types - *PS4* and *responsive*.
> - *search strings* submitted in the *responsive* portal

ATR Report

The ATR Report feature shows you a breakdown of all ATR submissions and who submitted them during a particular date range for any or all Portals.

The ROI Reports

The ROI section on the Reports tab includes the following reports:

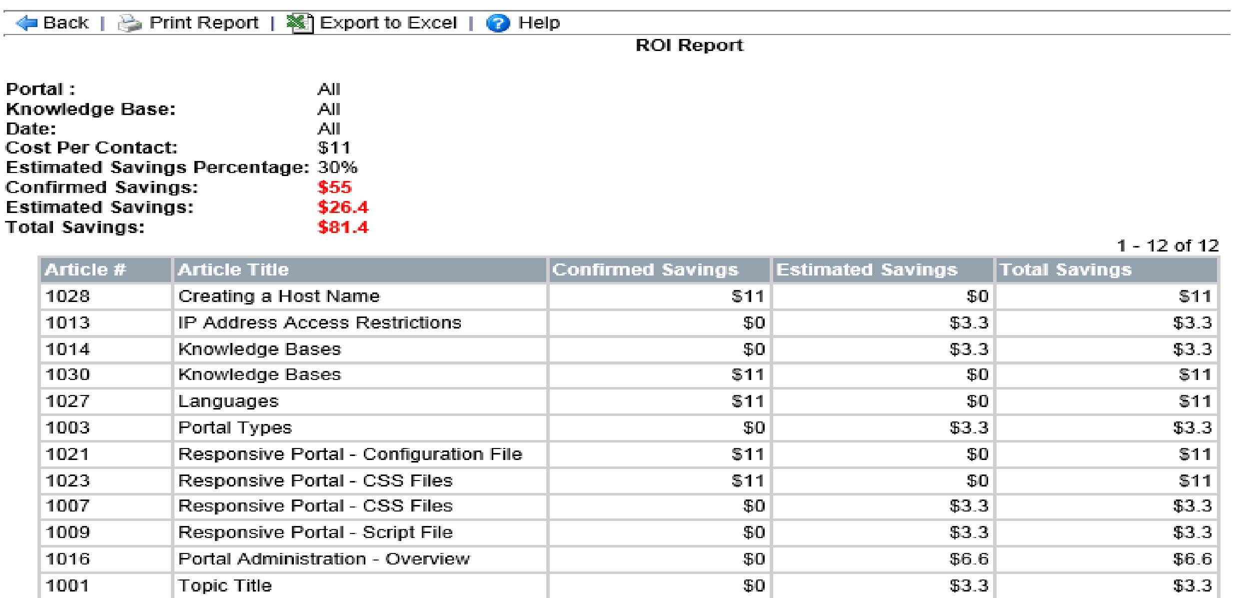
- ROI
- AdManager

Return on Investment Report

This report enables you to determine the actual cost savings resulting from using Knowledge Spaces™. The report uses an ROI calculator based on typical contact center services provided to external customers.

To run the ROI report:

1. From the Reports main menu, click **RoI**>RoI. The Return on Investment report screen is displayed.
2. Set the following options for this report:
    - Knowledge base
    - Portal
    - Data range
    - Cost per contact
    - Percentage
    - Sorted by article number or titles
3. Click **Search** to run the report. Your ROI metrics will be displayed.



Back | Print Report | Export to Excel | Help

ROI Report

Portal : All
Knowledge Base: All
Date: All
Cost Per Contact: $11
Estimated Savings Percentage: 30%
Confirmed Savings: $55
Estimated Savings: $26.4
Total Savings: $81.4

1 - 12 of 12

Article #	Article Title	Confirmed Savings	Estimated Savings	Total Savings
1028	Creating a Host Name	$11	$0	$11
1013	IP Address Access Restrictions	$0	$3.3	$3.3
1014	Knowledge Bases	$0	$3.3	$3.3
1030	Knowledge Bases	$11	$0	$11
1027	Languages	$11	$0	$11
1003	Portal Types	$0	$3.3	$3.3
1021	Responsive Portal - Configuration File	$11	$0	$11
1023	Responsive Portal - CSS Files	$11	$0	$11
1007	Responsive Portal - CSS Files	$0	$3.3	$3.3
1009	Responsive Portal - Script File	$0	$3.3	$3.3
1016	Portal Administration - Overview	$0	$6.6	$6.6
1001	Topic Title	$0	$3.3	$3.3

Figure 380 Sample ROI Report

The ROI calculation is described in detail in the table below.

Portal Data	Example	Definition
Total Hits	100	The number of times an article has been viewed.
Positive Rankings	25	The number of people who clicked the “thumbs up” button in Portal Style 4 or answered “yes” to the question “was this article helpful” in the new Portal.
Negative Rankings	10	The number of people who clicked the “thumbs down” button in Portal Style 4 or answered “no” to the question “was this article helpful” in the new Portal.
Estimated Savings	30%	This is the estimated percentage of people who viewed an article, but didn’t rank it, that had their question answered.
Cost per contact	$10	This is the estimated cost your organization incurs when a customer contacts you through an assisted channel (phone, email, chat).

Table 5 Sample ROI Calculator

In this example, the report will show the following information:

Row	Calculation	Definition
Confirmed Savings	$250	Positive Rankings x Cost per Contact 25 x $10.00 = $250
Estimated Savings	$195	((Total Hits - (Positive Rankings + Negative Rankings)) x Estimated Savings) x Cost Per Contact ((100 – (25+10)) x .30) x $10.00 = $195.00
Total Savings	$445	Confirmed Savings + Estimated Savings $250 + $195 = $445

Note:

This report shows activity from both PS4 and Responsive portals.

AdManager Report

The AdManager Report shows active advertisements by portal and date range. Details of the report include the Advertisement Name, Impressions (number of times returned in search results), Clicks, and the Click through Ratio. The Click through Ratio gives a rough estimate of the success of your Ad Manager Advertisement campaign.

The Integration Reports

The Integration section on the Reports tab includes the reports related to the KB integartion with an external application.

Saved Report

The Saved Reports feature allows you to track and access your saved reports and queries. You can save each report that you run and each report-generating query that you build. Use the "My Report" library to view and monitor the historical performance of your Moxie Software™ Customer Spaces Knowledgebase application.

To view the saved reports and queries, on the Reports main screen click **Saved Reports**. The Saved Reports screen appears. Double-click the report or query you want to view. The report or query displays. You can view or print the report or query.

Saving Reports

You use the Save Report Result window to save article reports after they are created.

To Save the Report that you just Generated

1. In the **Name** text field, type a **name** for your report.
2. To make this a restricted Personal Report, click the **Check Box** next to Personal Report.

   If the report is not a personal report, it is viewable by all internal users who have permission to access the Saved Reports area.
3. When you are done, click **Save**. The report is saved in the Saved Reports section of the Reports module.

   - OR -

   If you want to cancel the operation, click **Cancel**.

Save Report Query

Use the Save Report Query window to save your queries after they have been used to generate an article report. When you run a saved query, the same query generates a new report that contains the most up-to-date information that is available in the database.

To save the query that you just generated

1. In the Name text field, type a **name** for your query.
2. To make this a restricted Query, click the **Check Box** next to Query.

   If the query is not a personal query, it is viewable by all internal users who have permission to access the Saved Queries area.
3. When you are done, click **Save**. The report is saved in the Saved Queries section of the Reports module.

   - Or -

   If you want to cancel the operation, click **Cancel**.

Chapter 6: Sharepoint Search

This chapter provides you with detailed information about configuring Sharepoint Search in Knowledge Spaces™ Admin Control Panel.

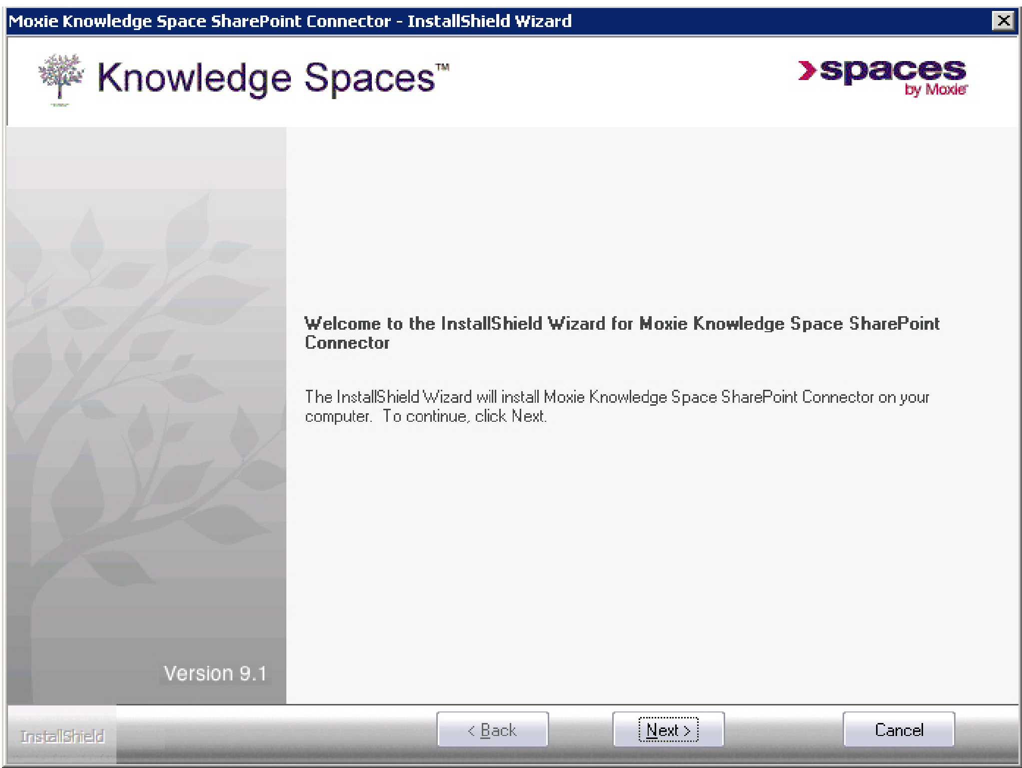
In this chapter

Overview

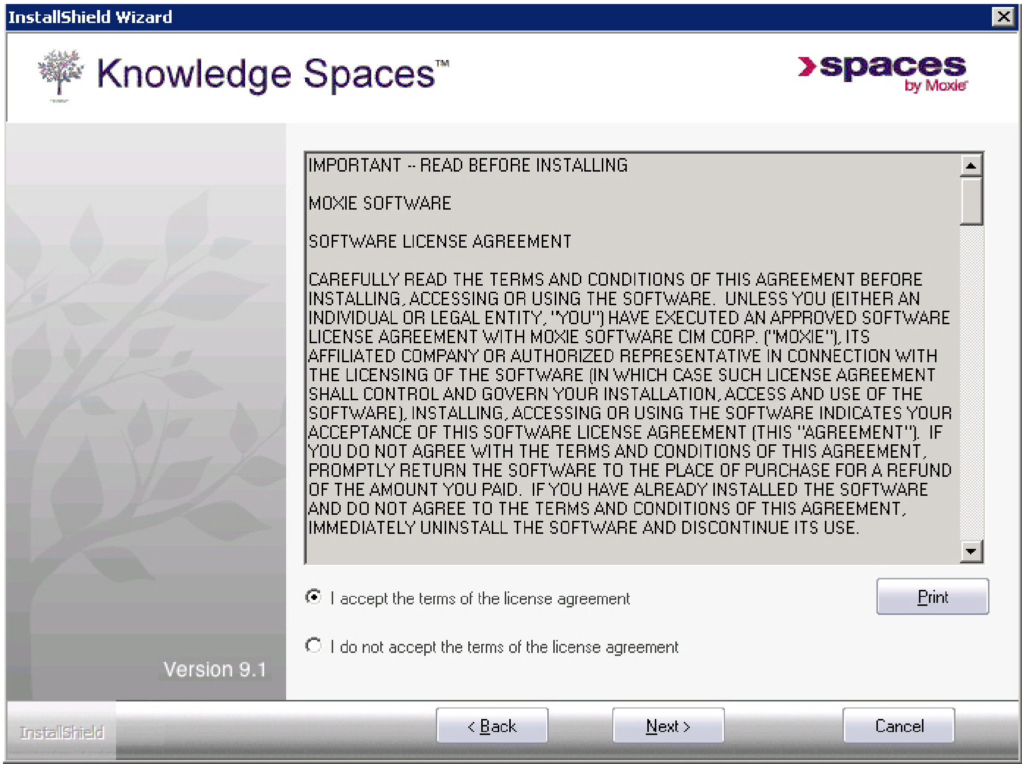
To configure SharePoint Search in Knowledge Spaces™, you must install the ***Knowledge Spaces™ - SharePoint Connector*** on the computer where **Microsoft Office SharePoint Server 2007** (termed as Microsoft SharePoint Server) is installed. The ***Knowledge Spaces™ - SharePoint Connector*** checks for the SharePoint Sites you configure in Knowledge Spaces™ Admin Control Panel, and fetches content from the configured Sites for Spaces by Moxie™ - Knowledge Spaces™ Search Engine to index. Knowledge Spaces Connector should be installed on the server where Admin component is installed and also on the server where Microsoft SharePoint server is installed.

Installing SharePoint Connector on Admin Server

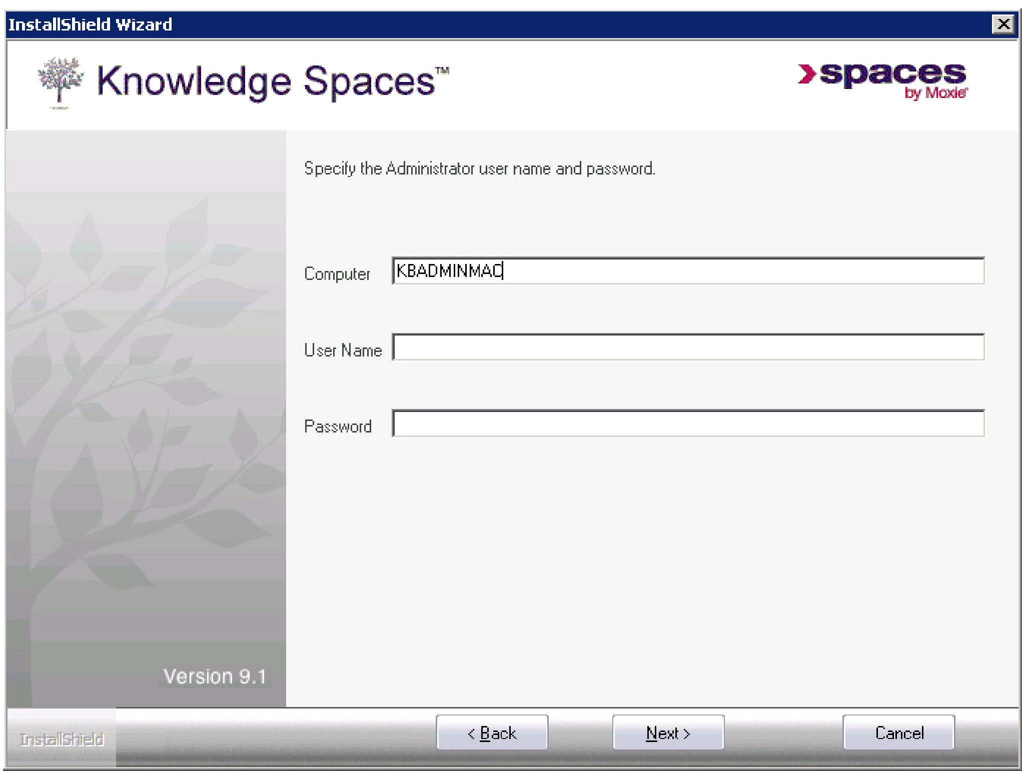
1. Download the **SharepointCFS - Knowledge Spaces 9.4.zip** file to a folder on the local drive, and unblock the zip file.
2. Extract the files in the **SharepointCFS - Knowledge Spaces 9.4.zip** file to any location on the local drive. Double-click **setup.exe**. The Welcome screen is displayed.



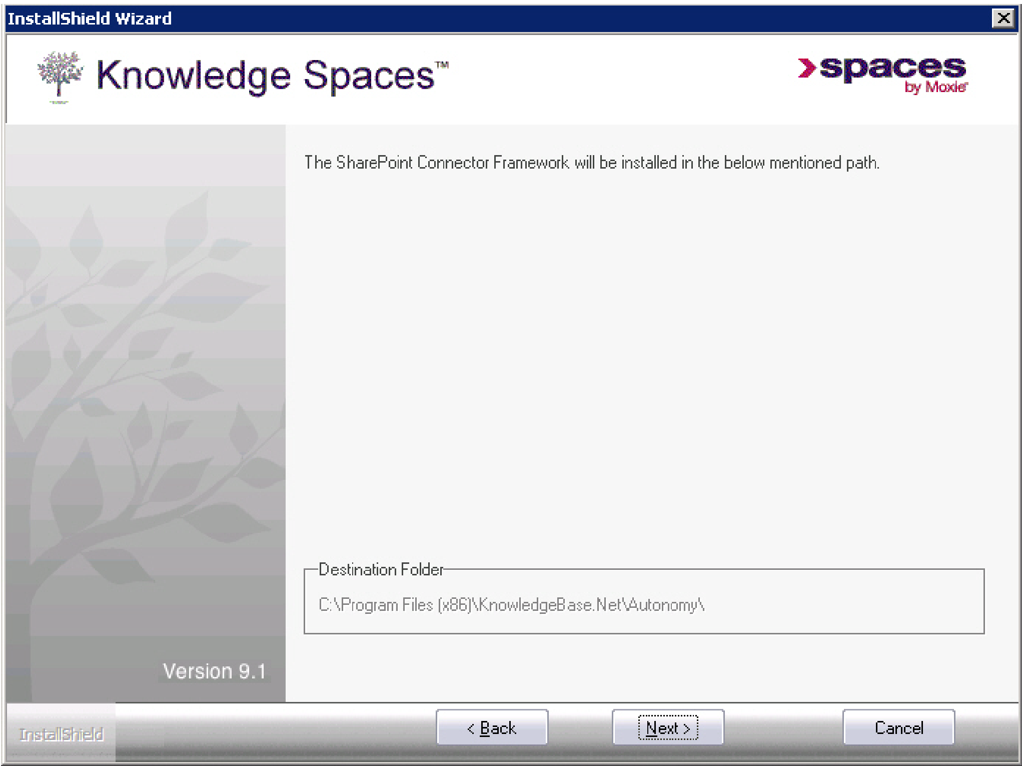
3. Click **Next**. The License Agreement screen is displayed.



4. Read the license agreement, and click **I accept the terms of the license agreement**.
5. Click **Next** to accept the license agreement. The following screen is displayed.

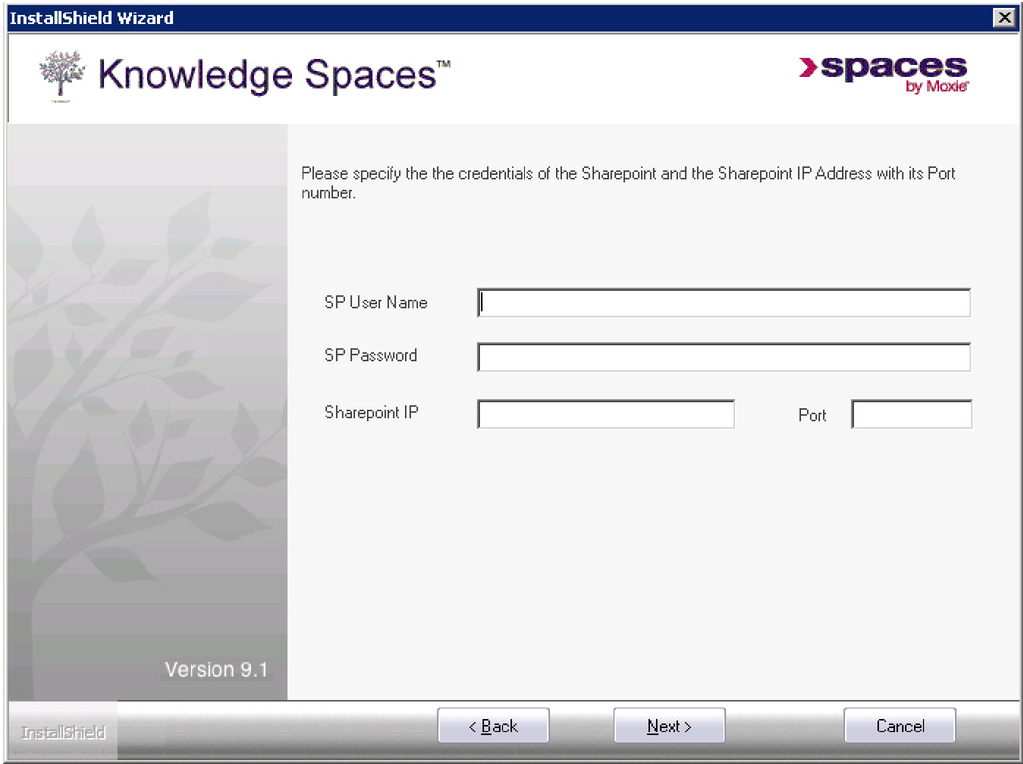


6. Do the following:
   - **Computer** – By default the local server name is displayed.
   - **User Name** – Type the administrator account name.
   - **Password** – Type the administrator password.
7. Click **Next** to continue. The destination location screen is displayed.

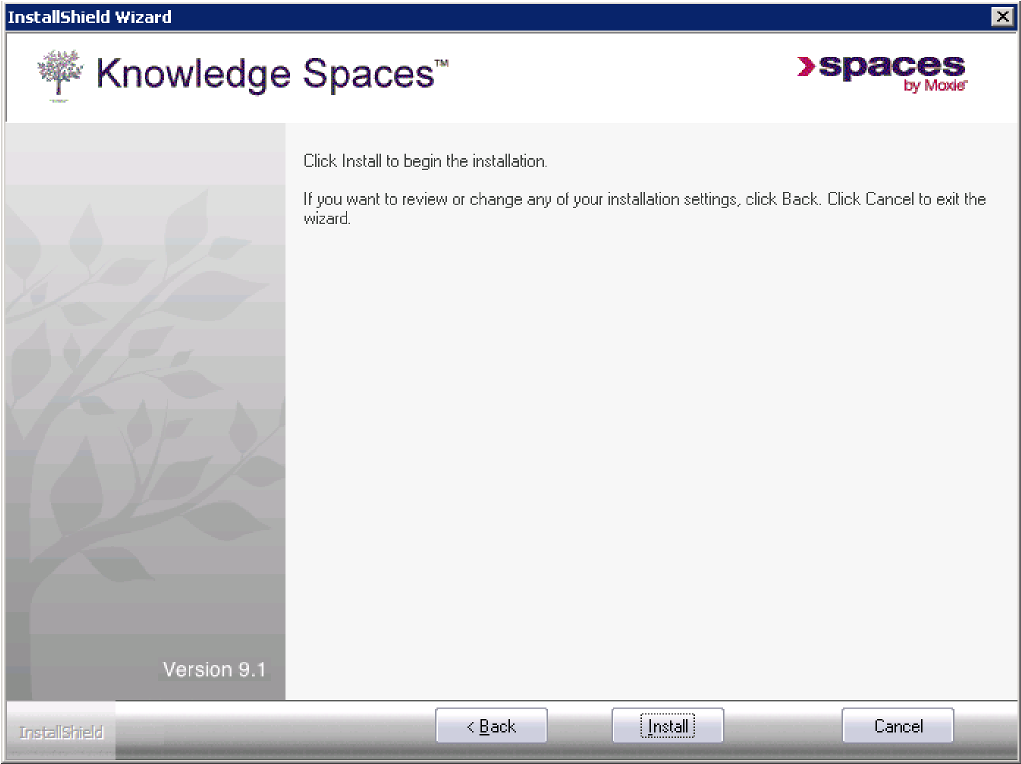


> **Note**
>
> The SharePoint Connector is installed in the path where Autonomy service is installed.

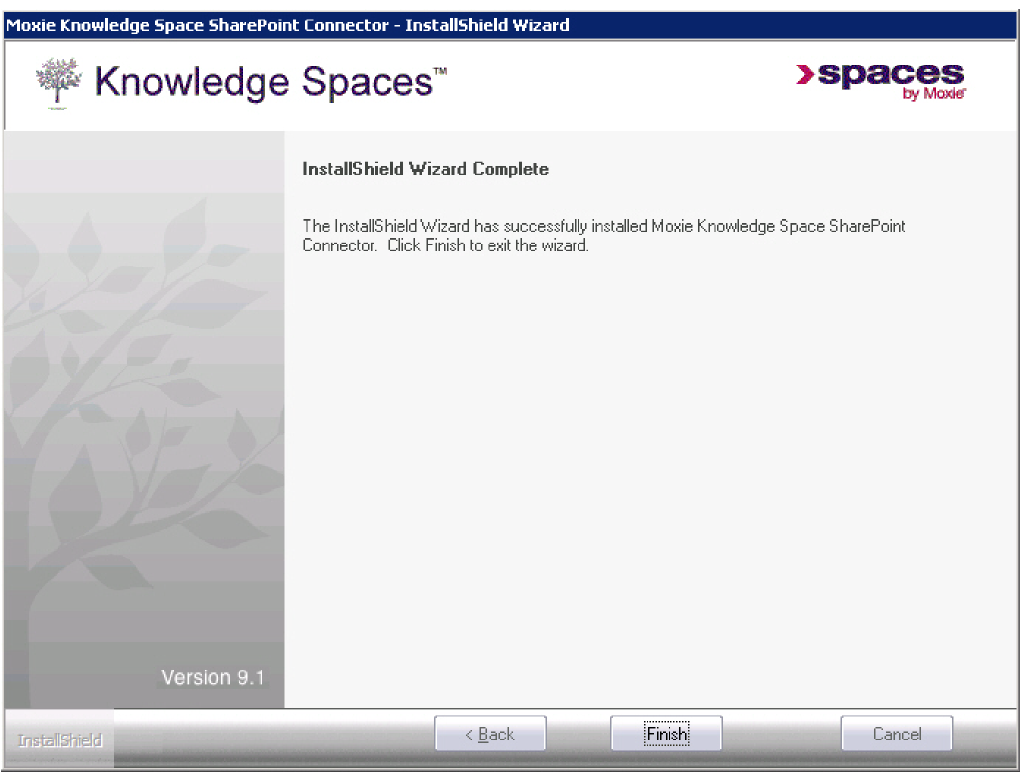
8. Click **Next** to continue. The following screen is displayed.



9. Do the following:
   - **SP User Name** – Type the user name with administrator privileges to the Sharepoint server.
   - **SP Password** – Type the password for Sharepoint user.
   - **Sharepoint IP** – Type the IP address of the Sharepoint server.
   - **Port** – Type the port number of the Sharepoint server.
10. Click **Next** to continue. The following screen is displayed.



11. Click **Install** to start the installation. The **InstallShield Wizard Complete** screen is displayed.



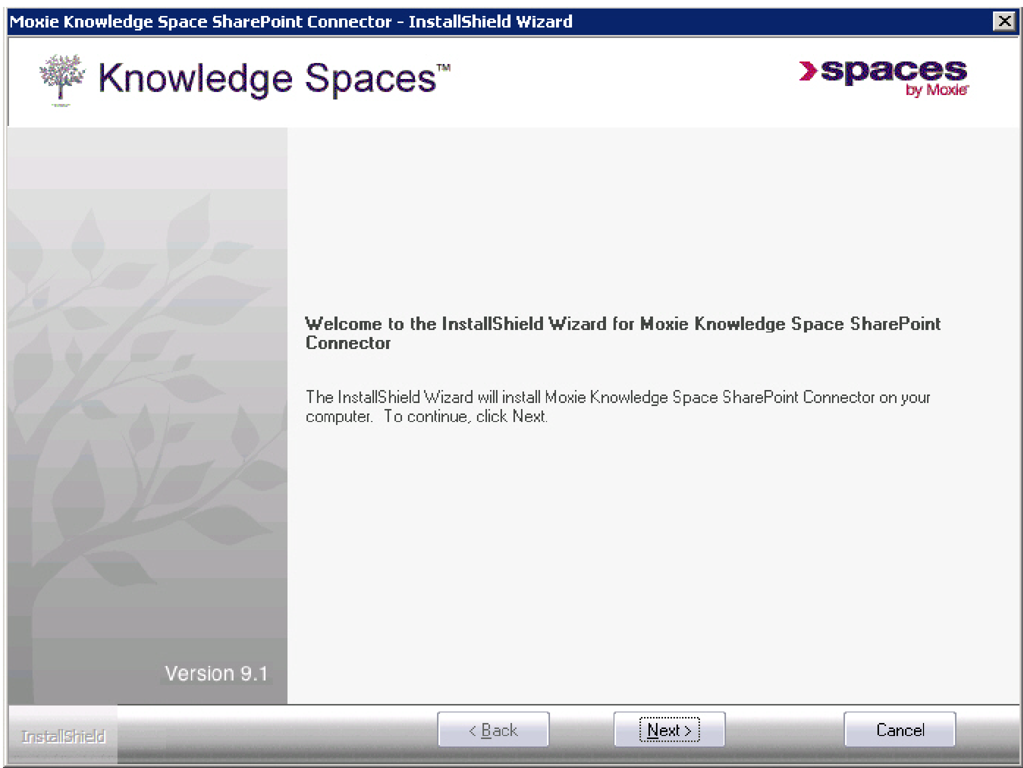
12. Click **Finish** to exit the installation wizard.

Notes

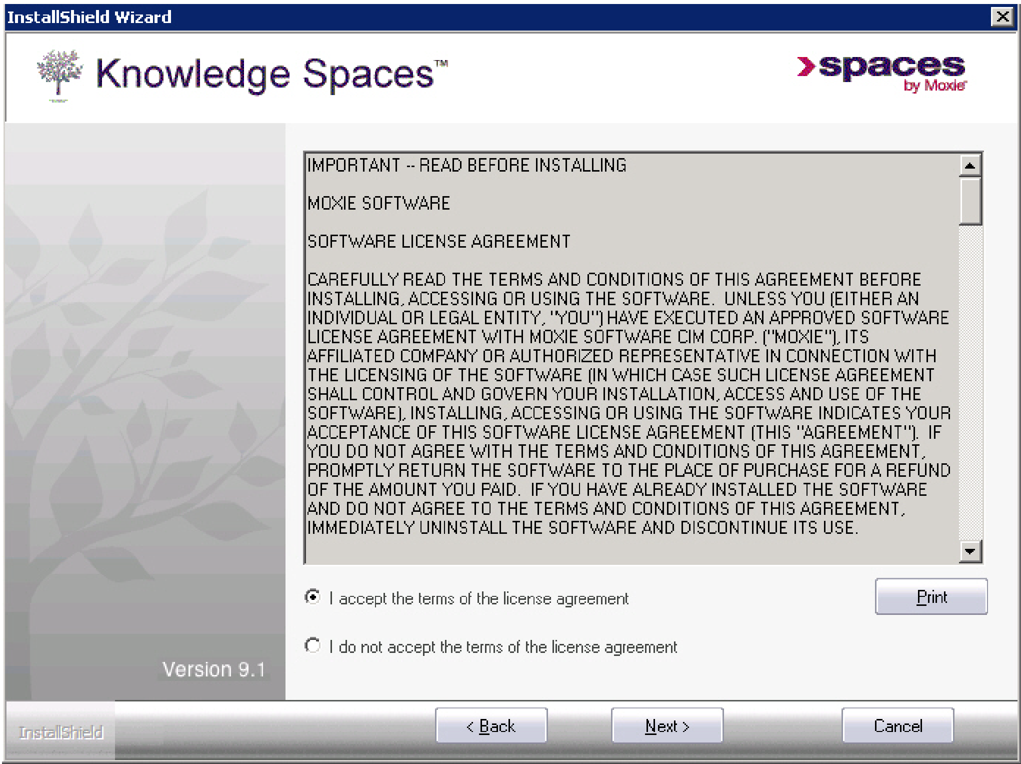
- When the installation is successful the Sharepoint service is started. To verify, click **Start** > **Administrative Tools** > **Services** > **Sharepoint2010ConnectorCFS**
- To verify if Sharepoint schedule task is running, click **Start** > **Administrative Tools** > **Task Scheduler** > **KBSharePointConfigUpdate.**

Installing SharePoint Connector on SharePoint Server

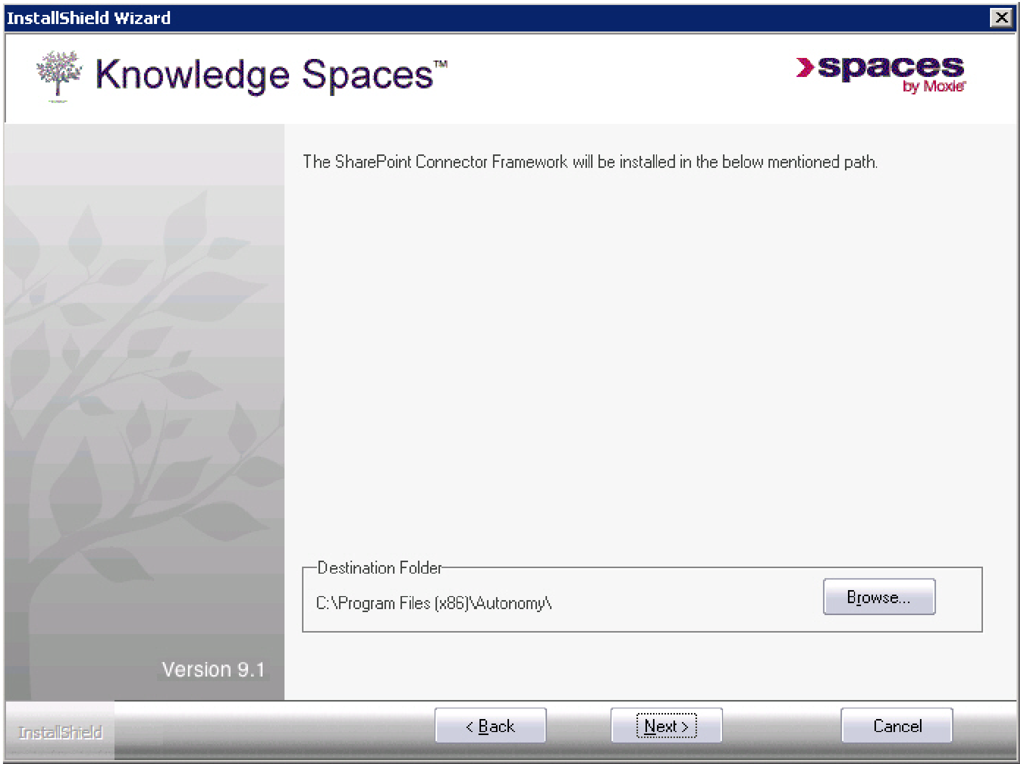
1. Download the **SharepointCFS - Knowledge Spaces 9.4.zip** file to a folder on the local drive, and unblock the zip file.
2. Extract the files in the **SharepointCFS - Knowledge Spaces 9.4.zip** file to any location on the local drive. Double-click **setup.exe**. The Welcome screen is displayed.



3. Click **Next**. The License Agreement screen is displayed.

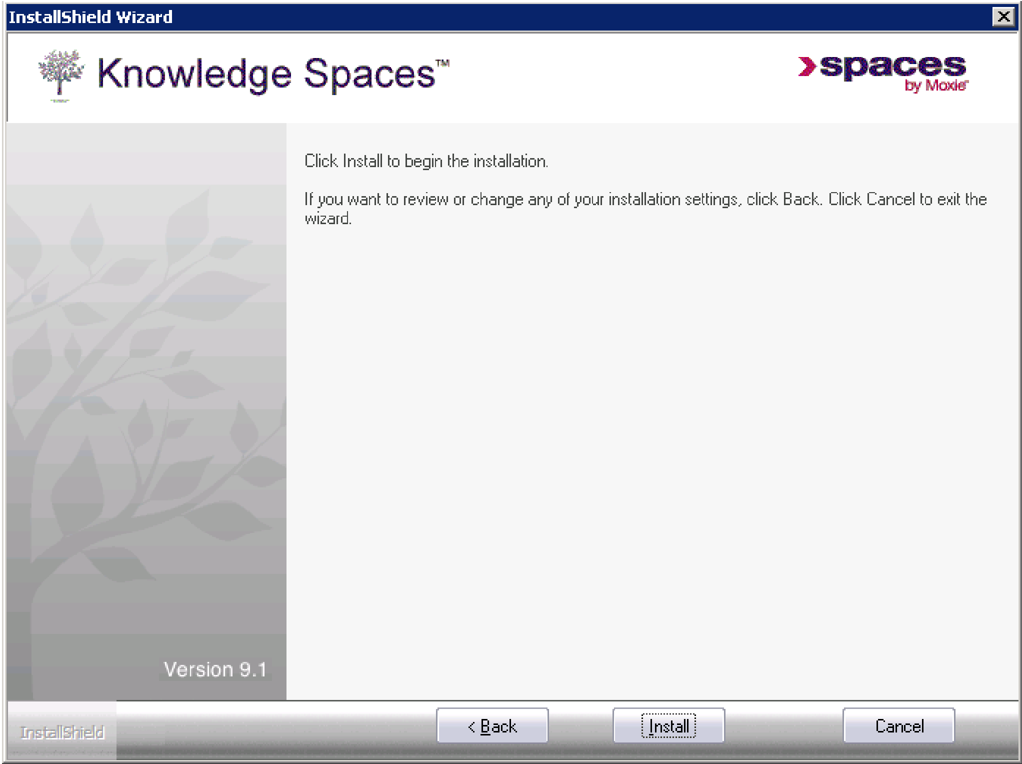


4. Read the license agreement, and click **I accept the terms of the license agreement**.
5. Click **Next** to accept the license agreement. The following screen is displayed.

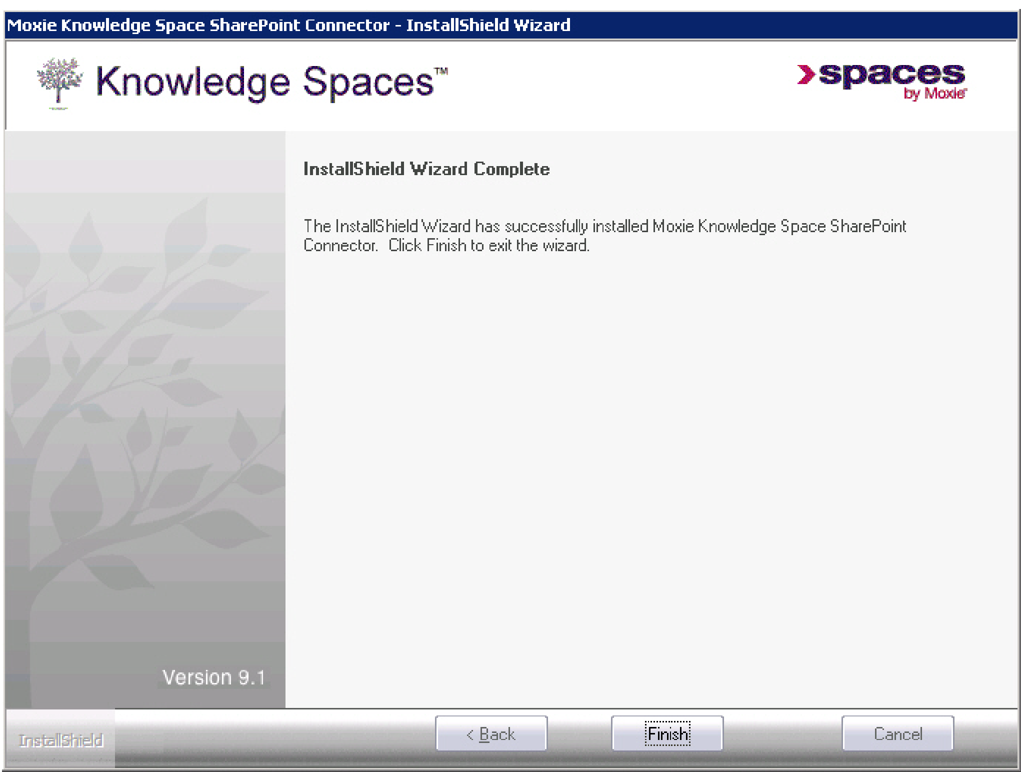


> **Note**
>
> The default installation folder is **C:\Program Files (x86)\Autonomy**

6. Optional Step: To change the default installation folder, click **Browse** and choose the preferred installation folder.
7. Click **Next** to continue. The following screen is displayed.



8. Click **Install** to start the installation. The **InstallShield Wizard Complete** screen is displayed.



9. Click **Finish** to exit the installation wizard.

Note

- When the installation is successful, the **Autonomy** folder is created in the IIS Manager automatically. To verify, click **Start** > **Administrative Tools** > **Internet Information Services Manager (IIS) Manger> Sites > _vti_bin > Autonomy**.

Chapter 7:Search Engine Mapping

This chapter provides information about search engine mapping of a KB Portal to make it available for "crawling and indexing" by the Google Search Engine.

In this chapter

Search Engine Map Export

Knowledge Spaces™ Admin Control Panel can export an XML Sitemap file for the Google Search Engine. For a KB Portal to be available for crawling and indexing by the Google Search Engine, an XML Sitemap file with the list of all the Articles Published on the Portal must be created. The XML Sitemap file helps Google better find and understand the Articles on the Portal, and understand how frequently they are updated. You must further create a Google Webmaster Tools account and submit the Portal's XML Sitemap file in the Google Webmaster Tool.

To create an XML Map for a specific KB Portal, you must perform specific configurations in both Knowledge Spaces™ Admin Control Panel, and on the Google Webmasters Tool.

- For information about the configurations in Google WebMasters Tool, refer Google WebMaster Tools Help at http://www.google.com/support/webmasters/bin/answer.py?answer=70896&hl=en.

> **Note**
>
> - Only **No Registration** Portals with **No IP Address Restriction** can be configured to be available on Google Search Engine.
> - Search Engine Mapping feature is available only for Portals designed using **Portal Style #4**.

Configuring a Portal for Search Engine Mapping

To configure a Portal to be available to the Google Search Engine, you must create a Search Engine Map for the Portal in Knowledge Spaces™ Admin Control Panel. When you create a Search Engine Map for a Portal, the Portal is placed in a queue for the generation of XML Site Map file, which must be submitted on Google Webmasters tool.

Creating a Search Engine Map for a Portal

You can create a Search Engine Map for a **No Registration** and **No IP Address restriction** enabled Portal.

To create a Search Engine Map for a Portal, carry out the following steps.

1. On the Portal page, click **Search Engine Mapping**. The Create Search Engine Map page is displayed.

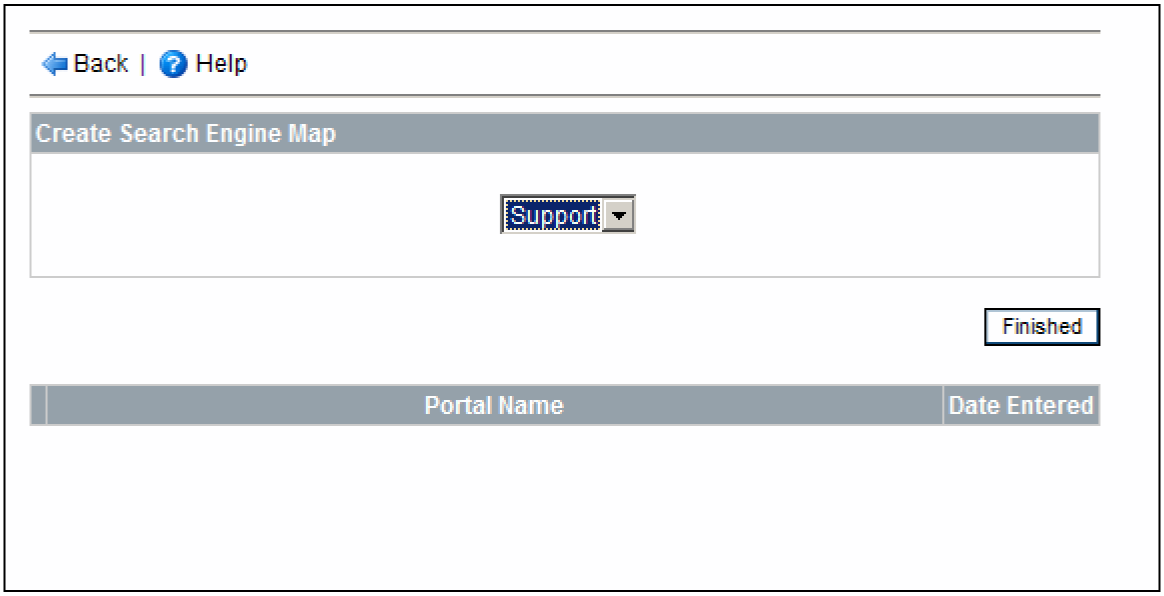


Figure 381 Create Search Engine Map

2. Click  and select the Portal for which you want to create a Search Engine Map.

> **Note**
>
> Only the **No Registration** Portals with **No IP Address restriction** enabled, and not yet configured for Search Engine Map are listed for selection.

3. Click **Finished**. The Portal is configured for Search Engine mapping, and is placed in the queue for generation of the selected Portal's XML Site Map file.

> **Note**
>
> - When the **KBSearchEngineMapping** scheduled task on the KB Portal server is run, the XML Site Map file for the Portal is generated in the **<System Drive>:\Program Files\Knowledgebase.Net\knowledgebase\applicationprogram\ui\http\KB Portal** path on the Portal server.
> - After a Portal is search engine mapped, and the XML Site Map file for the Portal is generated, any changes on the Portal will be updated in the XML Site Map for the Portal during the next run of the **KBSearchEngineMapping** scheduled task.
> - By default, the **KBSearchEngineMapping** scheduled task is configured to run at 3.00 AM daily.

Dowloading the XML Site Map File

When a Portal is configured for Search Engine Mapping, the Portal is placed in a queue to generate the XML Site Map file with friendly URLs of the **Published** Articles on the Portal. When the **KBSearchEngineMapping** scheduled task for Search Engine Mapping runs, the XML Site Map file for the Portal is generated and is available for download or view from Knowledge Spaces™ Admin Control Panel.

To download an XML Site Map file generated for a Portal, carry out the following steps:

1. On the Portal page, click **Search Engine Mapping**. The Create Search Engine Map page is displayed.

   The Portals configured for Search Engine Mapping are listed on the page.

2. Click the  button next to the name of the Portal whose XML Site Map file you want to download. The File Download window is displayed.

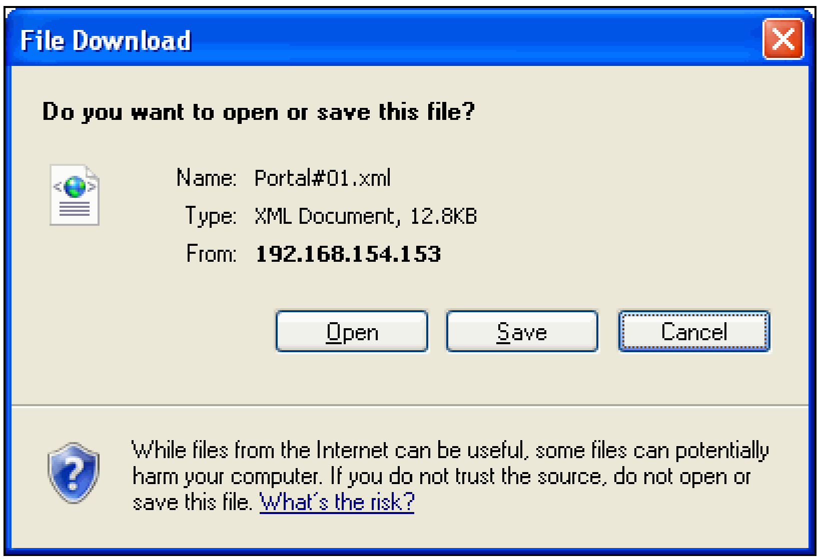


Figure 382 File Download Window

3. Click **Open** to view the XML Site Map file in a web browser.

   - Or -

   Click **Save** to save the XML Site Map file in a desired location on your computer.

   The following figure shows sample XML Site Map file generated for a KB Portal:

```
  <?xml version="1.0" encoding="UTF-8" ?>
- <urlset xmlns="http://www.google.com/schemas/sitemap/0.84"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    schemaLocation="http://www.google.com/schemas/sitemap/0
    http://www.google.com/schemas/sitemap/0.84/sitemap.xsd
  - <url>
      <loc>http://sitemap.com/KB/article/2-1001.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1002.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1003.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1004.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1005.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1006.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1007.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1008.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1009.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  - <url>
      <loc>http://sitemap.com/KB/article/2-1010.html</loc>
      <priority>0.5</priority>
      <changefreq>Daily</changefreq>
    </url>
  </urlset>
```

Figure 383 Sample XML Site Map File

.

Note

- The XML Site Map file helps Goggle better understand the pages available on the Portal.
- In the XML Site Map file, a **<url>** node is created for each Article published on the Portal. Each **<url>** node has three sub nodes, **<loc>**, **<priority>**, and **<changefreq>**. The **<loc>** node displays the location of the Article on the Portal. The **<priority>** node displays the priority set for the Article to be displayed on the Google Search Engine. The **<changefreq>** node displays the change frequency set for the Article. It lets Google know on how often the content of the Article is updated.
- An XML Site Map file can have a maximum of **50,000** Article URLs. For every **50,000** published Articles on the Search Engine mapped Portal, separate XML Site Map files will be created to be submitted in Google Webmasters Tool.
- If the Domain name is configured for the Portal you want to Search Engine Map, the Article URLs in the XML Sitemap file for the Portal will be generated with the Portal Domain name instead of the IP Address of the Portal. For information about configuring the Domain name for a Portal, see **"Configuring a Portal Domain Name" on page 508**.
- Google indexes an Article URL only once. If you create Search Engine Mapping for two Portals that are associated with a common Knowledge Base, only the SiteMap file created for the first Portal will include the URLs of the Published Articles in that Knowledge Spaces.
- The Articles created online in Knowledge Spaces™ Admin Control Panel are associated with the **Title** and **Description** Meta tags by default. If you want to associate additional Meta tags for the Articles you want to Search Engine Map, you must create an Article Template with Template Body for each Meta tags required and create the Articles using the new Article Template.

Removing the Search Engine Map Configuration for a Portal

You can remove a search engine mapped Portal from being visible on the Google Search Engine by manually deleting the Portal listed on the Create Search Engine Map page in Knowledge Spaces™ Admin Control Panel. When you delete the search engine mapped Portal from the Create Search Engine Map page, the XML Site Map file specific to the Portal is removed from the Portal Server when the **KBSearchEngineMapping** scheduled task is next run on the Portal server.

> **Note**
>
> - Ensure that you also manually delete the KB Portal from Google WebMasters Tool to prevent Google Search Engine from listing the Article URLs of the Portal already cached in Google Index server.
> - Removal of the Search Engine Map configuration for a Portal does not remove the associated Portal.

To remove the Search Engine Map configuration for a Portal, carry out the following steps:

1. On the Portal page, click **Search Engine Mapping**. The Create Search Engine Map page is displayed.

   The Portals configured for Search Engine Map are listed on the page.

2. Click  next to the name of the Portal for which you want to remove the Search Engine Map configuration. You are prompted with the following message:

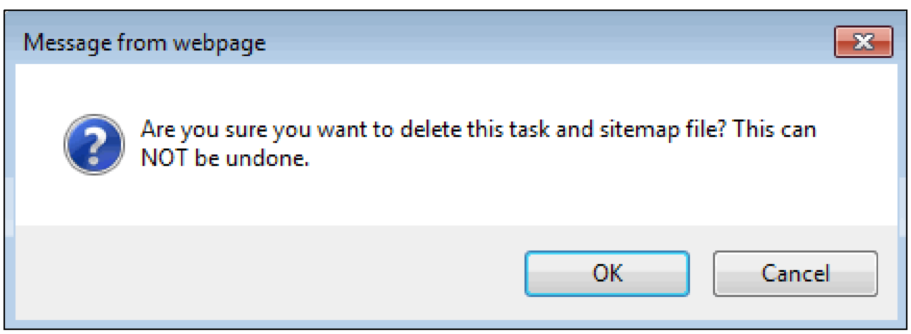


Figure 384 Removing the Search Engine Map Configuration for a Portal

3. Click **OK**. The KB Portal is placed in the queue and the configuration is removed when the Search Engine Mapping schedule task is next run.

   - Or -

Click **Cancel** to cancel the removal operation.

> **Note**
>
> When you try to change the registration type of a Search Engine mapped Portal to a **Registration required**, **Secure Portal**, or **Personalized Portal**, a warning message is displayed indicating that the operation will invalidate the existing Search Engine Mapping settings for the Portal.

Configuring a Portal Domain Name

For the Article URLs in a Portal SiteMap file to be generated with the Portal Domain name instead of the Portal IP Address, you must configure the Domain name of the Portal in the **ConfigPortal.xml** file located in the following path on the server where the KB Portal is installed.

```
<Moxie Software(TM) KBInstallation
Path>\KnowledgeBase.Net\knowledgebase\applicationprogram\ini\system
```

To configure the Domain name for a Portal, carry out the following steps:

1. Open the **ConfigPortal.xml** file using a text editor.
2. Navigate to the following section of XML code:

```
<SiteMap>
<SiteUrl>http://sitemap.com</SiteUrl>
<SiteMap>
```

3. In the **<SiteUrl></SiteUrl>** tag, specify the domain name and the port number of the server computer on which the KB Portal is installed.
4. **Save** and close the file.

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