

# Knowledge Tools

## Administrator Guide

r11.2



This documentation and any related computer software help programs (hereinafter referred to as the "Documentation") is for the end user's informational purposes only and is subject to change or withdrawal by CA at any time.

This Documentation may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of CA. This Documentation is confidential and proprietary information of CA and protected by the copyright laws of the United States and international treaties.

Notwithstanding the foregoing, licensed users may print a reasonable number of copies of the documentation for their own internal use, and may make one copy of the related software as reasonably required for back-up and disaster recovery purposes, provided that all CA copyright notices and legends are affixed to each reproduced copy. Only authorized employees, consultants, or agents of the user who are bound by the provisions of the license for the product are permitted to have access to such copies.

The right to print copies of the documentation and to make a copy of the related software is limited to the period during which the applicable license for the Product remains in full force and effect. Should the license terminate for any reason, it shall be the user's responsibility to certify in writing to CA that all copies and partial copies of the Documentation have been returned to CA or destroyed.

EXCEPT AS OTHERWISE STATED IN THE APPLICABLE LICENSE AGREEMENT, TO THE EXTENT PERMITTED BY APPLICABLE LAW, CA PROVIDES THIS DOCUMENTATION "AS IS" WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NONINFRINGEMENT. IN NO EVENT WILL CA BE LIABLE TO THE END USER OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF CA IS EXPRESSLY ADVISED OF SUCH LOSS OR DAMAGE.

The use of any product referenced in the Documentation is governed by the end user's applicable license agreement.

The manufacturer of this Documentation is CA.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

Copyright © 2006 CA. All rights reserved.

## CA Product References

This document references the following CA products:

- Advantage™
- Allfusion®
- BrightStor®
- CleverPath™ Portal
- eTrust® Embedded Identity and Access Management (eTrust eIAM)
- Unicenter® Asset Management
- Unicenter® Asset Portfolio Management (APM)
- Unicenter® Management Portal
- Unicenter® Network and Systems Management (NSM)
- Unicenter® Remote Control
- Unicenter® Service Desk
- Unicenter® Knowledge Tools (KT)
- Unicenter® Software Delivery
- Unicenter® TNG for Windows

## Contact Technical Support

For online technical assistance and a complete list of locations, primary service hours, and telephone numbers, contact Technical Support at <http://ca.com/support>.



# Contents

---

<b>Chapter 1: Introduction</b>	<b>11</b>
Knowledge Tools Modules .....	11
Knowledge Tools Roles .....	12
Audience .....	13
What You Need to Know .....	14
Getting Help .....	14
<b>Chapter 2: Managing Your Knowledge Base</b>	<b>15</b>
Accessing Knowledge Categories .....	15
Working With Categories .....	16
Creating Categories .....	17
Editing Categories .....	18
Deleting Categories .....	19
Finding Documents .....	19
Filter Documents .....	20
Work with the Document List .....	20
<b>Chapter 3: Working with Documents</b>	<b>21</b>
Creating Knowledge Documents .....	21
Adding Attributes .....	22
Color Palette .....	23
Managing Comments .....	23
Managing Categories .....	23
Viewing History .....	23
Forwarding and Publishing a Document .....	24
Managing Attachments .....	24
Creating Knowledge Tree Documents .....	25
Modifying Documents .....	26
Windows .....	26
Images Library .....	26
Previewing Documents .....	44
<b>Chapter 4: HTML Editor</b>	<b>45</b>
Menus .....	47
Edit menu .....	48

---

Format menu .....	48
Insert menu .....	49
Table menu .....	50
HTML Editor shortcut menu .....	51

## **Chapter 5: Document Tree Builder** **53**

Windows .....	53
Menus .....	54
Tree menu .....	54
Node Actions menu .....	55
Edit menu .....	56
Options menu .....	56
View menu .....	57
Window menu .....	58
Help menu .....	58
Logout menu .....	59
Tree pane shortcut menu .....	59
DT Builder window .....	61
Procedures .....	70
Access the DT Builder for a New Knowledge Tree Document .....	70
Access the DT Builder for an Existing Knowledge Tree Document .....	70
Add a Conclusion Node .....	71
Add a Jump Node .....	72
Add a Query Node .....	73
Add the Tree Description .....	74
Add the Displayed Text for a Node .....	74
Add the Response Text for a Node .....	75
Check a Knowledge Tree for Errors .....	76
Copy and Paste a Node and Its Subnodes .....	76
Copy and Paste a Single Node .....	77
Cut and Paste a Node and Its Subnodes .....	77
Create a Knowledge Tree Document .....	78
Delete a Node and Its Subnodes .....	80
Exit the DT Builder .....	80
Link a Jump Node .....	80
Paste a Node and Its Subnodes .....	81
Preview the Node Design .....	81
Rename a Node .....	82
Save a Knowledge Tree .....	82
Set DT Builder Options .....	83

---

## Chapter 6: Administration Tab 85

Approval Process Manager .....	85
Approval Process Settings Pane .....	85
Approval Process Template List Pane .....	87
Status List Pane .....	100
Documents .....	103
Document Settings Pane .....	104
Document Template List Pane .....	105
Knowledge Administration .....	112
Noise Words List Pane .....	112
Special Terms List Pane .....	116
Synonyms List Pane .....	120
Knowledge Categories Pane .....	124
System Administration .....	176
FAQ Options pane .....	177
General Settings pane .....	179
Parse Settings pane .....	180
Report Card pane .....	183
Search Options pane .....	185
Service Desk Integration .....	187
Field Mapping pane .....	187
Issue Search Configuration pane .....	190
Request Search Configuration pane .....	191

## Chapter 7: Knowledge Tab 193

Windows .....	194
Add File window .....	194
Category Selection window .....	195
Create New Comment window .....	196
Create New/Update/Detail Document Windows .....	196
Date Helper window .....	201
Email Document window .....	202
Event for Document View window .....	204
Forward Document window .....	204
Knowledge Document List pane .....	206
Knowledge Document Detail window .....	207
Knowledge Tree Document window .....	209
Preferences Window .....	210
Preferences Detail window .....	215
Preview Window (User View) .....	218
Knowledge Document Window .....	218

---

Reject Document window .....	220
Unpublish Document window .....	224
Unretire Document window .....	225
Update Comment window .....	227
View Comment window .....	230
Windows window .....	231
Menus .....	231
File menu .....	232
View menu .....	232
Reports menu .....	233
Window menu .....	234
Help menu .....	234
Default Shortcut Menu .....	235
Knowledge Document List shortcut menu .....	236
Procedures .....	237
Work with Bookmarks .....	237
Work with Documents .....	239
Work with the Knowledge Tab .....	260

## **Chapter 8: Keyword Search Tab 269**

Windows .....	270
Add File window .....	270
Create New Comment window .....	271
Create New/Update/Detail Document Windows .....	271
Date Helper window .....	276
Event for Document View window .....	278
Knowledge Document Window .....	278
Forward Document window .....	281
Knowledge Document Detail window .....	282
Email Document window .....	284
Knowledge Document List pane .....	285
Knowledge Search pane .....	286
Knowledge Tree Document window .....	291
Preferences Window .....	293
Preferences Detail window .....	298
Preview Window (User View) .....	300
Reject Document window .....	301
Unpublish Document window .....	304
Unretire Document window .....	306
Update Comment window .....	307
Update Notification window .....	311
View Comment window .....	312

---

View Notification window .....	313
Windows window .....	313
Menus .....	314
File menu .....	314
View menu .....	315
Window menu .....	316
Help menu .....	316
Procedures .....	317
Add a Category Link to a Document .....	317
Add a Comment to a Document You are Editing .....	318
Add a Comment to a Document You are Viewing .....	318
Add a Contact to the Notification List .....	319
Add a Document Link to a Document .....	320
Add a URL Link to a Document .....	320
Attach a File to a Document .....	321
Check Spelling in a Document .....	321
Complete the Solution Survey for a Document .....	322
Create a Knowledge Document .....	323
Create a Knowledge Tree Document .....	324
Delete a Comment from a Document .....	325
Delete a Contact from the Notification List .....	325
Delete a File Attachment from a Document .....	325
Edit a Comment in a Document .....	326
Edit a Contact in the Notification List .....	326
Edit a Document from the Keyword Search Tab .....	327
Filter the Knowledge Document List .....	328
Forward a Document .....	329
Open a Document from the Keyword Search Tab .....	329
Open an Item from the Unicenter Service Desk Banner .....	330
Preview a Document .....	331
Print a Document .....	332
Publish a Document .....	332
Remove a Category Link from a Document .....	333
Remove a Document Link from a Document .....	333
Remove a URL Link from a Document .....	333
Retire a Document .....	334
Send a Document in Email .....	334
Set the Primary Category for a Document .....	335
Unpublish a Document .....	335
Unretire a Document .....	336
View a Document from the Knowledge Tab or the Keyword Search Tab .....	337
View Document History .....	338



# Chapter 1: Introduction

---

Knowledge Tools is part of the Unicenter® Service Desk suite of products from CA that offers a complete customer relationship management solution. Unicenter Service Desk Knowledge Tools (Knowledge Tools) is a powerful knowledge management solution that offers multiple knowledge models, tailoring the right solution to the customer effectively and efficiently. It enables rapid searches of a dynamic knowledge base to quickly resolve customer issues.

## Knowledge Tools Modules

Knowledge Tools comprises the following modules:

### **Knowledge**

The Knowledge tool consists of the following components:

- Natural Language Search (NLS) permits the use of natural language, such as "How do I install a network printer?" to query the knowledge base for relevant solutions. It instantly pinpoints candidate solutions, ranking them in order of relevance. Since NLS learns from every solution captured, it continuously and automatically refines the knowledge base.
- Keyword Search lets you perform a search on words contained in the Title, Summary, Problem, and Resolution fields of knowledge documents.

**Note:** Keyword Search is included as part of the Unicenter Service Desk product. To access the full functionality of Knowledge Tools, which focuses on managing the entire knowledge lifecycle, you must have a Knowledge Tools license.

### **Knowledge Tree Designer**

The Knowledge Tree Designer tool employs rule-based modeling functionality that helps the analyst develop and deploy business policies and intelligence by mapping any reasoning process into a knowledge tree structure. The knowledge tree is perfectly suited to guiding users through a logical process such as changing a toner cartridge in a printer or changing a hard drive in a server.

### **Knowledge Categories**

The Knowledge Categories allow analysts and knowledge engineers to manage the content for all of the problem-solving models in the knowledge base. They provide a mechanism for building and editing knowledge underlying the retrieval tools. Because they include the ability to assign ownership of a particular knowledge solution to an expert, they ensure that the solution for a given problem is kept current and accurate.

### **HTML Editor**

Use the HTML Editor to define the layout and static content of a knowledge document template, to define the layout and content of the Resolution section of a knowledge document, or to define the layout and content of a node in a knowledge tree document.

### **Knowledge Report Card**

The Knowledge Report Card provides feedback to analysts, knowledge engineers, knowledge managers, supervisors, category owners, and system administrators about which knowledge documents are most effective. The information provided can be used in a variety of ways to improve the processes of creating knowledge documents and providing the best support to customers.

## **Knowledge Tools Roles**

Knowledge Tools is designed for a wide variety of users, from system administrators and knowledge managers, who maintain the product to customers, who use the system to find solutions to their problems. Although one person can fill multiple roles, there are six basic user roles in Knowledge Tools:

### **Guest**

Guests use an interface that allows access to the Advance Search, Submit Knowledge, and Logout links in the main window, and to published knowledge documents and knowledge tree documents that have been assigned "Grant Public Read Permission."

**Customer/Employee**

Customers/Employees have the same permissions as guests. They can also use the Bookmarks tab ("My Bookmarks") and access other documents in the knowledge base for which they have permissions.

**Analyst**

Analysts have the same permissions as customers, plus access to Preferences, as well as access to the Knowledge Categories link in the Search Tools window. In Knowledge Categories, analysts can manage documents in the knowledge base for which they have permissions.

**Knowledge Engineer**

Knowledge Engineers have the same permissions as analysts, but can also manage categories in the knowledge base for which they have permissions.

**Knowledge Manager**

Knowledge Managers have the same permissions as knowledge engineers, but can also perform mass deletes of categories or documents and run reports. The Knowledge Manager has limited access to the Administration tab, where he can access Knowledge Categories and manage search terms.

**Administrator**

Administrators have access to all product features, including the full functionality of Knowledge Categories. The Administration tab is available exclusively to system administrators, and includes knowledge management features such as managing the approval process, document settings, search and survey settings, knowledge report card settings, and more.

## Audience

This guide is intended for the person having overall responsibility for the administration of the Knowledge Tools installation (system administrator). It is also intended for analysts, knowledge engineers, and knowledge managers, who are responsible for managing the documents in the knowledge base. Responsibilities for each type of user are described in Knowledge Tools Roles.

## What You Need to Know

To benefit fully from this guide, you need a working knowledge of the operating system and the Windows environment on your installation. You must also be familiar with the operation of your web server and be able to perform basic administrative tasks.

## Getting Help

Knowledge Tools provides online help that you can access via the Help menu of any component. It provides help on the various windows you encounter, in addition to step-by-step procedures to help you perform many tasks.

For further technical assistance with this product, refer to Contact Technical Support (see page iii) for information on contacting CA Technical Support.

# Chapter 2: Managing Your Knowledge Base

---

Managing the knowledge base is the primary task for Knowledge Tools analysts and knowledge engineers. Depending upon the structure of your organization, one analyst might perform the knowledge engineer and administrator functions. The analyst responsible for the knowledge base uses the following tools:

## **Knowledge Categories**

Knowledge Categories manage the content of the knowledge base, including the category structure, knowledge documents and knowledge tree documents.

## **Migration Tool**

The Migration Tool upgrades a previous version of a Unicenter Service Desk Knowledge Tools database to the current version (for example, from version 6.0 to 6.5).

This chapter gives an overview of the knowledge base tasks that you can perform using the Knowledge Categories component of Knowledge Tools.

## Accessing Knowledge Categories

### **To access Knowledge Categories:**

1. Log in to Knowledge Tools as an analyst, knowledge engineer, knowledge manager, or administrator.
2. From the Knowledge tab, choose View, Knowledge Categories.

OR

From the Admin tree, choose Knowledge, Knowledge Categories.

## Working With Categories

Knowledge Engineers typically manage categories; however, knowledge managers and administrators can also perform this function.

The left pane of the Knowledge Categories window lists categories and folders that organize the knowledge documents and knowledge tree documents in the knowledge base. Each document resides in a primary category and may also be linked to other related categories.

You can perform several category functions when creating or managing a document in the Document Editor. The Categories tab specifies the primary category for the document, links to other categories that are related, and links to other related documents. When you build the category structure, you are creating the hierarchical structure with which Knowledge Tools users will navigate to relevant documents. The primary category is usually the category in which the document was created, but any category can be specified as the primary category. The primary category is the category from which the document inherits its permissions. By working with categories on the Categories tab, you can control the categories in which a document appears, and which category it inherits permissions from (if applicable).

When you select a category in left pane, a list of documents in that category displays in the right pane (the Document List pane):

The screenshot shows the Unicenter Service Desk interface. At the top, it says "Unicenter® Service Desk" and "Logged in as: qauser (Log Out)". Below this is a "Knowledge Categories" header with a menu bar (File, View, Window, Help) and a search bar. The left pane shows a tree view of categories: Top, Credit Cards, Consumer Lending, ATM, Investing, Online Banking, and Personal Accounts. The right pane, titled "Knowledge Document List", shows a list of three documents. Each document entry includes a title, a summary, a document ID, the owner (qauser), and the status (Published). The documents are: "Lost or Stolen Card" (ID: 400002), "Debit or ATM Card Features" (ID: 400003), and "Getting a new PIN (Personal Identification Number)" (ID: 400004). The list is paginated to show 1-3 of 3 items.

Document Title	Document ID	Owner	Status
<a href="#">Lost or Stolen Card</a>	400002	qauser	Published
<a href="#">Debit or ATM Card Features</a>	400003	qauser	Published
<a href="#">Getting a new PIN (Personal Identification Number)</a>	400004	qauser	Published

You can create documents in the selected category using the Categories menu as discussed in Creating Knowledge Documents and Creating Knowledge Tree Documents.

**Note:** In the Search Tools window, the right pane displays a list of documents in the selected category and in all the child categories of the selected category. In Knowledge Categories, the Document List only displays documents located in the selected category.

You can perform the following tasks in Knowledge Categories:

- Find categories and documents with the Advanced Search/Filter
- Create a knowledge document within a category
- Create a knowledge tree document within a category
- Add or modify a category, and delete one or more categories
- Cut, copy, or paste a category
- Refresh the Document List
- Edit document properties in the document list
- Use preferences to select document attributes that appear in the document list

You can perform these tasks using the commands on the File and View menus, or the shortcut menu that displays when you right-click a category.

## Creating Categories

### To create a new category:

1. Choose File, New Category.

OR

Right-click on the Categories pane and select New Category from the popup menu.

The Create New Category screen displays.

2. Enter the Title and Description for the new category.
3. Use the Keywords text box to specify keywords (separated by commas) for the category. When a user performs a category search, these keywords are used to match the relevant categories.
4. Click Save.

The new category is created.

## Selecting Permissions for the Category

You can define specific permissions for the new category or choose for it to inherit permissions from its parent category. The default option (Inherit Permissions from Parent Category) sets the new category with the same permission levels as its parent. If you choose the Specify Category Permissions option, you can determine the groups that have read, read/write, or no access to that category.

**Note:** Occasionally, a user may have permissions for a document, but not for the category in which it resides. When the document is opened from Knowledge Categories, the Categories and Permissions tabs are disabled. Also, because the user would have no permissions for the document, it would not be found using a filtered search or within the category tree.

## Editing Categories

**To edit a category:**

1. Highlight the category you want to edit.
2. Choose File, Edit Category.

OR

Right-click on the Categories pane and select Edit Category from the popup menu.

The Update Category screen displays.

The screenshot shows a web application window titled "Credit Cards' Update Category". At the top right, there are three buttons: "Save", "Cancel", and "Reset". Below the title bar is a pane labeled "Content" with a tree view showing "1. Content" selected. The main content area contains a form with the following fields:

- Title:** A text input field containing "Credit Cards".
- Description:** A large text area.
- Keywords:** A text input field.
- Category Owner:** A field with a user selection icon and a text input box.

3. Make the desired edits and click Save.

The category changes are stored.

## Deleting Categories

Only knowledge managers and system administrators have access to the Delete category function.

### To delete a category:

1. Highlight the category you want to delete.
2. Choose File, Delete Category.

The Delete Category dialog displays.



Upon deletion of this category, all subcategories and documents will move up to the first available parent category.

3. Choose Include Subcategories to delete all subcategories of the selected category.
4. Choose Include Documents to delete all documents contained in the selected category.
5. Click OK.  
A confirmation dialog displays.
6. Click OK to delete the category or click Cancel to abort the deletion.

## Finding Documents

An important feature of Knowledge Categories is its ability to allow you to search the knowledge base for the documents that would be of interest to you.

## Filter Documents

Another very useful tool is the Filter pane of the Knowledge Categories window. By entering your own search criteria in the fields of the Filter pane, you can limit the number of documents that appear in the Document List to only those that you want to see, and then sort them, if you desire.

### To filter documents:

1. Enter the desired search criteria in the fields of the Filter pane and click Search.

The Document List populates with the relevant documents.

2. To open a document, click on the document heading hyperlink or right-click on the document and choose View.

## Work with the Document List

The right pane of the Knowledge Categories window, called the Knowledge Document List pane, lists the documents for the category or folder selected in the Category pane. You can modify the information you see in this pane and use this pane to work with knowledge documents.

You can perform the following tasks when working with existing documents in the Document List pane:

- View lists of documents, each represented by a document heading and selected document properties
- View filtered documents
- Scroll through the documents easily with navigation controls
- Refresh the document list
- Open a document
- Delete a selected document
- Edit document attributes in the document list

For more information about how to perform these tasks, see [Working with Documents](#).

# Chapter 3: Working with Documents

Using Knowledge Categories functionality, you can create documents that are accessed by your clients.

## Creating Knowledge Documents

The screenshot shows the 'Unicenter® Service Desk' interface. At the top, it displays 'Logged in as: jgaiser (Log Out)' and a 'Request' dropdown menu. Below this is a menu bar with 'File', 'Window', and 'Help'. The main heading is 'Create New Document', with 'Save', 'Cancel', and 'Reset' buttons to its right. Below the heading, it shows 'ID:' and 'Current Task: Create Document'. On the right side, it indicates 'Indexing Status: Pending' and 'Current Status: Draft'. The main content area is titled '1. Content' and contains a 'Content' tab. A 'Spell Check All Fields' button is located at the top of the content area. Below this, there is a checkbox for 'Assign to Category Owner'. The form includes several text input fields: 'Title', 'Summary', 'Problem', and 'Resolution'. At the bottom, there is a 'Notes' section with a vertical scrollbar.

Analysts and administrators can create knowledge documents based on knowledge that has been submitted by outside users through the Submit Knowledge feature or by knowledge that they may have obtained from the service analysts who support the product.

Documents can be created from either the Knowledge tab, or from the Knowledge Categories screen. You create knowledge documents by navigating within the Category pane to the desired location and choosing New Knowledge Document from the File menu or from the pop-up menu that appears when you right-click on a category. When you do this, the Create New Document window appears, prompting you for all the information needed to create a new document.

On the Content tab, you enter the primary information for the document including the Title, Summary, Problem, Resolution, and optionally, Notes. After you are satisfied with the content of the entry, you can check for spelling errors by clicking the Spell Check button.

**Note:** The Resolution field can be edited using the HTML Editor (see page 45).

Misspelled words are highlighted and a list of suggested replacements is provided. You may choose to replace the word with one of the suggested words or ignore the suggestions and retain the original word. Users with the role of Knowledge Engineer or higher have access to the Add button, allowing them to add words to a site-specific lexicon (dictionary). This dictionary can contain commonly used words at the site so that spell checking does not treat these defined terms as spelling errors.

You can add words to the userdict.tlx lexicon, which is added to the <NX\_ROOT>/site/mods/lexicons directory after Service Desk has been configured. You can also add words to the lexicon in batch mode. This is useful if you need to add a large number of words. Any text editor can be used to create a file containing the words that are acceptable for this site. The file must have one alphanumeric word per line without any additional lines or text. To add the word list to the lexicon, run the pdm\_lexutil utility against the file. The utility updates the desired lexicons and the words are immediately available for spell checking. Usage information for the utility is available by typing pdm\_lexutil-h from the command prompt, as illustrated by the following:

```
c:\> pdm_lexutil -h
Utility to modify Service Desk lexicons
Usage: pdm_lexutil -a (to add words ) | -d (to delete words )
[ -f <file/lexicon containing list of words to be added/deleted> ]
[ -l <lexicon name> ] (defaults to userdict.tlx)
[ -h | ? ] (shows this usage information)
[ <wordlist> ] (word(s) to be added deleted)
```

Once you save the document by clicking Create, the remaining tabs become enabled so that you can define other aspects of the document. Also, the buttons in the window change to include the Publish button so you can publish the document immediately.

The sample document has been assigned an ID, is now in the “Create Knowledge Document” stage of the workflow and has a status of “Draft”. The next step is to add attributes and other information.

## Adding Attributes

On the Attributes tab, several fields are pre-filled. You can assign a new subject expert and/or owner to the document, along with the date the document is to become available in the knowledge base, and the date on which you want it to expire.

## Color Palette

The Color Palette opens when you do any of the following:

- Click the  Font Color button in the HTML Editor
- Click the  Background Color button in the HTML Editor
- Click the Background, FG Color, or Border button on the Table Properties dialog or the Cell Properties dialog

Use the Color Palette to select a color for the component whose attributes you are currently defining. To select a color, click it in the Color Palette. When you select a color, the Color Palette closes and the HTML Editor refreshes to reflect your selection.

## Managing Comments

On the Comments tab, you can add comments for the document. Customers and analysts can also enter comments in the Comment box that appears when a document is opened. The Comments tab also allows you to delete comments that are logged for the document.

## Managing Categories

Using the Categories tab, you can link or associate the document with multiple categories (in addition to the primary category) and/or other documents. This allows a document to be classified under many different applicable categories and can result in a more successful search. You can also specify the primary category.

## Viewing History

Use the History tab to view all events affecting the current document. For each event, the details of the event and the date and time at which the event occurred are listed. A filter is included on the History tab, which allows you to specify criteria for the type of events you want to display.

## Forwarding and Publishing a Document

When you finish adding information to a document, save it to the knowledge base, then publish or forward it to the next owner (depending on the next step defined in the workflow template for the document). Note that a system administrator can publish a document at any step in the workflow process. See the "Understanding Workflow" chapter for more information about the workflow process.

## Managing Attachments

Use the Attachments tab to manage file and URL attachments in the current document. In documents created using the default Built-In Knowledge Document or Built-In Knowledge Tree template, links to attachments display under the "Attachments" heading.

Note: Only the Attachment tab displays for published documents. For unpublished documents, the Attachment tab displays Repositories, Files, and Attachments panes.

This tab contains the following fields:

### Repositories

Displays a tree structure that contains the repositories and folders defined for the attachment library. Click **\_ \_** to expand a repository; click **\_** to open folders in the repository. To view the contents of a folder in the Files list, click the folder or folder name.

### Files

Displays a list of the files uploaded to the folder selected in the Repositories list.

### Attachments

Search for attachments using any of the fields provided. The Status field refers to the disposition of the attachment. The list displays the list of retrieved attachment files and URLs. To view the attached file or the destination of a URL, click it in the Attachments list. You can right-click an individual attachment to display a context menu that allows you to:

- **View Details** - Opens the View Attachments window. The field Attached To, at the bottom of this window, shows the documents this file/URL is attached to. This is provided as a link - to either the Documents Link List (KT), or to a record link, like a Request or Issue (SD).
- **Edit Details** - Opens the Edit Attachment window, allowing you to edit the Name and Description for the attachment, and view other specific details.

- **View Content** - Allows you to view the file contents.

This window can be displayed by Administrators from the Administration tab, by selecting Attachments Library, Attachments.

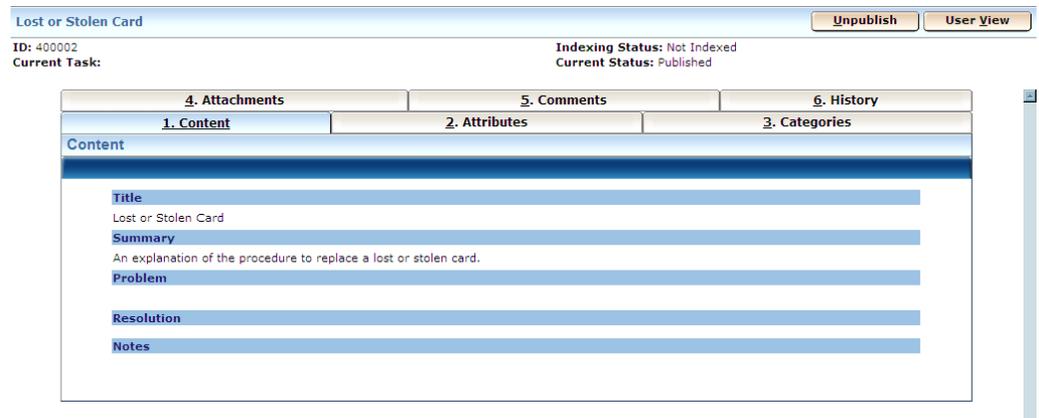
This tab contains the following button:

**Add URL Link**

Adds the URL defined in the Add URL Link box to the current document.

## Creating Knowledge Tree Documents

To create a knowledge tree document, navigate the Category Pane to the location where you want the knowledge tree document to reside, then choose Create Knowledge Tree Document from the Categories menu, or from the File menu on the Knowledge tab. The Knowledge Tree Document Editor window opens:



Complete the fields on the Knowledge Tree Document Editor Content tab, then save the changes to enable the Design Tree button. Click the Design Tree button to open the Knowledge Tree Designer window. This is the visual tool used to design your knowledge tree. See the “Creating Knowledge Trees” chapter for information about designing knowledge trees.

When you finish, save and forward or publish the knowledge tree document as described in the previous section.

## Modifying Documents

A knowledge document that has not yet been published is modified through the normal workflow process. By default, the creator of the document modifies the document using the Document Editor, until he publishes the document. In a custom workflow process, the owners for the tasks in the workflow or anyone with full (read/write) permissions can modify the document.

When a knowledge document or knowledge tree document is published, you are normally not permitted to modify the document. The document must be unpublished first, and then modifications can be made.

A published document can be modified if the administrative setting on the Workflow Settings page has been set, and if the user has the permissions to do so (if you are part of a group that has write access to the document). In this case, when opened from the Document List, the Document Editor window is invoked, permitting you to change the information on any tab. Click Save to save your changes.

## Windows

The HTML Editor includes a number of windows and dialogs to help you design the layout and static content of document templates and create documents. Windows and dialogs open when you click a button in the toolbar or on another window or dialog or when you select a command from a menu or shortcut menu.

## Images Library

The Images Library opens when you click From Library on the Insert Image window.

Use the Attachment Selection window to select a .bmp, .gif, .jpg, or .png file to insert in a document template.

This window contains the following fields:

### Repositories

Displays a tree structure that contains the repositories and folders defined for the attachment library. Click   to expand a repository; click  to open folders in the repository. To view the contents of a folder in the Files list, click the folder or folder name.

**Files**

Displays a list of the files uploaded to the folder selected in the Repositories list. When you select the file to insert, the Attachment Selection window closes and the file's URL displays in the Image URL box on the Insert Image window.

**Cell Properties dialog**

The Cell Properties dialog opens when you put the cursor in a table cell and select Cell Properties from the Table menu in the HTML Editor.

Use the Cell Properties dialog to define attributes that affect the layout and style of the current table cell.

This dialog contains the following fields:

**Width**

Defines the width of the selected cell. Enter a whole number in the box, then select a unit of measurement (for example, Pixels) from the list.

**Text Align**

Specifies the horizontal alignment of data and text in the selected table or cell. Select one of the following values:

**Left**

Aligns text and data to the left.

**Center**

Aligns text and data to the center.

**Right**

Aligns text and data to the right.

**Justify**

Aligns text to both the left and right.

**Default:** Left.

**Height**

Defines the height of the selected table or cell. Enter a whole number in the box, then select a unit of measurement (for example, Pixels) from the list.

**Vertical Align**

Specifies the vertical alignment of data and text in the table or cell. Select one of the following values:

**Top**

Aligns text and data to the top.

**Middle**

Aligns text and data to the center.

**Bottom**

Aligns text and data to the bottom.

**Baseline**

Aligns text so that the first line in each cell of a row rests on a baseline common to all cells in that row. The baseline is the imaginary line on which a line of text rests.

**Default:** Top.

**Background**

Opens the Color Palette so you can select a color to apply to the background of the selected table or cell. When you select a color, the button refreshes to display it. Click  to reset the control so that no color is selected.

**Default:** No color selected.

**Image URL**

Defines the location of an image to use as the background for the selected table or cell. You can use .bmp, .gif, .jpg, or .png images.

**Example:** \\c:\images\trees.png

**FG Color**

Opens the Color Palette so you can select a color to apply to items in the foreground of the selected table or cell (for example, text and data). When you select a color, the button refreshes to display it. Click  to reset the control so that no color is selected.

**Default:** No color selected.

**Border**

Opens the Color Palette so you can select a color to apply to the borders of the selected table or cell. When you select a color, the button refreshes to display it. Click  to reset the control so that no color is selected.

**Default:** No color selected.

**Border Style**

Specifies the style used to draw a border around the selected table or cell. Select one of the following options:

**None**

Renders the selection with no border.

**Dotted**

Renders the selection with a dotted border. Define a width (in pixels) for the border in the box provided.

**Example:** .....

#### **Dashed**

Renders the selection with a dashed border. Define a width (in pixels) for the border in the box provided.

**Example:** .....

#### **Solid**

Renders the selection with a solid border. Define a width (in pixels) for the border in the box provided.

**Example:** \_\_\_\_\_

#### **Double**

Renders the selection with a double solid border. Define a width (in pixels) for the border in the box provided.

**Example:** =====

#### **Groove**

Renders the selection with a 3D grooved border. Define a width (in pixels) for the border in the box provided.

**Example:** 

#### **Ridge**

Renders the selection with a 3D ridged border. Define a width (in pixels) for the border in the box provided.

**Example:** 

#### **Inset**

Renders the selection with a 3D inset border. Define a width (in pixels) for the border in the box provided.

**Example:** 

#### **Outset**

Renders the selection with a 3D outset border. Define a width (in pixels) for the border in the box provided.

**Example:** 

**Default:** None.

This dialog contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Saves the changes and closes the window or dialog.

## Create a Change Order Link window

The Create a Change Order Link window opens when you select New Change Order Link from the Insert menu in the HTML Editor.

Use the Create a Change Order Link window to insert a link in the document or template that creates a change order when a user clicks it.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Link Text**

Defines the text of the change order link. When a user clicks the link at runtime, the Create New Change window opens so the user can define a new change order.

**Create Change Order Options**

Specifies whether to create a blank change order or use a specific template to create it. Select one of the following options:

**An Empty Change Order**

Specifies that the product should create a blank change order.

**Change Order Using the Template**

Specifies that the product should create a change order based on values set in the specified template. Click  to open the Change Order Template Search window so you can locate and select the appropriate template.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

---

## Create a Ticket Link window

The Create a Ticket Link window opens when you select New Ticket Link from the Insert menu in the HTML Editor.

Use the Create a Ticket Link window to insert a link in the document or template that creates an issue or request when a user clicks it.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Link Text**

Defines the text of the ticket link. When a user clicks the link at runtime, a Create New window opens so you can define a new issue or request.

### **Create Request Options**

Specifies whether to create a request based on the current document's properties and whether to use a specific template for the request when a user whose preferred ticket type is request clicks the link. Select one of the following options:

#### **The Document Values**

Specifies that the product should create requests based on the values set in the current document.

#### **The Template**

Specifies that the product should create requests based on the specified template. Click  to open the Request Template Search window so you can locate and select the appropriate template.

### **Create Issue Options**

Specifies whether to create an issue based on the current document's properties and whether to base the issue on a specific template when a user whose preferred ticket type is issue clicks the link. Select one of the following options:

#### **The Document Values**

Specifies that the product should create issues based on the values set in the current document.

#### **The Template**

Specifies that the product should create issues based on the specified template. Click  to open the Issue Template Search window so you can locate and select the appropriate template.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

### Explorer User Prompt dialog (merge cells)

The Explorer User Prompt dialog opens when you put the cursor in a table cell and select Merge Cell from the Table menu in the HTML Editor. Use the dialog to define the number of cells to combine.

This dialog contains the following field:

**How many columns would you like to merge?**

Defines how many columns to combine.

**Example:** If you enter 3, the selected column is combined with the two columns immediately to its right. The resulting column occupies the same amount of space as the original columns.

**Default:** 2.

This dialog contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Closes the dialog and opens a second Explorer User Prompt dialog so you can define the number of rows to combine.

### Explorer User Prompt dialog (merge rows)

The Explorer User Prompt dialog opens after you do all of the following:

- Put the cursor in a table cell and select Merge Cell from the Table menu in the HTML Editor
- Enter a number of columns to merge in the field provided on the Explorer User Prompt dialog
- Click OK

Use the dialog to define the number of rows to combine.

---

This dialog contains the following field:

**How many rows would you like to merge?**

Defines how many rows to combine.

**Example:** If you enter 3, the selected row is combined with the two rows immediately below it. The resulting row occupies the same amount of space as the original rows.

**Default:** 2.

This dialog contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Closes the dialog and merges the defined columns and rows.

### Insert Document Link window

The Insert Document Link window opens when you select Document Link from the Insert menu in the HTML Editor.

Use the insert Document Link window to select a document from the knowledge base to link to the document you are editing. When you link a document, its title displays in the document or template you are editing.

This window contains the following fields:

**Categories**

Lists the category and subcategory hierarchy currently defined in the knowledge base. Click  or  as necessary to expand or collapse branches of the tree. When you select a category from the list, its associated documents display in the Documents list.

To link a category to a document, right-click the row and select *Link Category* from the shortcut menu.

**Documents**

Displays the ID and title of each document in the category selected from the Categories list. To link a document in the list with the current document, click its ID.

## Insert/Modify Link dialog

The Insert/Modify Link dialog opens when you select URL Link from the Insert menu in the HTML Editor.

Use the Insert/Modify Link dialog to define a URL to insert as a hyperlink at the current cursor position or to change an existing hyperlink in the document or template you are editing.

- To associate the URL with text in the document or template, select the text before you open the Insert/Modify Link dialog.
- To insert the URL itself as a hyperlink in the document or template, place the cursor at the appropriate position before you open the Insert/Modify Link dialog.

You can also define a tool tip for the link and specify a target window in which the linked information will open at runtime.

This dialog contains the following fields:

### **URL**

Defines the Web address to link.

**Example:** <http://www.ca.com>.

### **Title (tooltip)**

Defines descriptive text that browsers may display as a tool tip when a user points to the link.

### **Target**

Specifies the frame in which to open the linked information. Select one of the following values:

#### **None (use implicit)**

The linked information opens in the default frame (usually the frame in which the link resides).

#### **New Window (\_blank)**

The linked information opens in a new, unnamed frame.

#### **Same Frame (\_self)**

The linked information opens in the same frame as the link (that is, the linked information replaces the information containing the link).

#### **Top Frame (\_top)**

The linked information opens in the full, original frame. If the frame containing the link has no parent, selecting Top Frame (\_top) has the same effect as selecting Same Frame (\_self).

**Other**

Displays a secondary field to the right of the Target list so you can enter the name of the frame in which the linked information should open. The linked information opens in the named frame.

**Default:** None (use implicit).

This dialog contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Saves the changes and closes the window or dialog.

## Insert Image dialog

The Insert Image dialog opens when you select Image from the Insert menu in the HTML Editor.

Use the Insert Image dialog to define the URL of a graphic to add to the document or template or to select a graphic from the Attachment Library. You can also use the Insert Image dialog to specify image properties such as alignment, size, and the amount of blank space around the image.

This dialog contains the following fields:

**Image URL**

Defines the location at which the image to insert resides. You can use .bmp, .gif, .jpg, or .png images.

**Example:** \\c:\images\trees.png

Alternate Text

Defines a text string to display if the web browser cannot display images.

**Alignment**

Specifies the alignment of the image in the document or template. Select one of the following values:

**Not set**

**Uses the web browser's default alignment to display the item.**

**Left**

Aligns the item to the left, with adjacent text flowing to the right of the item.

**Right**

Aligns the item to the right, with adjacent text flowing to the left of the item.

**Texttop**

Aligns the top of the item with the top of the tallest character in the current line of text.

**Absmiddle**

Aligns the middle of the item with the middle of the characters in the current line of text.

**Baseline**

Aligns the bottom of the item with the baseline of the current line of text.

**Absbottom**

Aligns the bottom of the item with the bottom of the lowest character (for example, a lowercase *q*) in the current line of text.

**Bottom**

Aligns text in the same paragraph at the bottom of the item.

**Middle**

Aligns text in the same paragraph at the center of the item.

**Top**

Aligns text in the same paragraph at the top of the item.

**Note:** Alignment may differ slightly depending upon the web browser used, regardless of the Alignment box setting.

**Border Thickness**

Defines the width (in pixels) of the border around the image.

**Horizontal**

Defines the amount of blank space (in pixels) to leave to the left and right of the image.

**Vertical**

Defines the amount of blank space (in pixels) to leave above and below the image.

**Image Preview**

Displays the currently selected image file when you click Preview.

This dialog contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**From Library**

Opens the Attachment Selection window so you can select a .bmp, .gif, .jpg, or .png file to insert from the Attachment Library.

**OK**

Saves the changes and closes the window or dialog.

**Preview**

Displays the image file defined in the Image URL box in the Image Preview box.

## Insert Table dialog

The Insert Table dialog opens when you select Insert Table from the Table menu in the HTML Editor.

Use the Insert Table dialog to define attributes of a table to add at the current cursor position in the document or template.

This dialog contains the following fields:

**Rows**

Defines the number of horizontal rows with which to create the table.

**Default:** 2.

**Cols**

Defines the number of vertical columns with which to create the table.

**Default:** 4.

**Width**

Defines the total width of the table. Enter a whole number in the box, then select a unit of measurement (for example, Pixels) from the list.

**Default:** 100 Percent.

**Alignment**

Specifies the horizontal position of the table in the document or template. The Alignment setting does not affect the data in the table cells. Select one of the following values:

**Not set**

Uses the web browser's default alignment to display the item.

**Left**

Aligns the item to the left, with adjacent text flowing to the right of the item.

**Right**

Aligns the item to the right, with adjacent text flowing to the left of the item.

**Texttop**

Aligns the top of the item with the top of the tallest character in the current line of text.

**Absmiddle**

Aligns the middle of the item with the middle of the characters in the current line of text.

**Baseline**

Aligns the bottom of the item with the baseline of the current line of text.

**Absbottom**

Aligns the bottom of the item with the bottom of the lowest character (for example, a lowercase *q*) in the current line of text.

**Bottom**

Aligns text in the same paragraph at the bottom of the item.

**Middle**

Aligns text in the same paragraph at the center of the item.

**Top**

Aligns text in the same paragraph at the top of the item.

**Note:** Alignment may differ slightly depending upon the web browser used, regardless of the Alignment box setting.

**Border Thickness**

Defines the width (in pixels) of the frame around the table and the rules between cells. For a table with no frame or rules, set this value to **0**.

**Default:** 1.

**Cell Spacing**

Defines how much space (in pixels) browsers should leave between the table and surrounding items. This value also defines the amount of space to leave between cells in the table.

**Default:** 1.

**Cell Padding**

Defines how much space (in pixels) browsers should leave between the borders of a cell and its contents.

**Default:** 1.

This dialog contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Saves the changes and closes the window or dialog.

## Table Properties dialog

The Table Properties dialog opens when you put the cursor in a table cell and select Table Properties from the Table menu in the HTML Editor.

Use the Table Properties dialog to define attributes that affect the layout and style of the entire table.

This dialog contains the following fields:

**Caption**

Defines a brief description of the table. By default, the caption displays above the table at runtime.

**Summary**

Defines a text summary of the table's purpose, content, and layout to provide accessibility in nonvisual web browsers.

**Float**

Specifies the horizontal placement of the table relative to the left or right margins of the containing element, allowing text to wrap around the table when the table does not use the entire width of a page. Select one of the following values:

**None**

Positions the table according to the default alignment (typically to the left) but does not wrap text around the table.

**Left**

Positions the table to the left margin. When the table does not use the entire width of a page, text wraps to the right of the table.

**Right**

Positions the table to the right margin. When the table does not use the entire width of a page, text wraps to the left of the table.

**Default:** None.

### **Width**

Defines the total width of the table. Enter a whole number in the box, then select a unit of measurement (for example, Pixels) from the list.

**Default:** 100 Percent.

### **Text Align**

Specifies the horizontal alignment of data and text in the selected table or cell. Select one of the following values:

#### **Left**

Aligns text and data to the left.

#### **Center**

Aligns text and data to the center.

#### **Right**

Aligns text and data to the right.

#### **Justify**

Aligns text to both the left and right.

**Default:** Left.

### **Height**

Defines the height of the selected table or cell. Enter a whole number in the box, then select a unit of measurement (for example, Pixels) from the list.

### **Vertical Align**

Specifies the vertical alignment of data and text in the table or cell. Select one of the following values:

#### **Top**

Aligns text and data to the top.

#### **Middle**

Aligns text and data to the center.

#### **Bottom**

Aligns text and data to the bottom.

#### **Baseline**

Aligns text so that the first line in each cell of a row rests on a baseline common to all cells in that row. The baseline is the imaginary line on which a line of text rests.

**Default:** Top.

**Spacing**

Defines how much space (in pixels) browsers should leave between the table and surrounding items. This value also defines the amount of space to leave between cells in the table.

**Default:** 1.

**Padding**

Defines how much space (in pixels) browsers should leave between the borders of a cell and its contents.

**Default:** 1.

**Borders**

Defines the width (in pixels) of the frame around the table and the rules between cells. For a table with no frame or rules, set this value to **0**.

**Default:** 1.

**Frames**

Specifies the sides of the table on which to draw rules. Select one of the following options:

**No Sides**

Renders the table with no frame.

**The Top Side Only**

Renders the table with a rule across the top edge.

**The Bottom Side Only**

Renders the table with a rule across the bottom edge.

**The Top and Bottom Sides Only**

Renders the table with rules across the top and bottom edges.

**The Right and Left Sides Only**

Renders the table with rules on the left and right edges.

**The Left-hand Side Only**

Renders the table with a rule on the left edge only.

**The Right-hand Side Only**

Renders the table with a rule on the right edge only.

**All Four Sides**

Renders the table with a frame surrounding it.

**Default:** No Sides.

### Rules

Specifies whether to draw rules between columns and rows in the table. Select one of the following options:

#### No Rules

Renders the table with no rules separating its cells.

#### Rules will Appear Between Rows Only

Renders the table with a horizontal rule separating each row.

#### Rules will Appear Between Columns Only

Renders the table with a vertical rule separating each column.

#### Rules will Appear Between All Rows and Columns

Renders the table with horizontal and vertical rules separating each cell.

**Default:** No Rules.

### Background

Opens the Color Palette so you can select a color to apply to the background of the selected table or cell. When you select a color, the button refreshes to display it. Click  to reset the control so that no color is selected.

**Default:** No color selected.

### Image URL

Defines the location of an image to use as the background for the selected table or cell. You can use .bmp, .gif, .jpg, or .png images.

**Example:** \\c:\images\trees.png

### FG Color

Opens the Color Palette so you can select a color to apply to items in the foreground of the selected table or cell (for example, text and data). When you select a color, the button refreshes to display it. Click  to reset the control so that no color is selected.

**Default:** No color selected.

### Border

Opens the Color Palette so you can select a color to apply to the borders of the selected table or cell. When you select a color, the button refreshes to display it. Click  to reset the control so that no color is selected.

**Default:** No color selected.

### Border Style

Specifies the style used to draw a border around the selected table or cell. Select one of the following options:

**None**

Renders the selection with no border.

**Dotted**

Renders the selection with a dotted border. Define a width (in pixels) for the border in the box provided.

**Example:** .....

**Dashed**

Renders the selection with a dashed border. Define a width (in pixels) for the border in the box provided.

**Example:** .....

**Solid**

Renders the selection with a solid border. Define a width (in pixels) for the border in the box provided.

**Example:** \_\_\_\_\_

**Double**

Renders the selection with a double solid border. Define a width (in pixels) for the border in the box provided.

**Example:** =====

**Groove**

Renders the selection with a 3D grooved border. Define a width (in pixels) for the border in the box provided.

**Example:** 

**Ridge**

Renders the selection with a 3D ridged border. Define a width (in pixels) for the border in the box provided.

**Example:** 

**Inset**

Renders the selection with a 3D inset border. Define a width (in pixels) for the border in the box provided.

**Example:** 

**Outset**

Renders the selection with a 3D outset border. Define a width (in pixels) for the border in the box provided.

**Example:** 

**Default:** None.

### Collapsed Borders

Checking this box removes the cell and table borders from the table.

**Default:** Not selected.

This dialog contains the following buttons:

#### Cancel

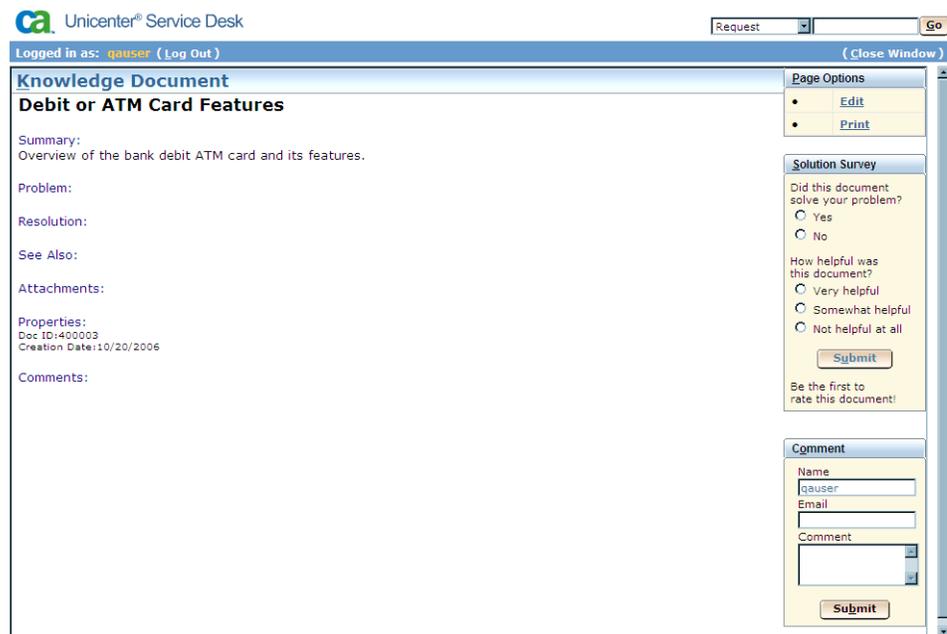
Discards changes and opens view mode.

#### OK

Saves the changes and closes the window or dialog.

## Previewing Documents

To see how a document will appear to an end user, click the User View button in the Document Editor window . The User View window is opened, and the document displays in the format set by its document template:



This is how the document will be displayed to an end user, based on the document template. From this screen, you can also edit and print the document, as well as record a comment and submit responses to a solution survey.

# Chapter 4: HTML Editor

---

The HTML Editor opens when you do any of the following:

- Click Edit Detail on either of the following windows:
  - Create New Document Template
  - Update Document Template
- Click Edit Resolution on either of the following:
  - Create New Document
  - Update Knowledge Document
- Click Edit xxx (HTML) in any of the following DT Builder panes:
  - Conclusion Text (HTML)
  - Query Text (HTML)
  - Tree Description (HTML)

Use the HTML Editor to define the layout and static content of a knowledge document template, to define the layout and content of the Resolution section of a knowledge document, or to define the layout and content of a node in a knowledge tree document. When you finish editing, click OK to close the HTML Editor and return to the originating window so you can preview or save your work.

This window contains the following tabs:

## **Design**

Displays content in WYSIWYG (what you see is what you get) fashion so changes made using the toolbar buttons and menu commands are immediately visible in the editor.

## **Source**

Displays content as HTML code that you can edit directly. This gives you more precise control over the appearance of the content, and lets you make specific changes that may not be possible on the Design tab.

The menu bar at the top of the HTML Editor contains the following menus:

- Edit (see page 48)
- Format (see page 48)
- Insert (see page 49)
- Table (see page 50)

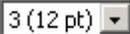
The HTML Editor also includes a shortcut menu (see page **Error! Bookmark not defined.**) that opens when you right-click in the editing area of the Design tab.

The HTML Editor toolbar contains the following controls:

 **Font**

Specifies a font (for example, Arial or Courier) to apply to selected text.

**Default:** Times New Roman.

 **Size**

Specifies a font size from 1 (the smallest) to 7 (the largest) to apply to selected text.

**Default:** 3 (12 pt).

 **Paragraph**

Specifies a paragraph style (for example, Heading1 or Normal) to apply to selected text.

**Default:** Normal.

 **B Bold**

Renders the selected text in a bold weight font.

 **I Italic**

Renders the selected text in an italic font.

 **U Underline**

Renders the selected text with a line beneath it.

 **S Strikethrough**

Renders the selected text with a line through it.

 **T Font Color**

Opens the Color Palette so you can select a color to apply to selected text.

 **Background Color**

Opens the Color Palette so you can select a color to apply to the background of the document or template.

 **Justify Left**

Aligns the selected text to the left.

 **Justify Center**

Centers the selected text.

**Justify Right**

Aligns the selected text to the right.

**Ordered List**

Formats the selected text as an ordered (that is, sequentially numbered) list.

**Bulleted List**

Formats the selected text as an unordered (that is, bulleted) list.

**Decrease Indent**

Moves the selected text one tab level to the left.

**Increase Indent**

Moves the selected text one tab level to the right.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Saves the changes and closes the window or dialog.

## Menus

The menu bar at the top of the HTML Editor contains the following menus:

- Edit
- Format
- Insert
- Table

The HTML Editor also includes a shortcut menu that opens when you right-click in the editing area of the Design tab.

## Edit menu

Use the commands on the Edit menu in the HTML Editor to copy or move a selection in the Design or Source tab or to undo or redo your last action.

**Important:** Do not add any HTML tags above the Body tag, because it will cause a runtime error.

This menu contains one or more of the following commands:

### **Cut**

Removes the selected text or image from the document or template and puts it on the Clipboard.

### **Copy**

Puts a copy of the selected text or image on the Clipboard. Copying does not remove the selection from the document or template.

### **Paste**

Puts text or an image copied or cut to the Clipboard at the current cursor location in the document or template.

### **Undo**

Reverses the previous action.

### **Redo**

Reverses the previous Undo action. The Redo command only works if your previous action was to select the Undo command.

## Format menu

Use the commands on the Format menu in the HTML Editor to apply specific formatting to the text selected in the Design tab.

This menu contains one or more of the following commands:

### **Subscript**

Renders the selected text slightly below the current baseline.

### **Superscript**

Renders the selected text slightly above the current baseline.

### **Justify Left**

Aligns the selected text to the left.

**Justify Center**

Centers the selected text.

**Justify Right**

Aligns the selected text to the right.

**Justify Full**

Aligns the selected text to the right and left.

**Direction Left to Right**

Defines the base direction of selected text as left-to-right.

**Direction Right to Left**

Defines the base direction of selected text as right-to-left.

## Insert menu

Use the commands on the Insert menu in the HTML Editor to insert links, images, horizontal rules, and so on into the document or template.

**Important:** Do not add any HTML tags above the Body tag, because it will cause a runtime error.

This menu contains one or more of the following commands:

**New Line**

Adds a line to the document or template and places the cursor in it.

**Horizontal Rule**

Inserts a horizontal rule at the current cursor position.

**URL Link**

Opens the Insert/Modify Link dialog so you can associate a linked URL with selected text. If you do not select text, the HTML Editor inserts the actual URL you specify at the current cursor position.

**Image**

Opens the Insert Image dialog so you can add a .gif, .jpg, or .png graphic at the current cursor position.

**Document Link**

Opens the Insert Document Link window so you can associate a linked document with selected text. If you do not select text, the HTML Editor inserts a link to the selected document at the current cursor position.

### **New Ticket Link**

Opens the Create a Ticket Link window so you can insert a link in the document or template that creates an issue or request when a user clicks it.

### **New Change Order Link**

Opens the Create a Change Order Link window so you can insert a link in the document or template that creates a change order when a user clicks it.

## **Table menu**

Use the commands on the Table menu in the HTML Editor to create and manage the rows, columns, and cells in a table in the document or template.

This menu contains one or more of the following commands:

### **Insert Table**

Opens the Insert Table dialog so you can define the attributes of a table to insert at the current cursor position.

### **Table Properties**

Opens the Table Properties dialog so you can define attributes that affect the entire table.

### **Insert Row Above**

Inserts a new row above the currently selected row in a table. The new row has the same attributes as the selected row.

### **Insert Row Below**

Inserts a new row below the currently selected row in a table. The new row has the same attributes as the selected row.

### **Delete Row**

Deletes the currently selected row and its content from the table.

### **Split Row**

Divides the selected row into two rows at the current cursor position.

### **Insert Column Above**

Inserts a new column to the left of the currently selected column in a table. The new column has the same attributes as the selected column.

### **Insert Column Below**

Inserts a new column to the right of the currently selected column in a table. The new column has the same attributes as the selected column.

**Delete Column**

Deletes the currently selected column and its content from the table.

**Split Column**

Divides the selected column into two columns at the current cursor position.

**Insert Cell Above**

Inserts a new cell to the left of the currently selected cell in a table and moves subsequent existing cells in the same row to the right.

**Insert Cell Below**

Inserts a new cell to the right of the currently selected cell in a table and moves subsequent existing cells in the same row to the right.

**Delete Cell**

Deletes the currently selected cell and its content from the table and moves subsequent existing cells in the same row to the left.

**Split Cell**

Divides the selected cell into two cells at the current cursor position.

**Merge Cell**

Opens Explorer User Prompt dialogs so you can specify the number of cells and rows to merge.

**Cell Properties**

Opens the Cell Properties dialog so you can define attributes that affect the currently selected cell in a table.

## HTML Editor shortcut menu

The HTML Editor shortcut menu opens when you right-click an element in the HTML Editor and the editor is in WYSIWYG mode. The commands displayed depend on the element you select.

**Important:** Do not add any HTML tags above the Body tag, because it will cause a runtime error.

This menu contains one or more of the following commands:

**Undo**

Reverses the previous action.

**Cut**

Removes the selected text or image from the document or template and puts it on the Clipboard.

**Copy**

Puts a copy of the selected text or image on the Clipboard. Copying does not remove the selection from the document or template.

**Paste**

Puts text or an image copied or cut to the Clipboard at the current cursor location in the document or template.

**Delete**

Deletes the selected element from the Design tab in the HTML Editor.

**Select All**

Selects all elements on the Design tab in the HTML Editor.

# Chapter 5: Document Tree Builder

---

The Document Tree Builder (DT Builder) is a visual tool for designing and building knowledge tree documents for inclusion in a knowledge base. A knowledge tree is a representation of expert knowledge in a particular area. Each tree is constructed to guide the user through the process of resolving a problem, performing a procedure, or achieving a specified goal.

You can use DT Builder to:

- Add, delete, rename, copy, cut, and paste decision nodes in a hierarchical tree structure
- Use plain text or the HTML Editor to design query nodes that pose questions, supply possible answers to questions, or serve as parent nodes for further subnodes in the tree
- Use plain text or the HTML Editor to design conclusion nodes to supply the final answer to a query or to end a procedure
- Link jump nodes to previously defined nodes in a procedure or query
- Check for and correct errors in the decision tree logic
- View node layout as it will display at runtime

## Windows

The DT Builder includes a number of windows and dialogs to help you create and edit knowledge trees. Windows and dialogs open when you click a button on a pane or on another window or dialog or when you select a command from a menu or shortcut menu.

## Menus

The menu bar at the top of the right pane of the DT Builder window provides access to features with which you can build and edit knowledge trees.

The menu bar contains the following menus:

- Tree
- Node Actions
- Edit
- Options
- View
- Window
- Help

In addition to the menus listed above, the Tree pane shortcut menu in the DT Builder opens when you right-click a branch in the tree.

## Tree menu

The commands on the Tree menu let you check for errors, save changes to a knowledge tree, and close the DT Builder window.

This menu contains one or more of the following commands:

### **Save and Close**

Saves changes made to the knowledge tree since you last saved it and closes the DT Builder window. This command is also available on the toolbar.

### **Save**

Saves changes made to the knowledge tree since you last saved it, but does not close the DT Builder window. This command is also available on the toolbar.

### **Check Errors**

Checks the knowledge tree for errors, and (if errors exist) displays them in the Results of Error Check pane. This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

### **Exit**

Prompts you to save your changes, then closes the DT Builder window.

## Node Actions menu

The commands on the Node Actions menu let you add, rename, and delete nodes in the knowledge tree.

This menu contains one or more of the following commands:

### **Add Query**

Adds a query node to the query node currently selected in the Tree pane. You cannot add a query node to the primary node, a conclusion node, or a jump node. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

### **Add Conclusion**

Adds a conclusion node to the query node currently selected in the Tree pane. You cannot add a conclusion node to the primary node, a conclusion node, or a jump node. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

### **Add Jump**

Adds a jump node to the query node currently selected in the Tree pane. You cannot add a jump node to the primary node, a conclusion node, or a jump node. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

### **Rename**

Opens the Prompt window so you can change the name of the node currently selected in the Tree pane. You cannot rename the primary node. This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

### **Link Jump Node**

Links the currently selected jump node to the next node you select. You cannot link a jump node to the primary node or to another jump node. This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

### **Delete**

Deletes the currently selected node (and its subnodes) from the knowledge tree without putting them on the clipboard. When you delete a query node, the query and its responses are removed from the knowledge tree. You cannot delete the primary node. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

**Note:** By default, the DT Builder prompts you to confirm node deletion. Click OK to close the prompt and delete the node and its subnodes.

## Edit menu

The commands on the Edit menu let you copy, cut, and paste nodes in the knowledge tree.

This menu contains one or more of the following commands:

### Copy

Puts a copy of the currently selected node (and its subnodes) on the Clipboard. You cannot copy the primary node to the Clipboard. When you copy a query node, its responses are also copied. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

### Copy Single Node

Puts a copy of the currently selected node (but not its subnodes or responses) on the Clipboard. You cannot copy the primary node to the Clipboard. This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

### Cut

Removes the currently selected node (and its subnodes) from the Tree pane and puts it on the Clipboard. When you cut a query node, the query and its responses are removed from the knowledge tree. Use the Cut command to move a node and its subnodes from one branch of the knowledge tree to another. You cannot cut the primary node or the root node to the Clipboard. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

### Paste

Pastes a previously copied or cut node (and its subnodes) under the selected query node. You can only paste a node under a query node. This command is also available on the toolbar and on the shortcut menu that opens when you right-click a node in the Tree pane.

## Options menu

The commands on the Options menu let you personalize your interaction with the DT Builder.

This menu contains one or more of the following commands:

### Copy Response

Specifies whether to use response text as the name of an associated node when you create it.

- Select this command to automatically use the text of a node as its name when you create it. When the command is active, a check mark displays to the left of the command name on the menu.
- Clear this command to use the default name (Default Node Name) when you create a node. You can use the Rename command on the Node Actions menu to change the node's name.

This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

**Default:** Selected.

#### **Prompt on Node Delete**

Specifies whether the DT Builder prompts you before deleting nodes.

- Select this command to display a confirmation prompt before deleting nodes. When the command is active, a check mark displays to the left of the command name on the menu.
- Clear this command if you do not want the DT Builder to prompt you to confirm node deletion.

This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

**Default:** Selected.

## View menu

The Results of Error Check pane opens at the bottom of the DT Builder window when you select Check Errors from the Tree menu and the DT Builder finds errors in the knowledge tree. Use the commands on the View menu, which are only available when the DT Builder finds errors, to open and close the Results of Error Check pane.

This menu contains one or more of the following commands:

#### **Hide Errors**

Closes the Results of Error Check pane if it is displayed on the DT Builder window.

#### **Show Errors**

Opens the Results of Error Check pane when the DT Builder has found errors in the knowledge tree and the pane is not displayed on the DT Builder window.

## Window menu

The commands on the Window menu let you manage which windows and dialogs display on your screen. This menu contains one or more of the following commands:

### **Close All Popups**

Closes all currently open Knowledge Tools windows except the main window.

### **List All Windows**

Opens the Windows window, which lists all currently open Knowledge Tools windows. Click a window name to move focus to the selected window.

### **View Main Page**

Moves focus to the main Knowledge Tools window. This command only displays on windows other than the main Knowledge Tools window.

## Help menu

This menu contains one or more of the following commands:

### **Knowledge Tools Help**

Opens a window that provides online help information about the main interface window. The Contents, Index, and Search tabs appear on the left, allowing you to navigate the help system.

### **Help on This Window**

Opens a window that provides online help information about the currently active Knowledge Tools pane or window.

### **Power User Tips**

Opens a window that provides help information such as keyboard shortcuts for expert Knowledge Tools users.

### **Screen Reader Usage**

This Help menu item opens a window explaining how to use a Screen Reader with Knowledge Tools.

### **Support for Knowledge Tools**

Opens the CA support web site for Knowledge Tools.

### **Operations Info**

Typically, this Help menu command displays a window showing information about your product installation, such as hours of operation and contact information.

The information displayed on this window is contained in the file:  
`$NX_ROOT/bopcfg/www/html/web/analyst/about.html`.

If you want to customize this file for your installation, please copy it to:  
\$NX\_ROOT/site/mods/www/html/web/analyst/about.html-

and then make the required changes.

### **About Knowledge Tools**

Opens the About window, which provides information about this version of the product, third party notices, technical support information, and system information. Click Done to close the About window.

## Logout menu

This menu contains the following command:

### **Exit Knowledge Tools**

Ends the current Unicenter SD session and displays the Login window.

## Tree pane shortcut menu

The Tree pane shortcut menu opens when you right-click a node in the Tree pane on the DT Builder window.

This menu contains one or more of the following commands:

### **Copy**

Puts a copy of the currently selected node (and its subnodes) on the Clipboard. You cannot copy the primary node to the Clipboard. When you copy a query node, its responses are also copied.

### **Copy Single Node**

Puts a copy of the currently selected node (but not its subnodes or responses) on the Clipboard. You cannot copy the primary node to the Clipboard.

### **Cut**

Removes the currently selected node (and its subnodes) from the Tree pane and puts it on the Clipboard. When you cut a query node, the query and its responses are removed from the knowledge tree. Use the Cut command to move a node and its subnodes from one branch of the knowledge tree to another. You cannot cut the primary node or the root node to the Clipboard.

### **Paste**

Pastes a previously copied or cut node (and its subnodes) under the selected query node. You can only paste a node under a query node.

### **Add Query**

Adds a query node to the query node currently selected in the Tree pane. You cannot add a query node to the primary node, a conclusion node, or a jump node.

### **Add Conclusion**

Adds a conclusion node to the query node currently selected in the Tree pane. You cannot add a conclusion node to the primary node, a conclusion node, or a jump node.

### **Add Jump**

Adds a jump node to the query node currently selected in the Tree pane. You cannot add a jump node to the primary node, a conclusion node, or a jump node.

### **Rename**

Opens the Prompt window so you can change the name of the node currently selected in the Tree pane. You cannot rename the primary node.

### **Link Jump Node**

Links the currently selected jump node to the next node you select. You cannot link a jump node to the primary node or to another jump node.

### **Delete**

Deletes the currently selected node (and its subnodes) from the knowledge tree without putting them on the clipboard. When you delete a query node, the query and its responses are removed from the knowledge tree. You cannot delete the primary node.

### **Check Errors**

Checks the knowledge tree for errors, and (if errors exist) displays them in the Results of Error Check pane.

### **Copy Response**

Specifies whether to use response text as the name of an associated node when you create it.

- Select this command to automatically use the text of a node as its name when you create it. When the command is active, a check mark displays to the left of the command name on the menu.
- Clear this command to use the default name (Default Node Name) when you create a node. You can use the Rename command on the Node Actions menu to change the node's name.

This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

**Default:** Selected.

### Prompt on Node Delete

Specifies whether the DT Builder prompts you before deleting nodes.

- Select this command to display a confirmation prompt before deleting nodes. When the command is active, a check mark displays to the left of the command name on the menu.
- Clear this command if you do not want the DT Builder to prompt you to confirm node deletion.

This command is also available on the shortcut menu that opens when you right-click a node in the Tree pane.

**Default:** Selected.

## DT Builder window

The DT Builder Tree Designer window opens when you do either of the following:

- Click the Design Tree button on the Content tab of the Create New Tree Document window
- Click the Design Tree button on the Content tab of the Update Tree Document window

This window has the following main components:

### Tree Pane

The left pane, or Tree pane, displays the nodes that comprise the knowledge tree. Each node represents a step in the process presented by the knowledge tree. A well-constructed knowledge tree guides the user along a systematic path to answering a question, resolving a problem, or completing a process. Click  or  as appropriate to open or close nodes in the Tree pane. When you click a node in the Tree pane, the associated information displays in the right pane.

**Note:** The right pane is empty when you select a Jump node (denoted by .

### Menu Bar

The menu bar at the top of the right pane of the DT Builder window provides access to features with which you can build and edit knowledge trees.

### Toolbar

The toolbar, located just below the menu bar in the right pane of the DT Builder window, contains shortcuts for some of the features available from the menu bar.

### **Tree Description (HTML)**

When you select the primary node (denoted by ) in the Tree pane, the right pane contains the description that displays when a user clicks the Tree Description link while viewing the document in tree view. You can edit the description directly in the Tree Description (HTML) pane, or you can click Edit Tree Description (HTML) to open the HTML Editor so you can more precisely format the text.

### **Query Text (HTML) Pane**

When you select a query node (denoted by ) in the Tree pane, the right pane contains the text defined in the knowledge tree for the selected node. The query text typically contains a question (the answer to which determines the next node in the tree) or a step in a procedure. The Query Text (HTML) pane also displays a field for each possible response (query, jump, or conclusion) to the question or instruction displayed in the Query Text (HTML) box. Each response corresponds to a subnode of the selected query node in the Tree pane. You can edit text directly in the Query Text (HTML) pane, or you can click Edit Query Text (HTML) to open the HTML Editor so you can more precisely format the text.

### **Conclusion Text (HTML) Pane**

When you select a conclusion node (denoted by ) in the Tree pane, the right pane contains the text defined in the knowledge tree for the selected node. The conclusion text typically describes the resolution for a particular problem, the final step in a procedure, or a possible termination point in a query. You can edit text directly in the Conclusion Text (HTML) pane, or you can click Edit Conclusion Text (HTML) to open the HTML Editor so you can more precisely format the text.

### **Results of Error Check Pane**

The Results of Error Check pane opens at the bottom of the DT Builder window when you select Check Errors from the Tree menu and the DT Builder finds errors in the knowledge tree. The error messages displayed help you locate and fix errors in the knowledge tree. When the DT Builder finds no errors in the tree, the pane does not open. Use the commands on the View menu, which are only available when the DT Builder finds errors, to open and close the Results of Error Check pane.

## Tree Description (HTML) pane

When you select the primary node (denoted by ) in the Tree pane, the right pane contains the description that displays when a user clicks the Tree Description link while viewing the document in tree view. You can edit the description directly in the Tree Description (HTML) pane, or you can click Edit Tree Description (HTML) to open the HTML Editor so you can more precisely format the text.

You can use the following keyboard shortcuts when editing text in the pane:

**Ctrl+C**

Puts a copy of the currently selected text on the Clipboard.

**Ctrl+X**

Removes the currently selected text and puts it on the Clipboard.

**Ctrl+V**

Pastes previously copied or cut text at the current cursor position.

**Ctrl+Z**

Reverses the previous action.

**Ctrl+Y**

Reverses the previous Undo action.

For more robust editing, click Edit Tree Description (HTML) to use the HTML Editor to define the layout and content of the text.

This pane contains the following fields:

**Tree Description HTML**

Defines the tree description.

**Quick View**

Specifies to display content in the associated field as it will appear at runtime.

**HTML Source**

Specifies to display content in the associated field as editable HTML source code. Select this option to make simple changes directly to the HTML code.

This pane contains the following button:

**Edit Tree Description (HTML)**

Opens the HTML Editor so you can use plain text or HTML elements to design a tree description for the knowledge tree document.

## Query Text (HTML) pane

When you select a query node (denoted by ) in the Tree pane, the right pane contains the text defined in the knowledge tree for the selected node. The query text typically contains a question (the answer to which determines the next node in the tree) or a step in a procedure. The Query Text (HTML) pane also displays a field for each possible response (query, jump, or conclusion) to the question or instruction displayed in the Query Text (HTML) box. Each response corresponds to a subnode of the selected query node in the Tree pane. You can edit text directly in the Query Text (HTML) pane, or you can click Edit Query Text (HTML) to open the HTML Editor so you can more precisely format the text.

You can use the following keyboard shortcuts when editing text in the pane:

### **Ctrl+C**

Puts a copy of the currently selected text on the Clipboard.

### **Ctrl+X**

Removes the currently selected text and puts it on the Clipboard.

### **Ctrl+V**

Pastes previously copied or cut text at the current cursor position.

### **Ctrl+Z**

Reverses the previous action.

### **Ctrl+Y**

Reverses the previous Undo action.

For more robust editing, click Edit Query Text (HTML) to use the HTML Editor to define the layout and content of the text.

This pane contains the following fields:

### **Query Text (HTML)**

Defines the text of the question or step.

### **Quick View**

Specifies to display content in the associated field as it will appear at runtime.

### **HTML Source**

Specifies to display content in the associated field as editable HTML source code. Select this option to make simple changes directly to the HTML code.

## Responses

Defines a field for each possible response (query, jump, or conclusion) to the question or instruction displayed in the Query Text (HTML) box. Each response corresponds to a subnode of the query node selected in the Tree pane.

- To edit the name of a response, enter your changes in the box provided.
- To edit the text of a response, select the response node in the Tree pane and edit it in the Query Text (HTML) pane or the Conclusion Text (HTML) pane, as appropriate.

This pane contains the following button:

### Edit Query Text (HTML)

Opens the HTML Editor so you can use plain text or HTML elements to design a query for the knowledge tree document.

## Conclusion Text (HTML) pane

When you select a conclusion node (denoted by ) in the Tree pane, the right pane contains the text defined in the knowledge tree for the selected node. The conclusion text typically describes the resolution for a particular problem, the final step in a procedure, or a possible termination point in a query. You can edit text directly in the Conclusion Text (HTML) pane, or you can click Edit Conclusion Text (HTML) to open the HTML Editor so you can more precisely format the text.

You can use the following keyboard shortcuts when editing text in the pane:

### Ctrl+C

Puts a copy of the currently selected text on the Clipboard.

### Ctrl+X

Removes the currently selected text and puts it on the Clipboard.

### Ctrl+V

Pastes previously copied or cut text at the current cursor position.

### Ctrl+Z

Reverses the previous action.

### Ctrl+Y

Reverses the previous Undo action.

For more robust editing, click Edit Conclusion Text (HTML) to use the HTML Editor to define the layout and content of the text.

This pane contains the following fields:

**Conclusion Text (HTML)**

Defines the text of the resolution for a particular problem, the final step in a procedure, or a possible termination point in a query.

**Quick View**

Specifies to display content in the associated field as it will appear at runtime.

**HTML Source**

Specifies to display content in the associated field as editable HTML source code. Select this option to make simple changes directly to the HTML code.

This pane contains the following button:

**Edit Conclusion Text (HTML)**

Opens the HTML Editor so you can use plain text or HTML elements to design a conclusion for a query in the knowledge tree document.

## Results of Error Check pane

The Results of Error Check pane opens at the bottom of the DT Builder window when you select Check Errors from the Tree menu and the DT Builder finds errors in the knowledge tree. The error messages displayed help you locate and fix errors in the knowledge tree. When the DT Builder finds no errors in the tree, the pane does not open. Use the commands on the View menu, which are only available when the DT Builder finds errors, to open and close the Results of Error Check pane.

For each error encountered, the Results of Error Check pane displays the name of the node that contains the error and a description of the error. For example, the following error indicates that no query text or conclusion text (depending on the node type) was specified for the Type of Use node:

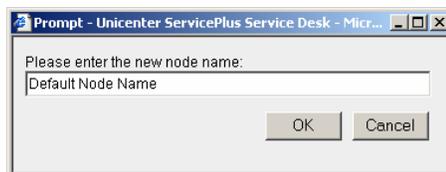
- *Type of Use* - Node displayed text is empty

Use the commands on the View menu, which are only available if the DT Builder finds errors in the knowledge tree, to open and close the Results of Error Check pane.

## Prompt window

The Prompt window opens when you do either of the following:

- Select a node from the Tree pane and select Rename from the Node Actions menu
- Right-click a node in the Tree pane and select Rename from the shortcut menu



Use the window to enter a new name for the selected node.

This window contains the following field:

### Please Enter the New Node Name

Defines the new name for the selected node.

This window contains the following buttons:

### Cancel

Discards changes and opens view mode.

### OK

Saves the changes and closes the window or dialog.

## Toolbar

The toolbar, located just below the menu bar in the right pane of the DT Builder window, contains shortcuts for some of the features available from the menu bar.

The following table details each toolbar button, its function, and the menu command with which it is associated.

Toolbar Button	Function	Menu/Command
	Saves changes made to the knowledge tree since you last saved it and closes the DT Builder window.	Tree/Save and Close

Toolbar Button	Function	Menu/Command
	Saves changes made to the knowledge tree since you last saved it, but does not close the DT Builder window.	Tree/Save
	Puts a copy of the currently selected node (and its subnodes) on the Clipboard. You cannot copy the primary node to the Clipboard. When you copy a query node, its responses are also copied.	Edit/Copy
	Removes the currently selected node (and its subnodes) from the Tree pane and puts it on the Clipboard. When you cut a query node, the query and its responses are removed from the knowledge tree. Use the Cut command to move a node and its subnodes from one branch of the knowledge tree to another. You cannot cut the primary node or the root node to the Clipboard.	Edit/Cut
	Pastes a previously copied or cut node (and its subnodes) under the selected query node. You can only paste a node under a query node.	Edit/Paste
	Adds a query node to the query node currently selected in the Tree pane. You cannot add a query node to the primary node, a conclusion node, or a jump node.	Node Actions/Add Query
	Adds a conclusion node to the query node currently selected in the Tree pane. You cannot add a conclusion node to the primary node, a conclusion node, or a jump node.	Node Actions/Add Conclusion
	Adds a jump node to the query node currently selected in the Tree pane. You cannot add a jump node to the primary node, a conclusion node, or a jump node.	Node Actions/Add Jump

Toolbar Button	Function	Menu/Command
	Deletes the currently selected node (and its subnodes) from the knowledge tree without putting them on the clipboard. When you delete a query node, the query and its responses are removed from the knowledge tree. You cannot delete the primary node.	Node Actions/Delete

**Note:** You can only add a query, conclusion, or jump node under a query node.

## Tree pane

The left pane, or Tree pane, displays the nodes that comprise the knowledge tree. Each node represents a step in the process presented by the knowledge tree. A well-constructed knowledge tree guides the user along a systematic path to answering a question, resolving a problem, or completing a process. Click  or  as appropriate to open or close nodes in the Tree pane. When you click a node in the Tree pane, the associated information displays in the right pane.

The following information displays in the right pane of the DT Builder window when you select a node in the Tree pane:

Icon	Node Type	Right Pane Display
	Primary	Tree Description (HTML) pane
	Query	Query Text (HTML) pane
	Conclusion	Conclusion Text (HTML) pane
	Jump	N/A

You can right-click a node in the Tree pane to open a shortcut menu that contains a subset of commands from the Edit, Node Actions, Options, Tree, and View menus.

**Note:** The right pane is empty when you select a Jump node (denoted by .

## Procedures

The following topics provide procedures for using the DT Builder to create and edit knowledge trees.

### Access the DT Builder for a New Knowledge Tree Document

To access the DT Builder so you can create a new knowledge tree, follow these steps:

1. Right-click the category or subcategory in which to add the new document in the Category pane, then select Create Knowledge Tree Document from the shortcut menu.

**Note:** You cannot create a document directly under the TOP category. If necessary, add a new category in which to create the document.

The Create New Document window opens.

2. Complete the fields on the Content tab as appropriate.
3. Click Design Tree.

The DT Builder opens.

### Access the DT Builder for an Existing Knowledge Tree Document

To access the DT Builder so you can edit an existing knowledge tree, follow these steps:

1. Select the category or subcategory in which the document resides from the Category pane on the Knowledge Categories tab.

The Knowledge Document List pane refreshes to display the contents of the selected category or subcategory.

2. Click the title of the knowledge tree document to edit in the Knowledge Document List pane.

The selected document opens in the Update Knowledge Document window.

If the document has been published, you may need to unpublish it before making changes.

Click Design Tree on the Content tab.

The DT Builder opens.

## Add a Conclusion Node

Use a conclusion node to describe the resolution for a particular problem, the final step in a procedure, or a possible termination point in a query. Conclusion nodes do not have subnodes. You would not typically nest a conclusion node immediately beneath the root node of a knowledge tree.

**Note:** You can add up to seven subnodes to a query node.

To add a conclusion node, follow these steps:

1. Select the query node (denoted by ) under which to add the conclusion node in the Tree pane.

The Query Text (HTML) pane opens.

2. Click  (Add Conclusion).

The DT Builder adds a conclusion node below the selected node in the Tree pane and adds a response field in the Query Text (HTML) pane.

3. Enter a response to the question or statement posed in the parent node in the new field in the Query Text (HTML) pane.
4. (Optional) To rename the new node, right-click it in the Tree pane, then select Rename from the shortcut menu. The Prompt window opens. Enter a new name for the node and click OK to close the Prompt window. The Tree pane refreshes to show the new node name.
5. Select the new conclusion node in the Tree pane.

The Conclusion Text (HTML) pane opens.

6. Do one of the following in the Conclusion Text (HTML) pane:
  - Enter the displayed text (that is, the information associated with the node) in the Conclusion Text (HTML) box. You can use plain text or enter HTML codes as appropriate. To preview the text as it will appear at runtime, select the Quick View option.
  - Click Edit Conclusion Text (HTML) to open the HTML Editor so you can design the information associated with the node in WYSIWYG (what you see is what you get) format. When you finish editing the information, click OK to save your work and close the HTML Editor.

7. Click  (Save).

The DT Builder saves your changes.

## Add a Jump Node

Use a jump node to link to previously defined nodes in the knowledge tree. For example, if the answer to the query posed in a parent node requires repetition of previous steps in a procedure. Jump nodes do not have subnodes. You would not typically nest a jump node immediately beneath the root node of a knowledge tree.

**Note:** You can add up to seven subnodes to a query node.

To add a jump node, follow these steps:

1. Select the query node (denoted by ) under which to add the jump node in the Tree pane.

The Query Text (HTML) pane opens.

2. Click  (Add Jump).

The DT Builder adds a jump node below the selected node in the Tree pane and adds a response field in the Query Text (HTML) pane.

3. Enter a response to the question or statement posed in the parent node in the new field in the Query Text (HTML) pane.
4. Right-click the new jump node in the Tree pane, then select Link Jump Node from the shortcut menu.
5. Select the query or conclusion node to which to link the jump node in the Tree pane.

The jump node's name in the Tree pane changes to include the name of the linked query or conclusion node. For example, if you linked a node called "Wednesday", the jump node name changes to "NODE: Wednesday." When a user selects the jump node in the knowledge tree at runtime, the linked query or conclusion node displays.

6. Click  (Save).

The DT Builder saves your changes.

## Add a Query Node

Use a query node to supply a possible answer to the question posed in its parent node and to serve as a parent node for further subnodes in the tree. The query text typically contains a question (the answer to which determines the next node in the tree) or a step in a procedure. Query nodes can have conclusion nodes, jump nodes, and other query nodes as subnodes.

**Note:** You can add up to seven subnodes to a query node.

To add a query node, follow these steps:

1. Select the query node (denoted by ) under which to add the new query node in the Tree pane.

The Query Text (HTML) pane opens.

2. Click  (Add Query).

The DT Builder adds a query node below the selected node in the Tree pane and adds a response field in the Query Text (HTML) pane.

3. Enter a response to the question or statement posed in the parent node in the new field in the Query Text (HTML) pane.
4. (Optional) To rename the new node, right-click it in the Tree pane, then select Rename from the shortcut menu. The Prompt window opens. Enter a new name for the node and click OK to close the Prompt window. The Tree pane refreshes to show the new node name.
5. Select the new query node in the Tree pane.

The Query Text (HTML) pane opens.

6. Do one of the following in the Query Text (HTML) pane:
  - Enter the displayed text (that is, the information associated with the node) in the Query Text (HTML) box. You can use plain text or enter HTML codes as appropriate. To preview the text as it will appear at runtime, select the Quick View option.
  - Click Edit Query Text (HTML) to open the HTML Editor so you can design the information associated with the node in WYSIWYG (what you see is what you get) format. When you finish editing the information, click OK to save your work and close the HTML Editor.

7. Click  (Save).

The DT Builder saves your changes.

## Add the Tree Description

The tree description displays at runtime when a user clicks the Tree Description link while viewing a knowledge tree document in tree view. For example, if you design a knowledge tree to help a customer choose a credit card, you might define a tree description such as "Use this document to find the best credit card for you."

To define the tree description for a knowledge tree document, follow these steps:

1. Select the knowledge tree's primary node (denoted by ) in the Tree pane.

The Tree Description (HTML) pane opens.

Do one of the following in the Tree Description (HTML) pane:

- Enter the displayed text (that is, the information for the tree description) in the Tree Description (HTML) box. You can use plain text or enter HTML codes as appropriate. To preview the text as it will appear at runtime, select the Quick View option.
- Click Edit Tree Description (HTML) to open the HTML Editor so you can design the tree description in WYSIWYG (what you see is what you get) format. When you finish editing the information, click OK to save your work and close the HTML Editor.

2. Click  (Save).

The DT Builder saves your changes.

## Add the Displayed Text for a Node

Use the Tree Description (HTML), Query Text (HTML), and Conclusion Text (HTML) panes to design the information displayed for a particular node. Displayed text presents the description of the knowledge tree, poses a question, or presents information to help the user navigate the knowledge tree.

To add displayed text for a node, follow these steps:

1. Select the primary node (denoted by ) , query node (denoted by ) , or conclusion node (denoted by ) for which to add displayed text in the Tree pane.

Depending upon the node you selected, one of the following panes opens:

If you selected the primary node, the Tree Description (HTML) pane opens.

- If you selected a query node, the Query Text (HTML) pane opens.
- If you selected a conclusion node, the Conclusion Text (HTML) pane opens.

2. Do one of the following in the Tree Description (HTML), Query Text (HTML), or Conclusion Text (HTML) pane:
  - Enter the displayed text (that is, the information associated with the node) in the field provided. You can use plain text or enter HTML codes as appropriate. To preview the text as it will appear at runtime, select the Quick View option.
  - Click the Edit xxx (HTML) button to open the HTML Editor so you can design the information associated with the node in WYSIWYG (what you see is what you get) format. When you finish editing the information, click OK to save your work and close the HTML Editor.
3. Click  (Save).

The DT Builder saves your changes.

## Add the Response Text for a Node

When you add a node to an existing query node in the Tree pane, the DT Builder adds a response box for the added node in the right pane. Use the box to specify a response to the question or statement posed in the Query Text (HTML) pane.

To add response text for a node, follow these steps:

1. Select the query node (denoted by ) that contains the node for which to add response text in the Tree pane.

The Query Text (HTML) pane opens.

2. Locate the response box for which to specify text in the Query Text (HTML) pane, then enter a response to the question or statement posed by the parent node.

**Note:** By default, the response text you enter replaces the node name in the Tree pane (that is, the DT Builder synchronizes the response text and the node name). To disable synchronization, select the Copy Response command from the Options menu to clear the check mark from it.

3. Click  (Save).

The DT Builder saves your changes.

## Check a Knowledge Tree for Errors

To check a knowledge tree for errors, follow these steps:

1. Select Check Errors from the Tree menu.

The DT Builder scans the knowledge tree for missing displayed text, responses, and links, then displays the results in the Errors pane at the bottom of the window.

2. Select an error in the Errors pane to display its associated node.

The DT Builder selects the node in the Tree pane and displays its definition in the right pane.

3. Correct the indicated error.

4. Click  (Save).

The DT Builder saves your changes.

## Copy and Paste a Node and Its Subnodes

To copy a node and its subnodes in the DT Builder window, follow these steps:

1. Select the node to copy in the Tree pane.

**Note:** You cannot copy the primary node.

2. Click  (Copy).

The DT Builder puts a copy of the selected node and its subnodes in memory. The node and its subnodes remain in memory until you cut or copy another item.

**Note:** This action does not remove the selected node or its subnodes from the knowledge tree. To remove the selected node and its subnodes from the knowledge tree and put it in memory, use the Cut action instead.

3. Select a node other than the primary node into which to paste the copied node and its subnodes.

4. Click  (Paste).

The DT Builder pastes the node and its subnodes into the selected node and refreshes the Tree pane to display the updated structure.

5. Click  (Save).

The DT Builder saves your changes.

## Copy and Paste a Single Node

To copy a node without its subnodes or responses, follow these steps:

1. Select the node to copy in the Tree pane.

**Note:** You cannot copy the primary node.

2. Select Copy Single Node from the Edit menu.

The DT Builder puts a copy of the selected node in memory. The node remains in memory until you cut or copy another item.

**Note:** This action does not remove the selected node or its subnodes from the knowledge tree. To remove the selected node and its subnodes from the knowledge tree and put it in memory, use the Cut action instead.

3. Select a node other than the primary node into which to past the copied node.

4. Click  (Paste).

The DT Builder pastes the node into the selected node and refreshes the Tree pane to display the updated structure.

5. Click  (Save).

The DT Builder saves your changes.

## Cut and Paste a Node and Its Subnodes

To cut a node and its subnodes, follow these steps:

1. Select the node to cut in the Tree pane.

**Note:** You cannot cut the primary or root node.

2. Click  (Cut).

The DT Builder highlights the selected node and puts it and its subnodes in memory. The node and its subnodes remain in memory until you cut or copy another item.

**Note:** This action removes the selected node and its subnodes from the knowledge tree. To put a copy of a node in memory without removing it from the knowledge tree, use the Copy action or the Copy Single Node action instead.

3. Select a node other than the primary node into which to past the cut node and its subnodes.

4. Click  (Paste).

The DT Builder pastes the node and its subnodes into the selected node and refreshes the Tree pane to display the updated structure.

5. Click  (Save).

The DT Builder saves your changes.

## Create a Knowledge Tree Document

To create a knowledge tree document, follow these steps:

1. Right-click the category or subcategory in which to add the new document in the Knowledge Categories pane on the Administration tab, then select Create Knowledge Tree Document from the shortcut menu.

**Note:** You cannot create a document directly under the TOP category. If necessary, add a new category in which to create the document.

The Create New Document window opens.

2. Complete the fields on the Content tab as appropriate.
3. (Optional) Click Spell Check to check spelling in the content you entered.
4. Click Save.

The Create New Document window closes and the Update Knowledge Document window opens.

5. Click Design Tree.

The DT Builder opens. The Tree pane displays the information you entered in the Title box in the Create New Document window as the primary node (denoted by ). An initial query node (denoted by ) labeled "Default Node Name" and called the *root node*, is nested below the primary node. The primary node is selected, and the Tree Description (HTML) pane displays on the right side of the DT Builder window.

6. Add the tree description (see page **Error! Bookmark not defined.**) in the Tree Description (HTML) pane.
7. Right-click the root node in the Tree pane, then select Rename from the shortcut menu.

The Prompt window opens.

8. Enter a new name for the root node in the Please Enter the New Node Name box, then click OK.

The Prompt window closes and the Tree pane refreshes to reflect your changes.

9. Select the root node in the Tree pane.

The Query Text (HTML) pane opens.

10. Add the displayed text (see page **Error! Bookmark not defined.**) for the node in the Query Text (HTML) pane.

11. Do one of the following:
  - Add a query node (see page **Error! Bookmark not defined.**). Use a query node to supply a possible answer to the question posed in its parent node and to serve as a parent node for further subnodes in the tree. The query text typically contains a question (the answer to which determines the next node in the tree) or a step in a procedure. Query nodes can have conclusion nodes, jump nodes, and other query nodes as subnodes.
  - Add a conclusion node (see page **Error! Bookmark not defined.**). Use a conclusion node to describe the resolution for a particular problem, the final step in a procedure, or a possible termination point in a query. Conclusion nodes do not have subnodes. You would not typically nest a conclusion node immediately beneath the root node of a knowledge tree.
  - Add a jump node (see page **Error! Bookmark not defined.**). Use a jump node to link to previously defined nodes in the knowledge tree. For example, if the answer to the query posed in a parent node requires repetition of previous steps in a procedure. Jump nodes do not have subnodes. You would not typically nest a jump node immediately beneath the root node of a knowledge tree.
12. Add query, conclusion, and jump nodes as necessary until the knowledge tree is complete.
13. (Optional) Check for errors (see page **Error! Bookmark not defined.**) in your tree design.
14. Click . The DT Builder saves your changes and closes.
15. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.
16. Complete the fields on the remaining tabs on the Update Knowledge Document window as appropriate.
17. Click Save when you finish editing the document.
18. Do one of the following:
  - Click Forward to advance the document to the next approval process task.
  - Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
  - Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

## Delete a Node and Its Subnodes

To delete a node and its subnodes, follow these steps:

1. Select the node to delete in the Tree pane.

**Note:** You cannot delete the primary node.

2. Click  (Delete).

The DT Builder prompts you to confirm deletion of the selected node and its subnodes.

**Note:** By Default, the DT Builder prompts you to confirm node deletion. To disable confirmation, Select the Prompt on Node Delete command on the Options menu to remove the check mark from it.

3. Click OK.

The confirmation message closes and the DT Builder removes the selected node and its subnodes from the knowledge tree. If you selected the root node, the Delete action removes the root node's displayed text and all subnodes but does not remove the root node itself.

## Exit the DT Builder

To exit the DT Builder, follow these steps:

1. Select Exit from the Tree menu.

The DT Builder prompts you to save any unsaved changes.

2. Click Yes
3. The product saves your changes, closes the prompt, and closes the DT Builder.

## Link a Jump Node

After you add a jump node to a knowledge tree, you must link it to a destination query or conclusion node. To link a jump node, follow these steps:

1. Right-click the jump node in the Tree pane, then select Link Jump Node from the shortcut menu.
2. Select the query or conclusion node to which to link the jump node in the Tree pane.

The jump node's name in the Tree pane changes to include the name of the linked query or conclusion node. For example, if you linked a node called "Wednesday", the jump node name changes to "NODE: Wednesday." When a user selects the jump node in the knowledge tree at runtime, the linked query or conclusion node displays.

3. Click  (Save).

The DT Builder saves your changes.

## Paste a Node and Its Subnodes

To paste a node that you previously cut or copied into memory, follow these steps:

1. Select the query node (denoted by ) into which to paste the cut or copied node in the Tree pane.

**Note:** You can only paste a node into a query node. You cannot paste into the primary node (denoted by ).

2. Click  (Paste).

The DT Builder pastes the node (and, if appropriate, its subnodes) to the selected node in the Tree pane.

3. Click  (Save).

The DT Builder saves your changes.

## Preview the Node Design

You can preview a tree description, query node, or conclusion node as it will display to users at runtime. Use this feature to verify your node content and design.

To preview a node, follow these steps:

1. Click the node to preview in the Tree pane.

**Note:** To preview the tree description, click the primary node (denoted by ).

The Tree Description (HTML) pane, Query Text (HTML) pane, or Conclusion Text (HTML) pane opens, as appropriate.

2. Select the Quick View option.

The displayed text for the node appears in a read-only WYSIWYG format.

**Note:** Response links and other features of the node do not function when displayed in Quick View mode.

3. Select the HTML Source option to edit the displayed text.

## Rename a Node

**Note:** By default, the response text you enter replaces the node name in the Tree pane (that is, the DT Builder synchronizes the response text and the node name). To disable synchronization, select the Copy Response command from the Options menu to clear the check mark from it.

To rename a node, follow these steps:

1. Right-click the node to rename in the Tree pane, then select Rename from the shortcut menu.

The Prompt window opens.

Select the current node name in the Prompt window.

2. Enter a new name for the node.
3. Click OK.

The Prompt window closes and the Tree pane refreshes to display the updated node name.

## Save a Knowledge Tree

To save changes to the open knowledge tree, do one of the following:

- Click .

The DT Builder saves all changes to the knowledge tree since you last saved. The DT Builder window remains open.

- Click .

The DT Builder saves all changes to the knowledge tree since you last saved, then closes the DT Builder window.

## Set DT Builder Options

Use the commands on the Options menu to control certain DT Builder behaviors, as follows:

- To set whether the DT Builder uses response text as the name of an associated node, select Copy Response from the Options menu.
  - If a check mark displays next to the command on the menu, the option is active and the response text you specify for a node replaces its name in the Tree pane. This is the default setting.
  - If no check mark displays, the option is inactive and you must manually rename the node.
- To set whether the DT Builder prompts you before deleting a node, Select Prompt on Node Delete from the Options menu.
  - If a check mark displays next to the command on the menu, the option is active and the DT Builder displays a confirmation prompt when you attempt to delete a node. Click OK to close the prompt and delete the node and its subnodes. This is the default setting.
  - If no check mark displays, the option is inactive and the DT Builder deletes the selected node and its subnodes without displaying a confirmation prompt.



# Chapter 6: Administration Tab

---

Knowledge managers and system administrators can use the Administrator tab of Knowledge Tools to perform administrative tasks such as:

- Maintaining approval process settings and templates
- Managing document templates and settings
- Managing search settings

To access the administrative functions of Knowledge Tools, you must log in as a system administrator. All administrative functions can be accessed from the Administration tab.

## Approval Process Manager

The Approval Process Manager allows you to manage the approval process settings and templates. The following panes are available:

- Approval Process Settings Pane (see page 85)
- Approval Process Template List Pane (see page 87)
- Status List pane (see page 100)

## Approval Process Settings Pane

The Approval Process Settings pane opens when you select Administration, Knowledge, Approval Process Manager, Approval Process Settings from the left pane of the Administration tab.

Use the Approval Process Settings pane to specify permissions for editing documents during the approval process and after publishing.

This pane contains the following fields:

### **Permissions for Document Edit during Approval Process**

Specifies who may edit documents before they are published. Select one of the following options:

#### **Documents may be edited by a task assignee, an owner or users with the appropriate Access Type views**

Select this option so only the following contacts can edit a document:

- A contact assigned the current task

- A contact specified as an owner of the document for the current task
- A knowledge manager
- A system administrator

**Documents may be edited by users with full permissions**

Select this option so any user with write permissions to the document can edit it.

**Default:** Documents may be edited by users with full permissions.

**Permissions for Document Edit after Publish**

Specifies who may edit documents after they are published. Select one of the following options:

**User with full permissions may edit documents after they have been published**

Select this option so any user with write permissions to the document can edit it.

**Documents must be unpublished before editing is allowed**

Select this option to require a user to unpublish a document before editing it.

**Default:** Documents must be unpublished before editing is allowed.

This pane contains the following buttons:

**Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

**Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Approval Process Template List Pane

The Approval Process Template List pane opens when you select Administration, Knowledge, Approval Process Manager, Approval Process Templates from the left pane of the Administration tab.

An approval process template groups tasks or steps to complete during the life of a document.

Use the Approval Process Template List pane to add, edit, rename, or delete approval process templates and to designate an approval process template as the default template to use for new documents. When you edit an approval process template, you can add, modify, or delete tasks in the approval process. A default approval process template, Built In Workflow, installs with the product.

**Note:** You cannot delete the Built In Workflow template.

This pane contains the following columns:

### Template Name

Lists approval process templates currently defined in the product. Select a template name to open the Update Approval Process Template dialog. Right-click a template name to open the Approval Process Template shortcut menu, which contains commands for working with the selected template.

### Description

Displays the description defined for each approval process template, if available. Right-click a description to open the Approval Process Template shortcut menu, which contains commands for working with the selected template.

### Default

Displays a mark denoting the approval process template that the product uses by default for newly-created documents or when a document's specified template is deleted. To set an approval process template as the default, right-click the template name or description and select Set as Default from the shortcut menu.

This pane contains the following fields:

### Template

Defines the name of the template for which to search. This field only displays when you click Show Filter.

### Additional Search Arguments

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

This pane contains the following buttons:

**Clear Filter**

Returns all filter fields on the pane or window to their default values.

**Create New**

Opens the Create New Approval Process Template window, on which you can define the name and description for a new template.

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Show Filter/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

## Approval Process Template Detail window

The Approval Process Template Detail window opens when you do any of the following:

- Click a template name in the Approval Process Template List pane
- Right-click a template name in the Approval Process Template List pane and select View from the shortcut menu
- Click Save on the Create New Approval Process Template window
- Click Save on the Update Approval Process Template window
- Click Cancel on the Update Approval Process Template window

Use the Approval Process Template Detail window to review the name and description of the template and the tasks in the approval process, to add, edit and delete tasks, and to specify which task to assign to a document if it is unpublished or unretired. The tasks listed on the Approval Process Template Detail window define the life cycle of documents created with the associated template.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following columns:

**Task Name**

Lists approval process tasks currently defined in the template. Select a task name to open the Task Detail window. Right-click a task name to open the Approval Process Task Name shortcut menu, which contains commands for working with the selected task.

**Status**

Displays the document status associated with the task.

**Assignee**

Displays the user name of the task's owner. A document may have a different owner during each stage of the approval process, and may have one owner who is primarily responsible for maintaining the document after it is published.

**Note:** Analysts with write access to a document can modify the document even if they do not own it.

**Unpublish Task**

Displays a mark to indicate the approval process task to which the product assigns a document when a non-administrative user unpublishes it. Administrators can assign a task directly when unpublishing a document. To set the unpublish task, right-click the task name and select Set Unpublish Task from the shortcut menu.

**Unretire Task**

Displays a mark to indicate the approval process task to which the product assigns a document when a non-administrative user unretires it. Administrators can assign a task directly when unretiring a document. To set the unretire task, right-click the task name and select Set Unretire Task from the shortcut menu.

This window contains the following fields:

**Template**

Displays the unique name associated with the template. This field is read-only.

**Description**

Displays the description defined for the item, if available. This field is read-only.

This window contains the following buttons:

**Edit**

Opens the Update Approval Process Template window so you can modify the template name and description and work with approval process tasks.

### **Publish After Unretiring**

Sets the status of a document associated with the current approval process template to Published when the document is unretired.

### **Retire After Unpublishing**

Sets the status of a document associated with the current approval process template to Retired when the document is unpublished.

## **Assignee Detail window**

The Assignee Detail window opens when you do any of the following:

- Click Save on the Create New Assignee window
- Click Save on the Update Assignee window
- Click Cancel on the Update Assignee window

Use the Assignee Detail window to review the user you selected as an alternate owner for a task.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Assignee**

Displays the contact's name, in "last name, first name" format. Click the user name to open the Detail window for the assignee. This field is read-only.

This window contains the following button:

### **Edit**

Opens the Update Assignee window so you can change the contact assigned as alternate owner for an approval process task.

## Create New Approval Process Template window

The Create New Approval Process Template window opens when you do either of the following:

- Click Create New in the Approval Process Template List pane
- Right-click a template name in the Approval Process Template List pane, then select Save As from the shortcut menu

Use the Create New Approval Process Template window to define the name and description for a template.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Template**

Defines a unique name for the template. This field is required.

### **Description**

Defines a brief description of the item.

This window contains the following buttons:

### **Edit**

Opens the Update Task window so you can modify the Template and Description.

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves and applies the specified settings, closes the current window, and opens the Approval Process Template Detail window.

## Create New Assignee window

The Create New Assignee window opens when you do any of the following:

- Click Add Assignee on the Update Task window
- Click Add Assignee on the Task Detail window
- Right-click an assignee name in the Alternate Assignee List on the Update Task window and select New from the shortcut menu
- Right-click an assignee name in the Alternate Assignee List on the Task Detail window and select New from the shortcut menu

Use the Create New Assignee window to define an alternate user to whom to assign a task when the primary assignee is unavailable or if multiple assignees are necessary.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### Assignee

Defines the contact to whom to assign a task. Do one of the following:

- Enter the name of the contact in "last name, first name" format.
- Click  to open the Contact Search window so you can search for and select a contact.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Assignee box.

This field is required.

This window contains the following buttons:

### Cancel

Discards changes and opens view mode.

### Reset

Returns all fields on the window or dialog to their default values.

### Save

Saves and applies the specified settings, closes the current window, and opens the Assignee Detail window.

## Create New Task window

The Create New Task window opens when you do one of the following:

- Right-click a task name on the Approval Process Template Detail window and select New from the shortcut menu.
- Right-click a task name on the Update Approval Process Template window and select New from the shortcut menu.

Use the Create New Task window to add a new task to the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Task**

Defines a unique name for the task. This field is required.

### **Assignee**

Defines the contact to whom to assign a task. Do one of the following:

- Enter the name of the contact in "last name, first name" format.
- Click  to open the Contact Search window so you can search for and select a contact.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Assignee box.

This field is required.

### **Status**

Specifies the document status to associate with the task. You can select the predefined Draft status or a user-defined status from the drop-down list. This field is required.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves and applies the specified settings, closes the current window, and opens the Task Detail window.

## **Task Detail window**

The Task Detail window opens when you do either of the following:

- Select an existing task on the Approval Process Template Detail window
- Click Save on the Create New Task window
- Click Save on the Update Task window

Use the Task Detail window to review the attributes set for an approval process task and to manage alternate assignees for the task.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Task**

Displays the name of the task. This field is read-only.

### **Assignee**

Displays the contact's name, in "last name, first name" format. Click the user name to open the Detail window for the assignee. This field is read-only.

### **Status**

Displays the document status associated with the task. This field is read-only.

### **Alternate Assignee List**

Defines additional users or groups as owners of a task. You can specify multiple groups or users for each task, and you can also delete users or groups from the list.

When you click Add Assignee, the Create New Assignee window opens so you can define or select contacts to add to the Alternate Assignee List.

When you right-click an assignee name, a shortcut menu opens from which you can select commands to create, edit, review, or delete assignees.

This window contains the following buttons:

**Add Assignee**

Opens the Create New Assignee window, on which you can define an alternate user to whom to assign the task when the primary assignee is unavailable or if multiple assignees are necessary.

**Edit**

Opens the Update Task window so you can modify the Template and Description.

## Task List

The Task List, which is a portion of the Template Detail window, opens when you do either of the following:

- Click Edit on the Approval Process Template Detail window
- Right-click a template name in the Approval Process Template List pane and select Edit from the shortcut menu

Use the Task List window to edit the name and description for a template; to review the tasks in the approval process; to add, edit and delete tasks; and to specify which task to assign to a document when it is unpublished or unretired. The tasks listed on the Task List window define the life cycle of documents created with the associated template.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following columns:

**Task Name**

Lists approval process tasks currently defined in the template. Select a task name to open the Task Detail window. Right-click a task name to open the Approval Process Task Name shortcut menu, which contains commands for working with the selected task.

**Status**

Displays the document status associated with the task.

**Assignee**

Displays the user name of the task's owner. A document may have a different owner during each stage of the approval process, and may have one owner who is primarily responsible for maintaining the document after it is published.

**Note:** Analysts with write access to a document can modify the document even if they do not own it.

### **Unpublish Task**

Displays a mark to indicate the approval process task to which the product assigns a document when a non-administrative user unpublishes it. Administrators can assign a task directly when unpublishing a document. To set the unpublish task, right-click the task name and select Set Unpublish Task from the shortcut menu.

### **Unretire Task**

Displays a mark to indicate the approval process task to which the product assigns a document when a non-administrative user unretires it. Administrators can assign a task directly when unretiring a document. To set the unretire task, right-click the task name and select Set Unretire Task from the shortcut menu.

This window contains the following fields:

#### **Template**

Defines a unique name for the template. This field is required.

#### **Description**

Defines a brief description of the item.

This window contains the following buttons:

#### **Cancel**

Discards changes, closes the current window or dialog, and opens the Approval Process Template Detail window.

#### **Publish after Unretiring**

Sets the status of a document associated with the current approval process template to Published when the document is unretired.

#### **Reset**

Returns all fields on the window or dialog to their default values.

#### **Retire after Unpublishing**

Sets the status of a document associated with the current approval process template to Retired when the document is unpublished.

#### **Save**

Saves and applies the specified settings, closes the current window, and opens the Approval Process Template Detail window.

## Update Assignee window

The Update Assignee window opens when you do any of the following:

- Click Edit on the Assignee Detail window
- Right-click an assignee name in the Alternate Assignee List on the Update Task window and select Edit from the shortcut menu
- Right-click an assignee name in the Alternate Assignee List on the Task Detail window and select Edit from the shortcut menu

Use the Update Assignee window to change the contact assigned as alternate owner for an approval process task.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### Assignee

Defines the contact to whom to assign a task. Do one of the following:

- Enter the name of the contact in "last name, first name" format.
- Click  to open the Contact Search window so you can search for and select a contact.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Assignee box.

This field is required.

This window contains the following buttons:

### Cancel

Discards changes, closes the current window or dialog, and opens the Assignee Detail window.

### Reset

Returns all fields on the window or dialog to their default values.

### Save

Saves and applies the specified settings, closes the current window, and opens the Assignee Detail window.

## Task Windows

Task windows open when you do any of the following:

- Click on a task name from the Task List on the Built in Approval Process Approval Process Template Detail window
- Right-click a task name from the Task List on the Built in Approval Process Approval Process Template Detail window and select View
- Click the Insert Task button from the Task List on the Built in Approval Process Approval Process Template Detail window
- Right-click a task name from the Task List on the Built in Approval Process Approval Process Template Detail window and select Edit
- Right-click a task name from the Task List on the Built in Approval Process Approval Process Template Detail window and select Insert
- Click the Edit button from the Create Document Task Detail window
- Click Save on the Create New Task window
- Click Save on the Create Document Update Task window

Use the Create Document Task Detail window to review the attributes set for an approval process task and to manage alternate assignees for the task.

Use the Create New Task window to add a new task to the approval process.

Use the Create Document Update Task window to change the name and (for user-defined tasks) the status, assignee, and alternate assignees for the selected task.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

These windows contain all or some of the following fields:

### **Task**

Defines a unique name for the task. This field is read-only if viewing the task, and is required when creating a new task.

### **Assignee**

Defines the name of the contact for the assigned task. When viewing a task, this field is read-only and displays the contact's name, in "last name, first name" format. Click the user name to open the detail window for the assignee.

When creating or updating a task, do one of the following:

- Enter the name of the contact in "last name, first name" format.

- Click  to open the Contact Search window so you can search for and select a contact.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Assignee box.

This field is required when creating or updating a task.

### Status

Specifies the document status to associate with the task. When viewing a task, this field is read-only. When creating or updating a task, you can select the predefined Draft status or a user-defined status from the drop-down list.

### Alternate Assignee List

Defines additional users or groups as owners of a task. You can specify multiple groups or users for each task, and you can also delete users or groups from the list.

When you click Add Assignee, the Create New Assignee window opens so you can define or select contacts to add to the Alternate Assignee List.

When you right-click an assignee name, a shortcut menu opens from which you can select commands to create, edit, review, or delete assignees.

**Note:** The Assignee, Alternate Assignee List, and Status boxes only display on the Create Document Update Task window for user-defined tasks.

This window contains the following buttons:

### Add Assignee

Opens the Create New Assignee window, on which you can define an alternate user to whom to assign the task when the primary assignee is unavailable or if multiple assignees are necessary.

**Note:** The Add Assignee button only displays on the Create Document Update Task window for user-defined tasks.

### Insert Task

Opens the Create New Task window, allowing you to add a new task to the list.

### Cancel

Discards changes, closes the current window or dialog, and opens the Task Detail window.

**Edit**

Opens the Update Task window so you can modify the Template and Description.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves and applies the specified settings, closes the current window, and opens the Task Detail window.

## Status List Pane

The Status List pane opens when you select Administration, Knowledge, Approval Process Manager, Document Statuses from the left pane of the Administration tab.

Use the Status List pane to add and delete user-defined document statuses and modify their names and descriptions. You can also modify the names and descriptions of predefined document statuses.

This pane contains the following columns:

**Status Name**

Displays the available document statuses. The default statuses are:

**Draft**

The document has been created and possibly assigned to an analyst for review and modification, but has not yet been published.

**Published**

The document is available in the knowledge base and users or groups with appropriate permissions can view it.

**Retired**

The document has been removed from the knowledge base, either manually or at its expiration date, and can no longer be viewed.

You can change the names and descriptions of predefined statuses. You can also create, modify, or delete user-defined statuses. You cannot delete the predefined Draft, Published, and Retired statuses.

Select a status name to open the Update Status window. Right-click a status name to open the Status List shortcut menu, which contains commands for editing or deleting the selected status.

**Description**

Displays the description defined for each document status, if available. You can change the descriptions for predefined and user-defined statuses.

This pane contains the following fields:

**Status**

Defines the name of the document status for which to search. This field only displays when you click Show Filter.

**Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

This pane contains the following buttons:

**Clear Filter**

Returns all filter fields on the pane or window to their default values.

**Create New**

Opens the Create New Status window so you can define the name and description for a new user-defined document status.

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Show Filter/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

## Create New Status window

The Create New Status window opens when you click Create New on the Status List pane.

Use the Create New Status dialog to define the name and a brief description for a new document status. The product adds the new status after the selected status on the Status List pane.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Status**

Defines a unique name for the document status. This field is required.

**Description**

Defines a brief description of the document status.

**Limits:** The description can be up to 255 characters in length.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves and applies the specified settings, closes the current window, and opens the Status Detail window.

### Status Detail window

The Status Detail window opens when you do any of the following:

- Click Save on the Create New Status window
- Click Save on the Update Status window
- Click Cancel on the Update Status window

Use the Status Detail window to review the name and description for a document status. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Status**

Displays the unique name defined for the document status.

**Description**

Displays the description defined for the item, if available.

This window contains the following button:

**Edit**

Opens the Update Status window so you can modify the status name and description.

## Update Status window

The Update Status window opens when you do any of the following:

- Select a document status name on the Status List pane
- Right-click a document status name and select Edit from the shortcut menu
- Click Edit on the Status Detail window

Use the Edit Status window to rename a document status or change its description.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### Status

Defines a unique name for the document status. This field is required.

### Description

Defines a brief description of the document status.

**Limits:** The description can be up to 255 characters in length.

This window contains the following buttons:

### Cancel

Discards changes, closes the current window or dialog, and opens the Status Detail window.

### Reset

Returns all fields on the window or dialog to their default values.

### Save

Saves and applies the specified settings, closes the current window, and opens the Status Detail window.

## Documents

The following panes are available for Document management:

- Document Settings Pane (see page 104)
- Document Template List Pane (see page 105)

## Document Settings Pane

The Document Settings pane opens when you select Administration, Knowledge, Documents, Document Settings from the left pane of the Administration tab.

Use the Document Settings page to specify settings related to comments, submitting knowledge, and viewing knowledge tree documents.

This pane contains the following fields:

### **Knowledge Tree Document Viewing**

Specifies the viewing mode in which knowledge tree documents open. Select one of the following options:

#### **Open in Tree Mode**

Opens the knowledge tree directly.

#### **Open in Document Mode**

Opens the knowledge tree document initially. The user must click Display to open the actual knowledge tree.

**Default:** Open in Tree Mode.

### **Comments**

Specifies whether users can submit comments for documents and view document comments. Select one of the following options:

#### **Allow comment submission and comment viewing**

Displays a Comment box on the right side of an open document so users can submit comments for the document. Users can view comments already associated with the open document.

#### **Allow comment submission but not comment viewing**

Displays a Comment box on the right side of an open document so users can submit comments for the document. Users cannot view comments already associated with the open document.

#### **Allow neither comment submission nor comment viewing**

Denies users the ability to submit or view comments. The Comment box does not display in an open document.

**Default:** Allow comment submission and comment viewing.

### **Submit Knowledge**

Defines which repository to upload user-submitted documents.

#### **Submit Knowledge Repository**

The product populates the list with the names of repositories defined on the Attachment Library pane.

**Maximum Characters Allowed in Resolution Field**

Defines the maximum size (in characters) that the Resolution field in a document may contain.

**Limits:** The maximum characters allowed is 256000.

**Default:** 32768.

This pane contains the following buttons:

**Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

**Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Document Template List Pane

The Document Template List pane opens when you select Administration, Knowledge, Documents, Document Templates from the left pane of the Administration tab.

Use the Document Template List pane to create and manage document templates, which specify the content and appearance of documents in the knowledge base.

Two default templates install with the product:

- Built In - Knowledge Document
- Built In - Knowledge Tree

The product uses the default templates when you create knowledge documents and knowledge tree documents unless you create new document templates and associate them with your documents.

This pane contains the following columns:

**Template Name**

Lists document templates currently defined in the product. Select a template name to open the Update Document Template window. Right-click a template name to open the Template Name shortcut menu, which contains commands for working with the selected template.

**Default**

Displays a mark to indicate that a template is used by default for newly-created documents or when a document's specified template is deleted. To set a template as the default, right-click the template name and select Set as Default from the shortcut menu.

**Note:** When you create a new document or delete a template associated with a document, the product associates the default template with it (unless you specify another template on the Attributes tab of the Create New Document window or the Update Knowledge Document window).

This pane contains the following fields:

**Template**

Defines the name of the template for which to search. This field only displays when you click Show Filter.

**Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

This pane contains the following buttons:

**Clear Filter**

Returns all filter fields on the pane or window to their default values.

**Create New**

Opens the Create New Document Template window so you can define a new document template.

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Show Filter/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

## Create New Document Template window

The Create New Document Template window opens when you do any of the following:

- Click Create New on the Document Template List pane
- Right-click a template name on the Document Template List pane and select Save As from the shortcut menu

Use the Create New Document Template window to define the name, attributes, layout, and static content of a new document template.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Template**

Defines a unique name for the template. This field is required.

**Quick View**

Displays content in read-only format as it will display at runtime.

**HTML Source**

Displays HTML source code used to define content. Select this option to make simple changes directly to the HTML code.

**Detail**

Displays the static content that appears in documents created using the current template. If you select the HTML Source option, you can edit HTML code for the body directly in the Body box. If you select the Quick View option, the Body box is read-only and displays the static body content as it appears at runtime.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Edit Detail**

Opens the HTML Editor so you can specify the static content and layout used in documents based on the current document template.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves and applies the specified settings, closes the current window, and opens the Document Template Detail window.

**Spelling**

Checks the content in the pane for spelling accuracy. If the content contains spelling errors (that is, words that do not exist in the product dictionary), the Spell Check Results window opens. The Spelling button is only available when the HTML Source option is selected.

## Document Template Detail window

The Document Template Detail window opens when you do any of the following:

- Click Save on the Create New Document Template window
- Click Save on the Update Document Template window
- Click Cancel on the Update Document Template window
- Right-click a template name on the Document Template List pane and select View from the shortcut menu

Use the Document Template Detail window to review the name, layout, and content of the selected template. You cannot change the settings on the Document Template Detail window. To modify the template, click Edit.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Template**

Displays the unique name associated with the template. This field is read-only.

### **Detail**

Displays the static content that appears in documents created using the template. This field is read-only.

This window contains the following button:

### **Edit**

Opens the Update Document Template window so you can modify the selected template. By modifying the document template, you can change the layout and default content of documents that use the template.

---

## Preview Window (User View)

The Preview window opens when you do either of the following:

- Click User View on the Update Knowledge Document window
- Click User View on the Knowledge Document Detail window
- Right-click a Document in the Document List in the Knowledge Categories window under the Administration tab, and select User View

Use the Preview window to view the current document as it will display to users at runtime. This enables you to verify your design before you publish the document. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Use the Print command in the Page Options menu on the upper right side of the Preview window to opens a standard Windows Print dialog so you can specify options for printing the contents of the current document.

The Spell Check Results window opens when you check spelling or click the Spelling button. The spell checker scans the header or body information and displays each unrecognized word in the Spell Check Results window. Use the window to specify what action to take on such words. When you correct or otherwise act upon a word, the product moves to the next unrecognized word, and so on until it has scanned the entire header or body.

You can use the Spell Check Results window to do the following:

- Correct the spelling of a specific occurrence of the unrecognized word in the template header or body
- Correct the spelling of all occurrences of the unrecognized word in the template header or body
- Select a word to replace the unrecognized word
- Ignore a specific occurrence of the unrecognized word in the template header or body
- Ignore all occurrences of the unrecognized word in the template header or body

This window contains the following fields:

### **Not in Dictionary**

Displays the word that the product has identified as misspelled (that is, not in the product dictionary).

**Limits:** This field is read-only.

### **Change To**

Displays the word in the product dictionary that is the closest in spelling to the unrecognized word or the current selection from the Suggestions list.

You can accept the spelling of the replacement as presented or type an alternate spelling in the Change To box, then do one of the following:

- Click **Change**. The product changes the current occurrence of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.
- Click **Change All**. The product changes all occurrences of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.

### **Suggestions**

Specifies words that are close in spelling to the unrecognized word. When you select a word from the list, it displays in the Change To box.

### **Context**

Displays the unrecognized word in the context in which it is used in the template.

Editing the text in the Context box has no effect on the template's contents.

This window contains the following buttons:

### **Change**

Changes the current occurrence of the word in the Not in Dictionary field to the word in the Change To box.

### **Change All**

Changes all instances of the word in the Not in Dictionary field to the word in the Change To box.

### **Close**

Closes the document, window, or dialog.

### **Ignore**

Disregards the current instance of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

### **Ignore All**

Disregards all instances of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

---

## Update Document Template window

The Update Document Template window opens when you do any of the following:

- Select a template name on the Document Template List pane
- Right-click a template name on the Document Template List pane and select Edit from the shortcut menu
- Click the Edit button on the Document Template Detail window

Use the Update Document Template window to change the name, layout, and content of the selected template. By modifying a document template, you can change the layout and default content of documents that use the template.

This window contains the following fields:

### Template

Defines a unique name for the template. This field is required.

### HTML Source

Displays HTML source code used to define content. Select this option to make simple changes directly to the HTML code.

### Quick View

Displays content in read-only format as it will display at runtime.

### Detail

Displays the static content that appears in documents created using the current template. If you select the HTML Source option, you can edit HTML code for the body directly in the Body box. If you select the Quick View option, the Body box is read-only and displays the static body content as it appears at runtime.

This window contains the following buttons:

### Cancel

Discards changes, closes the current window or dialog, and opens the Document Template Detail window.

### Edit Detail

Opens the HTML Editor so you can specify the static content and layout used in documents based on the current document template.

### Reset

Returns all fields on the window or dialog to their default values.

### Save

Saves and applies the specified settings, closes the current window, and opens the Document Template Detail window.

### Spelling

Checks the content in the pane for spelling accuracy. If the content contains spelling errors (that is, words that do not exist in the product dictionary), the Spell Check Results window opens. The Spelling button is only available when the HTML Source option is selected.

## Knowledge Administration

The following panes are available for Knowledge administration:

- Noise Words List Pane (see page 116)
- Special Terms List Pane (see page 116)
- Synonyms List Pane (see page 120)
- Knowledge Categories Pane (see page 124)

### Noise Words List Pane

The Noise Words List pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, Knowledge Administration, Noise Words (when Unicenter KT is installed)
- Administration, Knowledge, Keyword Administration, Noise Words (when Unicenter KT is not installed)

When you publish a document to the knowledge base, the product parses the information in the Title, Summary, Problem, and Resolution fields of the document into keywords. When a user searches the knowledge base, the product compares keywords from the user's query with the keywords parsed from the knowledge base to produce a result list.

Use the Noise Words List pane to specify words that the product can ignore in documents and queries without affecting search results.

For example, when the product parses documents, it ignores default noise words such as "How," "do," and "I." When a user enters a query such as "How do I contact support?", the product removes these words from the search string before performing the query. This results in a quicker return of more accurate results.

You cannot define a noise word that already exists as a synonym or keyword.

This pane contains the following fields:

**Noise Word**

Defines a noise word for which to search. This field only displays when you click Show Filter.

**Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

**Noise Words List**

Displays words to filter out of search requests. The list displays when you click the Search button. If you entered a word in the Noise Word box, the list only displays the specified word. If you entered nothing in the Noise Word box, the list displays all noise words defined for the product.

This pane contains the following buttons:

**Clear Filter**

Returns all filter fields on the pane or window to their default values.

**Create New**

Opens the Create New Noise Word window so you can define a noise word.

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Show Filter/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

## Create New Noise Word Window

The Create New Noise Word window opens when you click the Create New button on the Noise Words List pane.

Use the Create New Noise Word window to add a new word to the list of words that the product can ignore in documents and queries without affecting search results.

This window contains the following field:

### **Noise Word**

Defines a word to add to or edit in the Noise Words list. This field is required.

**Note:** Allows one-character Noise Words for multi-byte languages like Chinese, Japanese, and Korean.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Adds the noise word to the list, closes the current window, and opens the Noise Word Detail window.

### **Close Window**

Closes the document, window, or dialog.

## Noise Word Detail Window

The Noise Word Detail window opens when you do any of the following:

- Click the Save button on the Create New Noise Word window
- Click the Save button on the Update Noise Word window
- Click the Cancel button on the Update Noise Word window

Use the Noise Word Detail window to review a new noise word or to review changes to an existing word in the list of words that the product can ignore in documents and queries without affecting search results.

This window contains the following field:

### Noise Word

Displays the word just added or updated in the Noise Words list. This field is read-only.

**Note:** Allows one-character Noise Words for multi-byte languages like Chinese, Japanese, and Korean.

This window contains the following buttons:

### Edit

Opens the Update Noise Word window so you can modify a noise word.

### Close Window

Closes the document, window, or dialog.

## Update Noise Word Window

The Update Noise Word window opens when you do any of the following:

- Right-click a noise word in the Noise Words List pane and select Edit from the shortcut menu
- Click the Edit button on the Noise Word Detail window

Use the Update Noise Word window to modify an entry in the list of words that the product can ignore in documents and queries without affecting search results.

This window contains the following field:

### Noise Word

Defines a word to add to or edit in the Noise Words list. This field is required.

**Note:** Allows one-character Noise Words for multi-byte languages like Chinese, Japanese, and Korean.

This window contains the following buttons:

**Cancel**

Discards changes, closes the current window or dialog, and opens the Noise Word Detail window.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Adds the noise word to the list, closes the current window, and opens the Noise Word Detail window.

**Close Window**

Closes the document, window, or dialog.

## Special Terms List Pane

The Special Terms List pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, Knowledge Administration, Special Terms (when Unicenter KT is installed)
- Administration, Knowledge, Keyword Administration, Special Terms (when Unicenter KT is not installed)

When you publish a document to the knowledge base, the product parses the information in the Title, Summary, Problem, and Resolution fields of the document into keywords. When a user searches the knowledge base, the product compares keywords from the user's query with the keywords parsed from the knowledge base to produce a result list.

Use the Special Terms List pane to specify words or phrases that the product should treat as single keywords when parsing documents and queries. For example, you might add words or phrases to the list if users are likely to use them in queries and they contain spaces, hyphens, slashes, and so on (for example, words and phrases such as "automated teller machine", "e-mail", and "tcp/ip").

Create a special term for any complex synonym that you create so that the product processes the synonym as a single entity. Complex synonyms contain multiple words separated by spaces or other delimiters. For example, if you define "Computer Associates" as a synonym for "CA", you should also define "Computer Associates" as a special term.

This pane contains the following fields:

**Special Term**

Defines a special term for which to search. This field only displays when you click Show Filter.

**Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

**Special Terms**

Displays words or phrases containing spaces or characters (such as hyphens, slashes, and so on) that the product should treat as single keywords when parsing queries. If you entered a word in the Special Term box before clicking Search, the list only displays the specified word. If you entered nothing in the Special Term box, the list displays all special terms defined for the product.

This pane contains the following buttons:

**Clear Filter**

Returns all filter fields on the pane or window to their default values.

**Create New**

Opens the Create New Special Term window so you can define a word or phrase to use as a special term.

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Show Filter/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

## Create New Special Term Window

The Create New Special Term window opens when you click the Create New button on the Special Terms List pane.

Use the Create New Special Term window to add a new entry to the list of compound words and phrases that the product should treat as single keywords when parsing queries.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Special Term**

Defines a word or phrase to add or edit in the Special Terms list. This field is required.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Adds the word or phrase to the list, closes the current window, and opens the Special Term Detail window.

## Special Term Detail Window

The Special Term Detail window opens when you do any of the following:

- Click the Save button on the Create New Special Term window
- Click the Save button on the Update Special Term window
- Click the Cancel button on the Update Special Term window

Use the Special Term Detail window to review a new special term or to review changes to an existing special term in the list of compound words and phrases that the product should treat as single keywords when parsing queries.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

**Special Term**

Displays the word or phrase just added or updated in the Special Terms list. This field is read-only.

This window contains the following button:

**Edit**

Opens the Update Special Term window so you can modify a word or phrase defined as a special term.

## Update Special Term Window

The Update Special Term window opens when you do any of the following:

- Click a special term in the Special Terms List pane
- Right-click a word or phrase in the Special Terms List pane and select Edit from the shortcut menu
- Click the Edit button on the Special Term Detail window

Use the Update Special Term window to modify an entry in the list of compound words and phrases that the product should treat as single keywords when parsing queries.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

**Special Term**

Defines a word or phrase to add or edit in the Special Terms list. This field is required.

This window contains the following buttons:

**Cancel**

Discards changes, closes the current window or dialog, and opens the Special Term Detail window.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Adds the word or phrase to the list, closes the current window, and opens the Special Term Detail window.

## Synonyms List Pane

The Synonyms List pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, Knowledge Administration, Synonyms (when Unicenter KT is installed)
- Administration, Knowledge, Keyword Administration, Synonyms (when Unicenter KT is not installed)

When you publish a document to the knowledge base, the product parses the information in the Title, Summary, Problem, and Resolution fields of the document into keywords. When a user searches the knowledge base, the product compares keywords from the user's query with the keywords parsed from the knowledge base to produce a result list.

Synonyms are words or phrases that have the same or nearly the same meaning as the keyword with which they are associated. For example, if a query contains the word "computer" and "PC" is defined as a synonym of "computer", the product returns documents that contain either "computer" or "PC". Use the Synonyms List pane to specify keyword/synonym pairs that the product should use interchangeably when parsing documents and queries. These keyword/synonym pairs can improve search results.

If you define a new complex synonym (that is, a synonym containing multiple words separated by spaces or other delimiters), you should also create an identical special term so that the product can treat the synonym as a single entity. For example, if you define "Computer Associates" as a synonym for "CA", you should also define "Computer Associates" as a special term.

You cannot define a synonym or keyword that already exists as a noise word.

This pane contains the following fields:

### **Keyword**

Defines a keyword for which to search. This field only displays when you click Show Filter.

### **Synonym**

Defines a synonym for which to search. This field only displays when you click Show Filter.

### **Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

**Synonyms List**

Displays keyword/synonym pairs defined in the product. For each keyword displayed in the Keyword column, the Synonym column displays one or more synonyms.

This pane contains the following buttons:

**Clear Filter**

Returns all filter fields on the pane or window to their default values.

**Create New**

Opens the Create New Synonym window so you can define a keyword and a synonym to associate with it.

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Show Filter/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

**Create New Synonym Window**

The Create New Synonym window opens when you click the Create New button on the Synonyms List pane

Use the Create New Synonym window to add a new keyword/synonym pair to the list of words that the product should use interchangeably when parsing documents and queries.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Keyword**

Defines the word with which to associate a synonym. This field is required.

**Synonym**

Defines a word that the product should use interchangeably with the word in the Keyword box when parsing documents or queries. This field is required.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Adds the keyword/synonym pair to the list, closes the current window, and opens the Synonym Detail window.

## Synonym Detail Window

The Synonym Detail window opens when you do any of the following:

- Click the Save button on the Create New Synonym window
- Click the Save button on the Update Synonym window
- Click the Cancel button on the Update Synonym window

Use the Synonym Detail window to review a new keyword/synonym pair or to review changes to an existing keyword/synonym pair in the list of words the product should treat as interchangeable when parsing documents or queries.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Keyword**

Displays the word with which the specified synonym is associated.

**Synonym**

Displays the word that the product will use interchangeably with the specified keyword when parsing documents or queries.

This window contains the following button:

**Edit**

Opens the Update Synonym window so you can modify a keyword or a synonym associated with it.

## Update Synonym Window

The Update Synonym window opens when you do any of the following:

- Click a keyword or synonym on the Synonyms List pane
- Right-click a keyword or synonym in the Synonyms List pane and select Edit from the shortcut menu
- Click the Edit button on the Synonym Detail window

Use the Update Synonym window to modify a keyword/synonym pair in the list of words that the product should use interchangeably when parsing documents and queries.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Keyword**

Defines the word with which to associate a synonym. This field is required.

### **Synonym**

Defines a word that the product should use interchangeably with the word in the Keyword box when parsing documents or queries. This field is required.

This window contains the following buttons:

### **Cancel**

Discards changes, closes the current window or dialog, and opens the Synonym Detail window.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Adds the keyword/synonym pair to the list, closes the current window, and opens the Synonym Detail window.

## Knowledge Categories Pane

The Knowledge Categories pane opens when you select Administration, Knowledge, Knowledge Categories from the left pane of the Administration tab.

Use the Knowledge Categories pane to manage content for each problem-solving model in the knowledge base. From the Knowledge Categories pane, users with system administrator or knowledge manager rights can:

- Create, publish, and maintain knowledge documents and knowledge tree documents
- Manage the knowledge category structure to make document access easier

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

**Note:** The File menu for this window contains additional commands to help you manage document categories.

This pane has the following components:

### Category Pane

The left pane, or Category pane, displays the hierarchical categories in which the documents comprising the knowledge base are stored. Use the Category pane to navigate the knowledge base and to select the category whose documents display in the Knowledge Document List pane.

### Knowledge Search Pane

The Knowledge Search pane at the top of the right pane contains controls with which you can specify criteria for and initiate a basic or advanced search of the knowledge base. Click Advanced Search to display the advanced search fields; click Hide to display only the basic Search box. When you click Search, the Knowledge Document List pane shows the list of documents that match your search criteria.

### Knowledge Document List Pane

The lower right pane, or Knowledge Document List pane, displays the documents that reside in the category selected from the Category pane. Use the Knowledge Document List pane to browse the list of documents in a category and to select documents with which to work. You can use the controls in the Knowledge Search pane above the Knowledge Document List pane to specify criteria by which to determine which documents from the current category display.

**Notes:**

- Right-click a document title in the list to display the Knowledge Document administrative shortcut menu.
- This pane has a vertical split bar that you can drag right or left to adjust the size of the panes.

The left pane, or Category pane, displays the hierarchical categories in which the documents comprising the knowledge base are stored. Use the Category pane to navigate the knowledge base and to select the category whose documents display in the Knowledge Document List pane.

### Category Detail Window

The Category Detail window opens when you do any of the following:

- Click Save on the Create Category window
- Click Save on the Update Category window
- Click Cancel on the Update Category window

Use the Category Detail window to review the title, description, keywords, and permissions defined for a category. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following tabs:

- Content
- Permissions

This window contains the following button:

**Edit**

Opens the Update Category window so you can edit the title, description, keywords, and permissions defined for the category.

## Create Category Window

The Create Category window opens when you do either of the following:

- Select a category in the Knowledge Categories pane, then select Add Category from the File menu
- Right-click a category in the Knowledge Categories pane, then select Add Category from the shortcut menu

Use the Create Category window to define attributes and permissions for a subcategory to add to the category selected in the Category pane.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following tabs:

- Content
- Permissions

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Creates or saves changes to the category, closes the current window, and opens the Category Detail window.

## Create New Comment Window

The Create New Comment window opens when you click Add Comment on the Comments tab on the Create New Document window or the Update Knowledge Document window.

Use the Create New Comment window to enter a brief comment about the document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Comment**

Defines a comment that provides information about the document. This field is required.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves the comment and opens the View Comment window.

## Create New/Update/Detail Document Windows

The Create New, Update, and Detail Document windows open when you do any of the following:

- Right-click a category name in the Category pane of the Knowledge Categories pane on the Knowledge or Administration tab and select Create Knowledge Document or Create Knowledge Tree Document from the shortcut menu
- Right-click a document title in the Knowledge Document List pane of the Knowledge Categories pane on the Knowledge or Administration tab and select Create Knowledge Document or Create Knowledge Tree Document from the shortcut menu
- Select a category in the Category pane of the Knowledge Categories pane on the Knowledge or Administration tab, then select Create Knowledge Document or Create Knowledge Tree Document from the File menu

- Select New Knowledge Document or New Knowledge Tree Document from the File menu on the Knowledge tab (when Unicenter KT is installed) or the Keyword Search tab (when Unicenter KT is not installed).
- Click Save on the Create New Document window
- Right-click a document title in the Knowledge Categories pane on the Knowledge or Administration tab and select Open from the shortcut menu
- Click a document title in the Knowledge Categories pane on the Knowledge or Administration tab
- Right-click a document title in the Knowledge Document List pane on the Keyword Search tab and select Edit from the shortcut menu
- Click Edit from the Knowledge Document window
- Right-click a document title in the Knowledge Document List pane and select Edit from the shortcut menu

Use the Create New Document window to define the initial content of a new knowledge document.

**Important!** Make sure you use significant searchable words when filling in the Title, Summary, Problem and Resolution text fields, not just noise words. If you use only noise words, your document will become inaccessible after it is saved and indexed.

Use the Update Knowledge Document window to update the content, attributes, permissions, category and document relationships, attachments, comments, and notifications for a document and to review the document's history.

**Note:** The Update Knowledge Document window appears as the Detail Document window, without specifically stating the term update. Use the notebook pages to update the document.

These windows include the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

These windows contain one or more of the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments

- Notifications
- History

These windows contain some or all of the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Assign to Category Owner**

This check box lets you indicate whether to assign the new document to a category owner. Click the check box to assign the new document to a category owner, or click again to un-check. This field is enabled on the Create New Document window only.

**Title**

Defines a short, descriptive name for the document. For knowledge tree documents, the value in the Title box also defines the name of the primary node in the knowledge tree.

**Summary**

Defines a summary that briefly describes the problem associated with the document. Use the Problem box to describe the problem in detail.

**Problem**

Defines the full description of the problem associated with the document. NLS search type is based on this field.

**Resolution**

Defines the description of how to resolve the problem. Click Edit Resolution to open the HTML Editor so you can create or update the resolution. This field only displays when you are creating or updating a knowledge document.

### **Quick View**

Specifies to display content in the associated field as it will appear at runtime. This field only displays when you are creating or updating a knowledge document.

### **HTML Source**

Specifies to display content in the associated field as editable HTML source code. Select this option to make simple changes directly to the HTML code. This field only displays when you are creating or updating a knowledge document.

### **Notes**

Defines additional information about the document. The contents of this field are available only to analysts.

Depending on the approval process task with which the document is currently associated, these windows may contain the following buttons:

#### **Edit**

Opens the Create/Update Document window so you can modify document contents and attributes. The edit window will only open if you are a user with write permission to the document. If you do not have write permission to the document, the read-only view window will open instead.

#### **Forward**

Opens the Forward Document window so you can assign the document to the analyst who will complete the next task in the approval process. When you click OK to forward the document, the Forward Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Forward button displays for all approval process tasks except the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

#### **Publish**

Opens the Knowledge Document Detail window and makes the document available for viewing.

**Note:** System administrators can use the Publish button at any time to bypass the approval process and immediately publish a document. Analysts working on a document can use the Publish button if the document is at the last stage of the approval process and ready to be published.

**Reject**

Opens the Reject Document window so you can reject the document, reassigning it to the previous assignee. When you click OK to reject the document, the Reject Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Reject button displays for all approval process tasks except the first (which is, by default, Create Document).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

**Unpublish**

Changes the status of the document from "Published" to draft (or the appropriate custom status), and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

**User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

**Cancel**

Discards changes and opens view mode.

**Design Tree**

Opens the DT Builder so you can create the knowledge tree structure to associate with the document. This button only displays when you are creating or updating a knowledge tree document.

**Edit Resolution**

Opens the HTML Editor so you can use plain text or HTML elements to design a resolution for the problem that the knowledge document addresses. This button only displays when you are creating or updating a knowledge document.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves changes to the current document.

**Note:** The Save button is only available on the Update/Create Document window if you have write access to the document. A document is read-only when it is published (as per Administrative option) or retired, or when the document's permissions preclude you from changing it.

### Spell Check All Fields

Checks the content of the Title, Summary, Problem, Resolution, and Notes fields. If the text of any of the fields contains a spelling error (that is, a word that does not exist in the product dictionary), the Spell Check Results window opens. The window shows the contents of all non-empty fields, separated by headers of the form --TITLE--, --SUMMMARY-- and so on, with the first misspelled word highlighted.

## Date Helper Window

The Date Helper window opens when you click  on a window or dialog on which you must specify a date and time.

Use the Date Helper window to select when an event defined by the window or dialog from which you accessed the Date Help window occurs.

This window contains the following fields:

### Month

Specifies the month during which an event occurs.

**Default:** The month during which the Date Helper window opened.

### Year

Specifies the year during which an event occurs.

**Limits:** The year must be in the range 1994 to 2013.

**Default:** The year during which the Date Helper window opened.

### Calendar

Displays the days of the selected month and year. Click a day to select it.

**Default:** The day during which the Date Helper window opened.

### 24-Hour

Specifies how to display the values in the Hour list.

- Select the 24-Hour check box to display values in the Hour list using 24-hour time format.

**Example:** 15.

Clear the 24-Hour check box to display values in the Hour list using 12-hour time format.

**Example:** 3 pm.

**Default:** The check box is cleared.

**Hour**

Specifies the hour during which an event occurs.

**Default:** The hour during which the Date Helper window opened.

**Minute**

Specifies the minute during which an event occurs.

**Default:** The minute during which the Date Helper window opened.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Next**

Sets the Month value to the month that follows the current selection and refreshes the Calendar control to display the days of the newly selected month.

**OK**

Closes the Date Helper window and sets the value of the field from which you accessed the window to the selected date and time.

**Prev**

Sets the Month value to the month that precedes the current selection and refreshes the Calendar control to display the days of the newly selected month.

## Delete Category window

The Delete Category dialog opens when you do either of the following:

- Select a category in the Knowledge Categories pane, then select Delete Category from the File menu
- Right-click a category in the Knowledge Categories pane, then choose Delete Category from the shortcut menu

Use the Delete Category dialog to specify whether to delete subcategories and documents and to confirm deletion of the selected category.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This dialog contains the following fields:

**Include Subcategories**

Specifies whether the product should delete subcategories of the selected category.

- Select the Include Subcategories check box to delete all subcategories that reside in the selected category. If you also select the Include Documents check box, the product deletes documents that reside in the subcategories.
- Clear the Include Subcategories check box to relocate subcategories from the selected category to its nearest available parent category.

#### **Include Documents**

Specifies whether the product should delete documents when it deletes the selected category.

- Select the Include Documents check box to delete documents that reside in the selected category. When you select the Include Documents check box, the following options display:
  - **Delete documents linked by primary category only**-Select this option to delete only documents for which the selected category is the primary category.
  - **Delete all documents linked to the category**-Select this option to delete all documents in the selected category.

If you also select the Include Subcategories check box, the product deletes documents that reside in subcategories of the selected category, as indicated by the Delete Documents option you selected.

- Clear the Include Documents check box to relocate documents from the selected category to its nearest available parent category.

This dialog contains the following buttons:

#### **Cancel**

Discards changes and opens view mode.

#### **OK**

Closes the Delete Category dialog, removes the selected category from the Category pane and the knowledge base, and moves or deletes subcategories and documents as specified.

## Email Document window

The Email Document window opens when you click Email on the Page Options menu when viewing a document.

Use the Email Document window to email a link to the document or a copy of the document to specified recipients.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### Your Name

Defines the name (in "last name, first name" format) of the user to identify as sender of the email.

**Default:** Your name (as specified to the product).

Your Email

Defines the email address of the email sender.

**Default:** The email address associated with your user account.

### Send To

Defines the email addresses of contacts to whom you want to send the document or link. Enter one or more email addresses, or click  to open the Contact Search window so you can search for and select contacts. Use semicolons (;) to separate multiple email addresses.

### Subject

Defines a subject for the email.

**Default:** The document's type (Knowledge Document or Knowledge Tree Document) and ID.

### Personal Message

Defines a text message to accompany the document or link you are sending.

### Send Document

Specifies how the product should attach the document to your email. Select one of the following options:

#### In HTML

The product inserts the document in the body of the email in HTML format. Recipients can view the document directly in the email.

**Link Only**

The product inserts a URL link in the email. Recipients must click the link to display the document in a web browser.

**Default:** In HTML.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Closes the Email Document window and sends the email to the specified recipients.

**Event for Document view window**

The Event for Document window opens when you right-click an Event on the History tab of the Update Knowledge Document window and select View from the shortcut menu. The fields on this window are read-only.

Use the Event for Document window to view the detail of the selected event.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Event**

Displays the name of the selected event.

**Event Detail**

Displays the detail information for the selected event.

**Time Stamp**

Displays the date and time (in *mm/dd/yyyy hh:mm am/pm* format) at which the selected event occurred.

**Example:** 08/23/2004 04:13 am

## Knowledge Document Window

The Knowledge Document window opens when you do either of the following:

- Click a Knowledge Document icon or title on:
  - The Knowledge Document List on the Knowledge tab.
  - The Knowledge Document List of the Knowledge Documents nodes of the Scoreboard on the Knowledge Tools tab.
- Right-click a knowledge document title in the Knowledge Categories pane on the Administration tab, then select Document View from the shortcut menu
- Right-click a knowledge document title in the Knowledge Document List on the Knowledge tab and select View from the shortcut menu.
- Click a Knowledge Document link, for example, under the Top Solutions section.
- Click a Knowledge Document link, for example, under the Top Solutions section of *Customer or Employee* user interface
- Click a Knowledge Document icon or title in Activities tab of a Request or an Issue of KT Log Solution type
- Click a Knowledge Document icon or title after search on the Knowledge tab of a Request or an Issue

Use the Knowledge Document window to view and interact with a knowledge document.

**Note:** To create a new document or update an existing document, see Create New/Update/Detail Document Windows (see page 127).

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Documents contain a variety of information organized to optimize user access. Documents created using the default Built In - Knowledge Document template are divided into two areas:

- The left side of the document (the document body) contains information about the problem the document addresses, the suggested resolution for the problem, and links to related resources. In addition to the document title, specific information displayed may include the following:

### **Summary**

Displays a brief description of the problem associated with the document.

### **Problem**

Displays the full description of the problem associated with the document.

### **Resolution**

Displays the description of how to resolve the problem.

### **See Also**

Displays links to other documents in the knowledge base that are related to the current document. Click a link under See Also to open the associated document in a new window.

### **Attachments**

Displays links to files attached to the document as supplemental information. When you click a link, the attached file opens in an appropriate application.

### **Related Categories**

Displays links to categories that are related to the document. Click a link under Related Categories to list the documents that reside in the linked category and its subcategories in the Knowledge Document List pane.

### **Related Tickets**

Lists any tickets related to this document.

### **Properties**

Displays the properties specified in the document template. By default, the numeric Document ID and the date on which the document was created are displayed.

### **Comments**

Displays comments added by document users through the Comment box on the document. Each comment displays with the name and email address of the contact who entered it and the date the comment was entered.

- The right side of the document contains menus, page option links, solution survey fields, and comment fields.

### **Page Options**

Displays commands for interacting with the document. Use the Page Options commands to edit, email, bookmark, print, close, and subscribe to the current document. You can also create a new request or create a new request based on the document being viewed, depending on how you accessed this window.

- The Solution Survey and Comments are two boxes that let you rate and comment upon the document:

### **Solution Survey**

Defines feedback regarding the effectiveness of the document in answering your question and lets you open an issue or request. The product uses your feedback to calculate the document's FAQ rating.

**Comment**

Defines comments to add to the document. For example, you might add a comment that clarifies the document's resolution. Comments you add display under the Comments heading in the document body.

**Note:** Documents created using a customized template may contain different information.

**Forward Document window**

The Forward Document window opens when you click Forward on the Update Knowledge Document window.

Use the Forward Document window to move a document to the next stage of the approval process and to assign the document to an analyst for that stage. You can also specify an optional comment for the document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Title**

Displays the title of the document. This field is read-only.

**Next Task**

Displays the approval process task to which the document will be forwarded. This field is read-only.

**Next Status**

Displays the approval process status to which the document will be forwarded. The default statuses are:

**Draft**

The document has been created, and possibly assigned to an analyst for review and modification, but is not currently available in the knowledge base (that is, it is not published).

**Published**

The document is available in the knowledge base and those users or groups with access can view it.

**Retired**

The document has been removed from the knowledge base, either manually or as the result of the expiration date passing, and is no longer available.

This field is read-only.

### **Next Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

### **Comment**

Defines a comment that provides information about the document.

This window contains the following buttons:

#### **Cancel**

Discards changes and opens view mode.

#### **OK**

Prompts you to confirm forwarding the document to the next approval process task. When you click OK, the Forward Document window closes. The forwarded document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

## **Knowledge Document Detail window**

The Knowledge Document Detail window opens when you do any of the following:

- Click Cancel on the Update Knowledge Document window
- Click Publish on the Update Knowledge Document window, then click OK to confirm publishing
- Click OK on the Forward Document window, then click OK to confirm forwarding
- Click OK on the Reject Document window, then click OK to confirm rejection

Use the Knowledge Document Detail window to review the content and attributes defined for a document, to unpublish a document, or to preview a document as users will see it at runtime.

This window contains the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments

- Comments
- Notifications
- History

This window contains the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

This window contains the following buttons:

**Edit**

Opens the Update Knowledge Document window so you can modify document contents and attributes. This command only displays for the document owner, for system administrators, and when the document status is "Unpublished."

**Unpublish**

Changes the status of the document from "Published" to "Unpublished", and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

**User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

## Knowledge Document List Pane

The lower right pane, or Knowledge Document List pane, displays the documents that reside in the category selected from the Category pane. Use the Knowledge Document List pane to browse the list of documents in a category and to select documents with which to work. You can use the controls in the Knowledge Search pane above the Knowledge Document List pane to specify criteria by which to determine which documents from the current category display.

This pane contains the following columns:

### **Title**

Displays the title and summary information defined for each document in the result set. When you click the document title, the document opens in the Update Knowledge Document window. When you right-click the document title, the Knowledge Document List shortcut menu opens.

### **Attributes**

Displays the attributes for each document in the result set. Use the Preferences window to specify which attributes display. By default, the Attributes column includes the Document ID, Owner, Modify Date, and Status attributes.

If the Knowledge Document List pane contains more documents than can display on a single page, you can use the following browse links at the top of the pane to navigate the list:

<<

Displays the first page of documents.

<

Displays the previous page of documents.

>

Displays the next page of documents.

>>

Displays the last page of documents.

### **List All**

Displays all of the documents in a single scrollable list.

An indicator at the top of the Knowledge Document List pane displays your current position and the total number of documents in the list.

The Knowledge Search pane at the top of the right pane contains controls with which you can specify criteria for and initiate a basic or advanced search of the knowledge base. Click Advanced Search to display the advanced search fields; click Hide to display only the basic Search box. When you click Search, the Knowledge Document List pane shows the list of documents that match your search criteria.

Advanced search options allow overriding the Knowledge Search Document Settings on the Preferences window.

This pane contains some or all of the following fields:

**Search**

Enter a space-delimited list of words or a phrase which is used to search for appropriate documents.

**Search Only In *category***

Specifies to search for documents only in the selected category and its subcategories. If you do not want to limit your search to the selected category and its subcategories, select the Search All Categories option instead. This field only displays on the Knowledge tab when you select a category other than TOP from the Category pane.

**Search All Categories**

Specifies to search for documents in all categories and subcategories. If you want to limit your search to the category selected in the Category pane and its subcategories, select the Search Only In *category* option instead. This field only displays on the Knowledge tab when you select a category other than TOP from the Category pane.

**Search In**

Specifies which document fields to search for specified keywords. When you click Search, the product returns only documents that contain the specified keywords in the fields specified by the selected *Search In* check boxes. Select any combination of the following check boxes:

- Problem
- Resolution
- Summary
- Title

These check boxes only display when Keyword Search is the selected search type. If you select Natural Language Search from the Search Type list, the Search In check boxes do not display and the product only searches the Problem fields of documents.

**Default:** All check boxes are selected.

### **Search Type**

Specifies the type of search to perform. Select one of the following options:

#### **Keyword Search**

Select this option to search for the specified keywords in the Title, Summary, Problem, and Resolution fields of documents. Use the Search In check boxes to exclude one or more of these fields.

#### **Natural Language Search**

Select this option to search for the specified text only in the Problem fields. Natural Language Search (NLS) allows you to perform a search using natural language, which compares the pattern of words contained in the query with the patterns of words contained in the Problem field of knowledge base documents.

**Default:** Keyword Search.

### **Match Type**

Specifies the method for text matching during the search. Select one of the following options:

#### **Any of the Words (OR)**

A match occurs when the product finds *any* of the specified words in a document.

#### **All of the Words (AND)**

A match occurs only when the product finds *all* of the specified words in a document.

#### **Exact Match**

A match occurs only when the product finds the exact words or phrase specified in a document.

**Default:** Any of the Words (OR).

### **Match**

Specifies the method by which the product searches documents. Select one of the following options:

#### **Whole words**

The search retrieves only documents that contain the entire words entered.

**Words beginning with...**

The search retrieves documents that contain the entire words entered or words that begin with the words entered. For example, a search for the word "print" also returns documents containing the words "printer" or "printing".

The Match list setting overrides the default set on the Preferences window and is only available when you specify keywords or phrases for which to search.

**Default:** Whole words.

**Order By**

Specifies a criterion by which to sort search results. Select one of the following options:

**Asset**

Sorts documents by the name of an associated asset. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Author**

Sorts documents by author name. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Creation Date**

Sorts documents by the date on which they were created, with the most recently created documents listed first. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Document ID**

Sorts documents by their product-defined ID number. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Document Type**

Sorts documents by their type (knowledge document or knowledge tree document), with knowledge documents listed first. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Expiration Date**

Sorts documents by the date on which they are scheduled to expire, with the nearest expiration dates listed first. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**FAQ Rating**

Sorts documents based on their FAQ rating, which considers how often the document is accessed, how helpful it has been to users, and its age. Documents with the highest FAQ ratings are listed first.

**Hits**

Sorts documents by the number of times users have accessed them, with the most frequently accessed documents listed first. Hits may not be available for all record types. This field only displays for advanced searches on the Knowledge tab.

**Modify Date**

Sorts documents by the date on which they were last modified, with the most recently modified documents listed first.

**Owner**

Sorts documents by owner name. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Product**

Sorts documents by the name of an associated product. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Relevance**

Sorts documents by their relevance to the specified search criteria (expressed as EXCELLENT, GOOD, and so on). Documents with the highest relevance (EXCELLENT) are listed first.

**Solution Count**

Sorts documents by the number of issues or requests they have resolved, as reported by users. Documents with the highest solution counts are listed first. This field only displays for advanced searches on the Knowledge tab.

**Start Date**

Sorts documents by the date on which they become available on the document list window, with the nearest start dates listed first. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Status**

Sorts documents by their current approval process status. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Subject Expert**

Sorts documents by subject expert name. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Summary**

Sorts documents by the content of their summary. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Title**

Sorts documents by title. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Workflow Priority**

Sorts documents by their approval process priority, with the highest priority documents listed first. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

This field only displays when Keyword Search is the selected search type. If you select Natural Language Search from the Search Type list, the Order By list does not display.

**Sort Descending**

Specifies whether to sort retrieved documents in descending order by the attribute selected from the Order By list. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

- Select the check box to sort retrieved documents in descending (Z to A) order.
- Clear the check box to sort retrieved documents in ascending (A to Z) order.
- **Default:** Cleared.

**Search in Child Categories**

Specifies whether to include subcategories when filtering documents. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

- Select the check box to include subcategories of the category selected in the Category pane when searching for documents that match other filter settings.
- Clear the check box to search only in the selected category.

**Status**

Specifies the document status by which to filter documents retrieved. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab. The default statuses are:

**<empty>**

The product returns all documents that match other specified filtering criteria, regardless of approval process status.

**Draft**

The product only returns documents whose approval process status is "Draft".

**Published**

The product only returns documents whose approval process status is "Published".

**Retired**

The product only returns documents whose approval process status is "Retired".

If you create additional document statuses on the Administration tab, the Status list includes them. When you select one of these statuses, the product only returns documents with the selected status when you click Search.

**Default:** <empty>.

**Document Type**

Specifies the type of knowledge documents to retrieve. When you click Search, the product returns only documents of the specified type. Select one of the following options:

**<empty>**

Select this option to return both knowledge documents and knowledge tree documents.

**Document**

Select this option to return only knowledge documents.

**Tree Document**

Select this option to return only knowledge tree documents.

**Default:** <empty>.

**User Defined ID**

Defines a user-defined ID by which to filter documents retrieved.

**Approval Process Priority**

Specifies the approval process priority (Low, Normal, High, or Emergency) by which to filter documents retrieved. When you select no priority (that is, you leave <empty> as the field value), the product does not consider priority when filtering documents. When you click Search, the product returns only documents associated with the specified approval process priority.

**Default:** <empty>.

### Owner

Defines the name of the owner by which to filter documents retrieved. Do one of the following:

- Enter the name of the owner in "last name, first name" format.
- Click  to open the Contact Search window so you can locate and select an owner.
- Enter some or all of the owner name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Owner box.

When you click search, the product returns only documents associated with the specified owner.

### Author

Defines the author name by which to filter documents retrieved. Do one of the following:

- Enter the name of the author in "last name, first name" format.
- Click  to open the Contact Search dialog so you can locate and select an author.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Author box.

When you click Search, the product returns only documents associated with the specified author.

### Subject Expert

Defines the expert by which to filter documents retrieved. Do one of the following:

- Enter the name of the expert in "last name, first name" format.
- Click  to open the Contact Search dialog so you can search for and select an expert.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Subject Expert box.

When you click Search, the product returns only documents associated with the specified subject expert.

### **Priority**

Specifies the priority level (1, 2, 3, 4, 5, or None) by which to filter documents retrieved. When you select no priority (that is, you leave <empty> as the field value), the product does not consider priority when filtering documents. When you click Search, the product returns only documents with the specified priority.

**Default:** <empty>.

### **Severity**

Specifies a severity level (1, 2, 3, 4, or 5) by which to filter documents retrieved. When you select no severity (that is, you leave <empty> as the field value), the product does not consider severity when filtering documents. When you click Search, the product returns only documents associated with the specified severity level.

**Default:** <empty>.

### **Product**

Defines a product by which to filter documents retrieved. Enter the name of the product in the box, or click  to open the Product Search window so you can search for and select one. When you click Search, the product returns only documents associated with the specified product.

### **Asset**

Defines the name of an asset (hardware, software, or service) by which to filter documents retrieved. Enter the name of the asset in the box, or click  to open the Asset Search window so you can search for and select one. When you click Search, the product returns only documents associated with the specified asset.

### **Root Cause**

Defines a root cause (that is, the core reason for opening the ticket) by which to filter documents retrieved. Possible root causes might include Hardware Failure, Software Failure, and Network Cable. Enter the root cause in the box, or click  to open the Root Cause Selection window so you can search for and select one. When you click Search, the product returns only documents associated with the specified root cause.

### **Impact**

Specifies the level of impact (1, 2, 3, 4, 5, or none) by which to filter documents retrieved. When you select no impact (that is, you leave <empty> as the field value), the product does not consider impact when filtering documents. When you click Search, the product returns only documents associated with the specified impact.

**Default:** <empty>.

**Urgency**

Specifies an urgency level (1, 2, 3, 4, or 5) by which to filter documents retrieved. When you select no urgency level (that is, you leave <empty> as the field value), the product does not consider urgency when filtering documents. When you click Search, the product returns only documents associated with the specified urgency level.

**Default:** <empty>.

**Solution Count**

Specifies the number of issues resolved by which to filter documents retrieved. Select a modifier (greater than, less than, or equal to) from the drop-down list, then enter a number in the text box. When you click Search, the product returns only documents with the specified number of issues resolved. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Category**

Defines one or more categories by which to filter documents retrieved. Click  to open the Category Selection window so you can select a category. When you click a category on the Category Selection window, the window closes and the Category box refreshes to display the selected category path. To remove a category from the Category box, select it and click the Remove Category link. To remove all categories from the Category box, click the Clear Categories link. When you click Search, the product returns only documents associated with the selected categories. This field only displays for advanced searches on the Knowledge tab.

**Primary Category**

Defines the primary category by which to filter documents retrieved. Enter the primary category name in the box, or click  to open the Knowledge Category Search window so you can locate and select one. When you click Search, the product returns only documents associated with the specified primary category. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**All Categories**

Defines a comma-delimited list of categories by which to filter documents retrieved. Enter the category names in the box, or click  to open the Knowledge Category Search window so you can locate and select them. When you click Search, the product returns only documents associated with all of the specified categories. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Earliest Creation Date**

Defines the earliest creation date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents created *after* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

#### **Latest Creation Date**

Defines the latest creation date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents created *before* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

#### **Earliest Modify Date**

Defines the earliest modification date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents modified *after* the specified date. This field only displays when you click a More link in the Filter or Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

#### **Latest Modify Date**

Defines the latest modification date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents modified *before* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

#### **Earliest Start Date**

Defines the earliest availability date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents that became available in the knowledge base *after* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Latest Start Date**

Defines the latest availability date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents that became available in the knowledge base *before* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Earliest Expiration Date**

Defines the earliest expiration date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents scheduled for removal from the knowledge base *after* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Latest Expiration Date**

Defines the latest expiration date and time by which to filter documents retrieved. Enter the date and time in *mm/dd/yyyy hh:mm am/pm* format (for example, 07/27/2004 08:15 am), or click  to open the Date Helper window so you can select them. When you click Search, the product returns only documents scheduled for removal from the knowledge base *before* the specified date. This field only displays when you click a More link in the Knowledge Search pane. This field only displays for advanced searches in the Knowledge Categories pane on the Administration tab.

**Title**

Defines a document title by which to filter documents retrieved. When you click Search, the product returns only documents with the specified title. This field only displays when you click a More link in the Knowledge Search pane.

**Summary**

Defines a document summary by which to filter documents retrieved. When you click Search, the product returns only documents with the specified summary. This field only displays when you click a More link in the Knowledge Search pane.

**Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

This pane contains the following buttons:

**Advanced Search**

Expands the Knowledge Search pane to include advanced search fields so you can enter criteria to more precisely define your search. The Hide button replaces the Advanced Search button when the advanced search fields are displayed.

**Hide**

Hides the advanced search fields on the Knowledge Search pane. The Advanced Search button replaces the Hide button when the advanced search fields are hidden.

**Reset Search**

Returns fields on the Knowledge Search pane to their original values (that is, to their values before you made changes).

**Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

**Edit in List**

This button displays the appropriate Update window, allowing you to make changes to the record currently selected in the List window, or all the items in the list if you use the Change All button. Only the fields displayed in the list window may be updated. This feature can be used to make quick changes to the items in the list window.

For example, on the SLA Map List window, you could change all the Service Types for all records in the list using the Change All button.

**Note:** The "Edit in List" button feature for the fields *Owner* and *Assignee* for published documents will give you an error when using the default workflow settings. This is by default, because the *workflow* related fields may not be modified for published documents.

---

## Knowledge Tree Document Window

The Knowledge Tree Document window opens when you do any of the following:

- Right-click a knowledge tree document title in the Knowledge Categories pane, then select Document View from the shortcut menu
- Click a knowledge tree document title in the Knowledge Document List on the Knowledge tab
- Right-click a knowledge tree document title in the Knowledge Document List on the Knowledge tab, then select View from the shortcut menu.

Use the Knowledge Tree Document window to view and interact with a knowledge tree document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Documents contain a variety of information organized to optimize user access. Documents created using the default Built In - Knowledge Tree Document template are divided into three areas:

- The left pane contains a dynamic map of the document. The bottom entry in the map indicates the current location in the document. Use the map in the left pane as necessary to navigate to previously viewed branches of the knowledge tree document.
- The right pane contains the knowledge tree document, a menu, and two boxes that let you rate and comment upon it the document. This pane contains the following components:

### Document View

Displays the document as a knowledge tree. In this mode, the window contains information about the problem the document addresses, the suggested resolution for the problem, and links to related resources. To view the document as a knowledge tree, click the Display button under the Resolution heading.

### Tree Navigation

Provides navigation to nodes in the knowledge tree that you have already viewed. The following links may be available:

- **Tree Description**-Displays a description of the purpose of the knowledge tree document, if one was defined.
- **Start Over**-Returns to the first page of the document.
- **Prev**-Returns to the previous page of the document.

- **Next**-Returns to the next page of the document.
- **Last**-Returns to the last viewed page of the document.

#### **Page Options menu**

Displays commands for interacting with the document. Use the Page Options commands to edit, email, bookmark, print, close, and subscribe to the current document. You can also create a new request or create a new request based on the document being viewed, depending on how you accessed this window.

#### **Solution Survey**

Defines feedback regarding the effectiveness of the document in answering your question and lets you open an issue or request. The product uses your feedback to calculate the document's FAQ rating.

#### **Comment**

Defines comments to add to the document. For example, you might add a comment that clarifies the document's resolution. Comments you add display under the Comments heading in the document body.

**Note:** Documents created using a customized template may contain different information.

## **Preferences Window**

The Preferences Settings window opens when you do either of the following:

- Select Preferences from the View menu
- Click Edit on the Preferences Detail window

Use the Preferences window to set default Knowledge Tools behaviors.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

#### **Avoid Popups**

Specifies whether to reduce the number of new browser windows opened by displaying new forms in the main browser window whenever possible.

- Select the check box to minimize the number of new browser windows opened.
- Clear the check box to open new browser windows according to the properties set in the form definition.

**Default:** Cleared.

**Note:** If this option is selected, the Back to List button will be activated, and can be used to navigate from detail forms back to the previously displayed list window. The Back to List button will appear in the upper right-hand side of the window.

### **Display Score Count**

Specifies whether you want to display the score count left-justified.

**Default:** Cleared.

### **Keep Log Reader Window**

Specifies whether to keep the Log Reader window open when you select the Close All Popups command from the Window menu and after you log off of Knowledge Tools. This setting has no effect when the Log Reader window is not open.

- Select the check box to keep the Log Reader window open.
- Clear the check box to close the Log Reader window when you select the Close All Popups command or log off of Knowledge Tools.

**Default:** Selected.

### **Preserve Popup Size**

Specifies whether to open new popup windows with the same dimensions as the most recently resized popup window.

- Select the check box to use the new dimensions for new popup windows.
- Clear the check box to open new popup windows with default dimensions.

**Default:** Selected.

**Note:** If you set Preserve Popup Size to on (checked), and you maximize a popup window, subsequent popup windows may cover any other Service Desk window you may have open. However, new popup windows will appear slightly off the screen, to the right and lower. This is because there is a 10 pixel (left and top) offset for popups - so that they do not completely overlay the currently displayed window. It is recommended that you do not maximize popup windows when using the Preserve Popup Size option.

### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### Using Screen Reader

Selecting this preference modifies Service Desk behavior for optimal use with a screen reader for blind and limited vision users. You must log off and log back on again after changing this preference. From the Service Desk Help menu, select the item "Screen Reader Usage", for an overview of using Service Desk with a screen reader.

### Search Type

Specifies the default type of search to perform. Select one of the following options:

#### Keyword Search

Select this option to search for the specified keywords in the Title, Summary, Problem, and Resolution fields of documents.

#### Natural Language Search

Select this option to search for the specified keywords in the Problem fields of documents.

The Search Type field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Keyword Search.

### Match Type

Specifies the default method for text matching during a search. Select one of the following options:

#### Any of the Words (OR)

A match occurs if the product finds *any* of the words specified in the Keywords for Advanced Search box in a document.

#### All of the Words (AND)

A match occurs only if the product finds *all* of the words specified in the Keywords for Advanced Search box in a document.

#### Exact Phrase

A match occurs only if the product finds the exact phrase specified in the Keywords for Advanced Search box in a document.

The Match Type field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Any of the Words (OR).

### Match

Specifies the default method by which the product searches documents. Select one of the following options:

**Whole words**

The search retrieves only documents that contain the entire words entered.

**Words beginning with...**

The search retrieves documents that contain the entire words entered or words that begin with the words entered. For example, a search for the word "print" also returns documents containing the words "printer" or "printing".

The Match field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Whole words.

**Order By**

Specifies the default property by which to sort documents retrieved. The Order By field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Relevance.

**Search In**

Specifies which document fields to search for specified keywords. When you click Search, the product returns only documents that contain the specified keywords in the fields specified by the selected *Search In* check boxes. Select any combination of the following check boxes:

- Problem
- Resolution
- Summary
- Title

These check boxes only display when Keyword Search is the selected search type. If you select Natural Language Search from the Search Type list, the Search In check boxes do not display and the product only searches the Problem fields of documents.

**Default:** All check boxes are selected.

**Documents Per Page (Knowledge Document List Settings)**

Specifies the number of documents (25 or 50) to display on each page of the Knowledge Document List pane.

**Default:** 25.

**Show Document List Details**

Specifies whether detailed information displays in the Knowledge Document List pane on the Knowledge tab.

Select the check box to display the following default information:

- Title
- Summary
- Document ID
- Modify Date

Clear the check box to display only the document title.

**Default:** The check box is selected.

#### **Documents Per Page (Knowledge Categories Document List Settings)**

Specifies the number of documents (25 or 50) to display on each page of the Knowledge Document List pane.

**Default:** 25.

#### **Attributes to be shown in list**

Displays two lists with which you can define the properties that display for each document in the Knowledge Document List pane on the Knowledge Categories pane of the Administration tab.

- To display a property in the Knowledge Document List pane, select it from the Available List and use the > (Select Item) button to move it to the Selected list.
- To move all of the properties from the Available list to the Selected list, click >> (Select All Available Items).
- To remove a property from the Knowledge Document List pane, select it from the Selected list and use the < (Remove Item from Selected List) button to move it to the Available list.
- To move all of the the properties from the Selected list to the Available list, click << (Remove All Items from Selected List).

To select multiple items in either the Available or Selected list, hold down the Ctrl key while you click each item you want to select or hold down the Shift key while you click the first and last items in a series.

**Default:** DOC ID, Owner, Assignee, Modify Date, and Document Status display in the Selected list.

**Note:** Choosing attributes different than the Preference default may impact performance. If you believe that extra display columns are needed, contact the system administration and ask them to use the Web Screen Painter utility to modify the default page columns for the Document List form.

#### **Active Zone**

From the drop down list, select the active zone for your Global Knowledge Tools environment, for example, your organization's Intranet.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves and applies the specified settings, closes the current window, and opens the Preferences Detail window (see page 161).

### Preferences Detail window

The Preferences Detail window opens when you click Save or Cancel on the Preferences window.

Use the Preferences Detail window to review default Knowledge Tools behaviors. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Avoid Popups**

When selected, will reduce the number of new browser windows opened by displaying new forms in the main browser window whenever possible.

**Note:** If this option is selected, the Back to List button will be activated, and can be used to navigate from detail forms back to the previously displayed list window. The Back to List button will appear in the upper right-hand side of the window.

**Display Score Count**

Displays the score count as left-justified..

**Keep Log Reader Window**

Displays whether the product will keep the Log Reader window open when you select the Close All Popups command from the Window menu and after you log off of Unicenter SD. This setting has no effect when the Log Reader window is not open.

**Preserve Popup Size**

Displays whether the product will open new popup windows with the same dimensions as the most recently resized popup window.

**Note:** If you set Preserve Popup Size to on (checked), and you maximize a popup window, subsequent popup windows may cover any other Service Desk window you may have open. However, new popup windows will appear slightly off the screen, to the right and lower. This is because there is a 10 pixel (left and top) offset for popups - so that they do not completely overlay the currently displayed window. It is recommended that you do not maximize popup windows when using the Preserve Popup Size option.

### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### **Using Screen Reader**

Selecting this preference modifies Service Desk behavior for optimal use with a screen reader for blind and limited vision users. You must log off and log back on again after changing this preference. From the Service Desk Help menu, select the item "Screen Reader Usage", for an overview of using Service Desk with a screen reader.

### **Search Type**

"Using" indicates the type of search to perform. Select either Keyword Search or Natural Language Search.

### **Match Type**

Displays the default method for text matching during a search. Possible values are Any of the Words (OR), All of the Words (AND), and Exact Phrase.

### **Match**

Displays the default method by which the product searches documents, either Whole Words or Words Beginning With.

### **Order By**

Displays the default property by which the product will sort documents retrieved.

### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### **Search In**

Displays which document fields the product will search for specified keywords. These check boxes only display when Keyword Search is the selected search type.

**Documents Per Page (Knowledge Document List Settings)**

Displays the number of documents (10, 25, or 50) that the product will display on each page of the Knowledge Document List pane.

**Show Document List Details**

Displays whether the Knowledge Document List pane on the Knowledge tab includes detailed information. If the check box is selected, the following default information displays:

- Title
- Summary
- Document ID
- Modify Date

If the check box is cleared, on the document title displays.

**Documents Per Page (Knowledge Categories Document List Settings)**

Displays the number of documents (10, 25, or 50) that the product will display on each page of the Knowledge Document List pane.

**Attributes to be shown in list**

Displays the properties listed for each document in the Knowledge Document List pane of the Knowledge Categories pane on the Administration tab.

**Note:** Choosing attributes different than the Preference default may impact performance. If you believe that extra display columns are needed, contact the system administration and ask them to use the Web Screen Painter utility to modify the default page columns for the Document List form.

**Active Zone**

From the drop down list, select the active zone for your Global Knowledge Tools environment, for example, your organization's Intranet.

This window contains the following buttons:

**Edit**

Opens the Preferences Window (see page 156) so you can modify preferences.

## Preview Window (User View)

The Preview window opens when you do either of the following:

- Click User View on the Update Knowledge Document window
- Click User View on the Knowledge Document Detail window
- Right-click a Document in the Document List in the Knowledge Categories window under the Administration tab, and select User View

Use the Preview window to view the current document as it will display to users at runtime. This enables you to verify your design before you publish the document. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Use the Print command in the Page Options menu on the upper right side of the Preview window to opens a standard Windows Print dialog so you can specify options for printing the contents of the current document.

## Reject Document Window

The Reject Document window opens when you click Reject on the Update Knowledge Document window.

Use the Reject Document window to move a document to a previous approval process task and assign an analyst to the document for that task. When multiple previous tasks exist, system administrators can choose the approval process task to which the document will revert. Assignees without administrator privileges can reject the document back to the previous task in the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

### **Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

**Previous Tasks**

Lists approval process tasks to which the document can revert. This field only displays if the current assignee has administrator privileges and there are multiple previous tasks in the approval process.

For each task, the Previous Tasks list displays the assignee who completed the task and the date on which the document was forwarded. When you click a task name to select the task to which to reject the document, the Reject Document window refreshes so you can specify an assignee and enter a comment.

**Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm rejecting the document to a previous approval process task. When you click OK, the Reject Document window closes and the rejected document appears in the specified assignee's Inbox in the Knowledge Document folder on the Service Desk tab.

The Spell Check Results window opens when you check spelling or click the Spelling button. The spell checker scans the header or body information and displays each unrecognized word in the Spell Check Results window. Use the window to specify what action to take on such words. When you correct or otherwise act upon a word, the product moves to the next unrecognized word, and so on until it has scanned the entire header or body.

You can use the Spell Check Results window to do the following:

- Correct the spelling of a specific occurrence of the unrecognized word in the template header or body
- Correct the spelling of all occurrences of the unrecognized word in the template header or body
- Select a word to replace the unrecognized word
- Ignore a specific occurrence of the unrecognized word in the template header or body
- Ignore all occurrences of the unrecognized word in the template header or body

This window contains the following fields:

**Not in Dictionary**

Displays the word that the product has identified as misspelled (that is, not in the product dictionary).

**Limits:** This field is read-only.

**Change To**

Displays the word in the product dictionary that is the closest in spelling to the unrecognized word or the current selection from the Suggestions list.

You can accept the spelling of the replacement as presented or type an alternate spelling in the Change To box, then do one of the following:

- Click Change. The product changes the current occurrence of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.
- Click Change All. The product changes all occurrences of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.

**Suggestions**

Specifies words that are close in spelling to the unrecognized word. When you select a word from the list, it displays in the Change To box.

**Context**

Displays the unrecognized word in the context in which it is used in the template.

Editing the text in the Context box has no effect on the template's contents.

This window contains the following buttons:

**Change**

Changes the current occurrence of the word in the Not in Dictionary field to the word in the Change To box.

**Change All**

Changes all instances of the word in the Not in Dictionary field to the word in the Change To box.

**Close**

Closes the document, window, or dialog.

**Ignore**

Disregards the current instance of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

**Ignore All**

Disregards all instances of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

## Unpublish Document Window

The Unpublish Document window opens when you do either of the following:

- Click Unpublish on the Update Knowledge Document window
- Click Unpublish on the Knowledge Document Detail window

Use the Unpublish Document window to remove the document from the knowledge base so it is no longer available to users. If you have administrator privileges, you can use the Unpublish Document window to retire the document (that is, remove it from the knowledge base and the approval process) or select the approval process task to which the document will revert. If you do not have administrator privileges, the document reverts to the previous task in the approval process.

This window contains the following fields:

**Title**

Displays the title of the document. This field is read-only.

### **Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

### **Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

### **Previous Tasks**

Lists approval process tasks to which the document can revert. This field only displays if the current assignee has administrator privileges and there are multiple previous tasks in the approval process.

For each task, the Previous Tasks list displays the default assignee for the task. When you click a task name to select the task to which to unpublish the document, the Unpublish Document window refreshes so you can specify an assignee and enter a comment.

### **Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

### **Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm unpublishing the document to a previous approval process task. When you click OK, the Unpublish Document window closes and the unpublished document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

**Retire this Document**

Prompts you to confirm retiring the selected document. When you click OK, the Unpublish Document window closes and the product removes the document from the knowledge base and the approval process.

## Unretire Document Window

The Unretire Document window opens when you click Unretire on the Update Knowledge Document window.

Use the Unretire Document window to return a retired document to the knowledge base and workflow. If you are a system administrator, you can republish the document or (when multiple tasks exist) choose the approval process task to which the document will return. Assignees without administrator privileges can return the document to the previous task in the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Title**

Displays the title of the document. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.

- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

### **Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

### **Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **OK**

Prompts you to confirm unretiring the document to the selected approval process task. When you click OK, the Unretire Document window closes and the document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

### **Publish this Document**

Unretires and publishes the document. When you click Publish this Document, the product prompts you to confirm the action. Click OK to close the message and the Unretire Document window, and republish the document.

## Update Category Window

The Update Category window opens when you do either of the following:

- Select a category from the Knowledge Categories pane, then select Edit Category from the File menu
- Right-click a category in the Knowledge Categories pane, then select Edit Category from the shortcut menu
- Click Edit on the Category Detail window

Use the Update Category window to update attributes and permissions for the category selected in the Category pane.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following tabs:

- Content
- Permissions

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Creates or saves changes to the category, closes the current window, and opens the Category Detail window.

## Update Comment Window

The Update Comment window opens when you do any of the following:

- Click Edit on the View Comment window
- Click a comment on the Comments tab of the Update Knowledge Document window
- Right-click a comment on the Comments tab of the Update Knowledge Document window, then select Edit from the shortcut menu

Use the Update Comment window to edit a comment associated with the current document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Comment**

Defines a comment that provides information about the document. This field is required.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves the comment and opens the View Comment window.

The Update Knowledge Document window opens when you do any of the following:

- Click Save on the Create New Document window
- Right-click a document title in the Knowledge Categories pane on the Administration tab and select Open from the shortcut menu
- Click a document title in the Knowledge Categories pane on the Administration tab
- Right-click a document title in the Knowledge Document List pane on the Keyword Search tab and select Edit from the shortcut menu

Use the Update Knowledge Document window to update the content, attributes, permissions, category and document relationships, attachments, comments, and notifications for a document and to review the document's history.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments
- Notifications
- History

This window contains the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

Depending on the approval process task with which the document is currently associated, this window may contain the following buttons:

**Cancel**

Discards changes, closes the current window, and opens the Knowledge Document Detail window.

### **Forward**

Opens the Forward Document window so you can assign the document to the analyst who will complete the next task in the approval process. When you click OK to forward the document, the Forward Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Forward button displays for all approval process tasks except the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

### **Publish**

Opens the Knowledge Document Detail window and makes the document available for viewing.

**Note:** System administrators can use the Publish button at any time to bypass the approval process and immediately publish a document. Analysts working on a document can use the Publish button if the document is at the last stage of the approval process and ready to be published.

### **Reject**

Opens the Reject Document window so you can reject the document, reassigning it to the previous owner and task. When you click OK to reject the document, the Reject Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Reject button displays for all approval process tasks except the first (which is, by default, Create Document) and the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves changes to the current document and (as appropriate) notifies analysts of the changes.

**Note:** The Save button is only available on the Update/Create Document window if you have write access to the document. A document is read-only when it is published (as per Administrative option) or retired, or when the document's permissions preclude you from changing it.

**Unpublish**

Changes the status of the document from "Published" to "Unpublished", and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

**User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

**View Comment Window**

The Comment for Document Detail window opens when you do any of the following:

- Click Save on the Create New Comment window
- Click Save on the Update Comment window
- Click Cancel on the Update Comment window
- Right-click a comment on the Comments tab of the Update Knowledge Document window and select View from the shortcut menu

Use the View Comment window to review a comment you added or edited for a document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

**Comment**

Displays a comment that provides information about the document you are editing, forwarding, rejecting, publishing, unpublishing, or unretiring. This field is read-only.

This window contains the following buttons:

**Close**

Closes the document, window, or dialog.

**Edit**

Opens the Update Comment window so you can modify the comment.

## Windows window

The Windows window opens when you select List All Windows from the Window menu on the Knowledge tab.

Use the Windows window to view a list of windows that Knowledge Tools currently has open and to navigate directly to a specific open window.

To move focus (that is, navigate) to a specific window, click its name on the Windows window.

This window contains the following buttons:

### **Close Window**

Closes the current window.

### **Refresh**

Updates the list of open windows.

## System Administration

The following panes are available for System Administration:

- FAQ Options pane (see page 179)
- General Settings pane (see page 179)
- Parse Settings pane (see page 180)
- Report Card pane (see page 183)
- Search Options pane (see page 185)

## FAQ Options pane

The FAQ Settings Window opens when you select Administration, Knowledge, Solution Survey, FAQ Settings from the left pane of the Administration tab.

Use the FAQ Settings Window to set parameters by which the product calculates the FAQ rating assigned to each document. The product bases the FAQ rating on the following criteria:

- How frequently the document was accessed in the past
- How helpful the document was to users
- How the document's effectiveness has decreased over time

By default, the document list window displays documents sorted in order of FAQ rating (that is, in order of usefulness). The most useful documents "bubble up" to the top of the document list. Over time, documents tend to move downward in the document list as users learn solutions to the problems.

This pane contains the following fields:

### Last Updated

Specifies whether to run the FAQ Rating Service and displays the date on which FAQ ratings were last updated.

- Select the Run the FAQ Rating Service check box to run the FAQ calculation service using the settings on this window.
- Clear the Run the FAQ Rating Service check box to turn off the FAQ calculation service.

### Schedule

Defines the frequency at which the product updates FAQ ratings. This field contains the following components:

#### Perform the FAQ Calculation Every...

Specifies the time that elapses before the product updates the FAQ rating for documents.

**Default:** 1 day.

From...

Specifies the time of day that the product should begin recalculating FAQ ratings.

**Default:** 00:00 (12:00 A.M.).

To...

Specifies the time of day that the product should stop recalculating FAQ ratings, regardless of whether the calculation is finished.

**Default:** 07:00 (7:00 A.M.).

**Note:** This setting initially takes effect the day after product installation. For example, if you install the product on April 19, 2005, the FAQ server runs for the first time on April 20, 2005.

### **Aging**

Defines the number of times a document's FAQ rating will be recalculated before it reaches 0. Based on the specified value, the document's FAQ rating decreases and eventually becomes 0, at which point it appears at the bottom of the document list (when the list is sorted by FAQ Rating).

**Default:** 180.

**Example:** If the Aging value is 180 for a document with a rating of 4 (very helpful), the document's FAQ rating will be 0 when the product has recalculated the FAQ rating 180 times.

**Note:** By default, the FAQ bubble-up calculation requires bu\_trans data for the last 180 days, where 180 is the aging factor. So, if you change the aging factor for FAQ to more than 365 days, you should extend the archive rules for the bu\_trans table accordingly.

### **Days New**

Specifies the number of days that a newly created or imported document displays in the New Documents folder on the Knowledge tab.

**Default:** 5 days.

### **Rating**

Specifies the default rating (Not Helpful at All, Somewhat Helpful, or Very Helpful) for documents that users have opened but not rated.

**Default:** Somewhat Helpful.

This pane contains the following buttons:

#### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

#### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## General Settings pane

The General Settings pane opens when you select Administration, Knowledge, System Administration, General Settings from the left pane of the Administration tab.

Use the General Settings pane to set the default information to display on the Knowledge tab at logon, the format in which categories display in the Knowledge Categories pane on the Administration tab, and the number of documents to list in the Top Solutions list on the Knowledge Tools home page.

**Important!** It is critical that you set an Assignee to receive document indexing notifications in the Document Indexing Notifications section. An email address must be defined for this assignee on the Contact Notification page to enable email notifications.

General Settings contain the following sections:

### Search Tool Opening Screen

Specifies the information displayed by default on the Knowledge tab. Select one of the following options:

#### Open with FAQ/Search

Displays the Category, Knowledge Search, and Knowledge Document List panes.

#### Open with Knowledge Tree Document ID

Displays the knowledge tree with the document ID specified in the field provided. You can return to the knowledge tree document itself, and then to the Category, Knowledge Search, and Knowledge Document List panes.

**Default:** Open with FAQ/Search.

### Category Viewing

Specifies the format in which document categories display in the Knowledge Categories pane on the Administration tab. Select one of the following options:

#### Display categories in tree view

Presents categories in a hierarchical tree structure in the Knowledge Categories pane. Categories expand to reveal associated subcategories. In this manner, you can view all the categories in the tree simultaneously.

#### Display categories in list view

Presents categories in a list format in the Knowledge Categories pane. When you select a category, its subcategories display in a list. You can view only the current level of categories or subcategories at one time. Use the Up One Level link to return to the previous category level.

**Note:** If you have more than 250 categories under the top category, or under any category, use the *Display Categories in List View* option and not the tree view.

### **Top Solutions**

Specifies the number of documents to list in the Top Solutions list on the Unicenter SD home page.

**Default:** 10.

### **Document Indexing Notifications**

Sets a user to receive email notifications about status or when errors occur with document indexing. The user must have an email address in the `ca_contacts` table to receive these email notifications. Use the Notification Page for the assignee's contact record for setting notification methods.

This pane contains the following buttons:

#### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

#### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## **Parse Settings pane**

The Parse Settings pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, System Administration, Parse Settings (when Unicenter KT is installed)
- Administration, Knowledge, Settings, Parse Settings (when Unicenter KT is not installed)

When you publish a document to the knowledge base, the product parses the information in the Title, Summary, Problem, and Resolution fields of the document into keywords. When a user searches the knowledge base, the product compares keywords from the user's query with the keywords parsed from the knowledge base to produce a result list.

Use the Parse Settings pane to define the settings used to parse documents in the knowledge base.

This pane contains the following fields:

#### **Maximum Search Keywords**

Defines the maximum number of keywords to extract when the product parses the search text.

**Default:** 20

**Note:** The valid range is 1-100, so that a Service Desk Knowledge administrator can change the value within this range, based on search needs and parameters of a specific Knowledge database. Use a lower number of search keywords for faster performance.

### Language

Specifies the language type to use for parse processing. Select one of the following settings:

#### English

Performs certain types of processing specific to the English language (for example, de-pluralizing search terms) during a search, if applicable.

#### Non-English

Performs only non-English specific processing during the search.

**Default:** English.

### Valid Character Range

Defines the range of alphanumeric characters to consider valid when parsing the Title, Summary, Problem, and Resolution fields in a document. The product treats any other characters as separators.

**Note:** When you select Yes from the Recognize Special Terms list, the product does not parse words and phrases defined as special terms.

**Default:** a-z, which indicates that the alphabetic characters *a* through *z* are valid characters for parsing.

### Remove Similar Words

Specifies whether the product should remove structurally similar keywords from the groups used in a search. Select one of the following settings:

#### Yes

Removes structurally similar keywords from the search criteria.

**Note:** When you select Yes, the product also removes similar words when you save or publish the document. This can impact whether a document is searchable if the Remove Similar Words box was set to Yes. The similar word may have not been indexed and used in the later search and retrieval of the document.

#### No

Leaves structurally similar keywords in the search criteria.

**Default:** No.

### **Remove Noise Words**

Specifies whether the product should remove noise words when parsing the Title, Summary, Problem, and Resolution fields in a document. Select one of the following settings:

#### **Yes**

Removes noise words from the search criteria.

#### **No**

Leaves noise words in the search criteria.

**Default:** Yes.

### **Recognize Special Terms**

Specifies whether the product should consider special terms as single entities or as multiple words when parsing the Title, Summary, Problem, and Resolution fields in a document. Select one of the following settings:

#### **Yes**

Processes special terms as single entities in the search criteria.

#### **No**

Processes the words that comprise special terms as separate entities in the search criteria.

**Default:** Yes.

This pane contains the following buttons:

#### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

#### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Report Card pane

The Report Card pane opens when you select Administration, Knowledge, Knowledge Report Card from the left pane of the Administration tab.

The Knowledge Report Card provides feedback to analysts, knowledge engineers, knowledge managers, supervisors, category owners, and system administrators about which knowledge documents are most effective. The information provided can be used in a variety of ways to improve the processes of creating knowledge documents and providing the best support to customers.

Use the Report Card pane to define the schedule at which the product calculates and sends notifications about the Knowledge Report Card and to define the content of Knowledge Report Card notification emails.

This pane contains the following fields:

### **Last Updated**

Displays the date and time on which the Report Card service was last updated. This field is read-only.

### **Report Card Calculation will be Run Every xxx**

Specifies the frequency with which to recalculate the Report Card statistics.

**Default:** Never.

### **Report Card Email Notifications will be Sent Every xxx**

Specifies the frequency with which to send Report Card notifications.

**Default:** Never.

### **Report Card Email Should Display Statistics for the Past xxx**

Specifies the amount of time for which the Report Card notification should contain information. This field is only available when you select a value other than Never from the Report Card Email Notifications will be Sent Every xxx list.

**Default:** 365 days.

### **Start the Report Card Service at hh:mm**

Specifies the time at which to start the Report Card service. This field is only available when you select a value other than Never from the Report Card Calculation will be Run Every xxx list.

**Default:** 03:00.

### **Subject**

Defines a subject for the email.

**Default:** Knowledge Report Card Notification.

### **Body**

Defines the content of the Report Card notification email. The product provides default content for this email that contains placeholders for which data is inserted at runtime. When the HTML Source option is selected, you can edit the text directly in the Body box. Click Edit Body to open the HTML Editor so you can make more complex changes to the email content.

**Important!** If you do edit the Body text, be careful to maintain the code that generates the statistics that appear in the email notification, for example:

<a name=my\_stats/> for the beginning of the user's statistics  
<a name=end\_my\_stats/> for the end of the user's statistics

<a name=org\_stats/> for the beginning of the user's organization statistics  
<a name=end\_org\_stats/> for the end of the user's organization statistics

<a name=overall\_stats/> for the beginning of the all organization statistics  
<a name=end\_overall\_stats/> for the end of the all organization statistics

### **Quick View**

Displays content in read-only format as it will display at runtime.

### **HTML Source**

Displays HTML source code used to define content. Select this option to make simple changes directly to the HTML code.

This pane contains the following buttons:

### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Search Options pane

The Search Options pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, System Administration, Search Options (when Unicenter KT is installed)
- Administration, Knowledge, Settings, Search Options (when Unicenter KT is not installed)

Use the Search Options page to set default search options for use on the Knowledge tab and the Knowledge Search pane.

**Note:** These settings only apply to users who have not specified personal search settings on the Preferences window. Users can specify additional search options in the Knowledge Search pane on the Knowledge tab or in the Knowledge Categories pane on the Administration tab.

This pane contains the following fields:

### Default Search Type

Specifies the default search type for users who have not specified their own default search options. Select one of the following options:

#### Keyword

Bases searches on the presence or absence of keywords in the Title, Summary, Problem, and Resolution fields (or a subset of these, as determined by the values set for other options).

#### NLS

Matches search text submitted by the user against the value of the Problem field of each document. NLS (Natural Language Search) compares word patterns in the search string with word patterns in the Problem fields of potentially related documents and adds the most relevant documents to the result set.

**Note:** When NLS is selected, some other options in the pane will not be available.

**Default:** Keyword.

#### Using

Specifies the default criteria used to perform text matching during searches. Select one of the following options:

#### Any of the words (OR)

Includes a document in the result set when it contains any of the words in the Search box.

### **All of the words (AND)**

Includes a document in the result set only when it contains *all* of the words in the Search box.

**Default:** Any of the words (OR).

### **Allow Search in Resolution Field**

Specifies whether searches may include the Resolution field. This field only displays when the Default Search Type option is set to Keyword.

- Select the check box to give users the option to include the Resolution field in keyword searches.
- **Note:** Including the Resolution field in keyword searches may impact performance because Resolution fields can contain large amounts of text.
- Clear the check box to deny users the option to include the Resolution field in keyword searches.

**Default:** The check box is selected.

### **Default Search Fields**

Specifies which document fields to include by default in keyword searches. Select a check box to include the associated field in default searches. Clear a check box to exclude the associated field from default searches. You can select whether to include the following document fields:

- Title
- Summary
- Problem
- Resolution (only available when the Allow Search in Resolution Field check box is selected)

This field only displays when the Default Search Type option is set to Keyword.

**Default:** All options are selected.

This pane contains the following buttons:

#### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

#### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Service Desk Integration

The following panes are available for Service Desk integration:

- Field Mapping pane (see page 187)
- Issue Search Configuration pane (see page 190)
- Request Search Configuration pane (see page 191)

### Field Mapping pane

The Field Mapping pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, System Administration, Service Desk Integration, Field Mapping (when Unicenter KT is installed)
- Administration, Knowledge, Settings, Service Desk Integration, Field Mapping (when Unicenter KT is not installed)

Use the Field Mapping pane to specify which Unicenter SD fields to populate with Unicenter KT information, and whether to overwrite existing information.

This pane contains the following fields:

#### **Populate Service Desk Values from Knowledge Tools**

Specifies whether to use information from Unicenter KT to populate fields in Unicenter SD issues or requests.

- Select the check box to make fields in the Knowledge Tools, Populate Empty Service Desk Values, and Overwrite Service Desk Values columns available so you can specify which Unicenter KT information to use to populate fields in Unicenter SD issues or requests.
- Clear the check box to make fields in the Knowledge Tools, Populate Empty Service Desk Values, and Overwrite Service Desk Values unavailable. In this case, users must manually populate Unicenter SD issues or requests created from Unicenter KT.

**Default:** This check box is selected.

#### **Service Desk**

Identifies the fields in Unicenter SD issues or requests that correspond to Unicenter KT fields listed in the Knowledge Tools column.

For each check box selected in the Populate Empty Service Desk Values column, information from the corresponding field in the Knowledge Tools column will populate the Unicenter SD issue or request.

The Service Desk column lists the following fields:

- Summary
- Description
- Root Cause
- Product
- Asset
- Severity
- Impact
- Urgency
- Service Desk Priority
- Request Area
- Parent

### **Knowledge Tools**

Identifies the Unicenter KT fields that correspond to the Unicenter SD fields listed in the Service Desk column.

For each check box selected in the Populate Empty Service Desk Values column, information from the corresponding field in the Knowledge Tools column will populate the Unicenter SD issue or request.

The Knowledge Tools column contains two drop-down lists:

- The first drop-down list corresponds to the Summary field in the Service Desk column and specifies the Unicenter KT field (Title, Summary, or Problem) with which to populate the Summary field in a Unicenter SD issue or request.

**Default:** Summary.

The second drop-down list corresponds to the Description field in the Service Desk column and specifies the Unicenter KT field (Title, Summary, or Problem) with which to populate the Description field in a Unicenter SD issue or request.

**Default:** Problem.

The Knowledge Tools column also lists the following fields:

- Root Cause
- Product
- Asset
- Severity
- Impact
- Urgency

- Approval Process Priority
- Category
- Parent

### **Populate Empty Service Desk Values**

Specifies which empty fields in a Unicenter SD issue or request to populate with information from Unicenter KT.

- Select a check box to map information from the Unicenter KT field to the corresponding Unicenter SD field if that field currently contains no information.
- Clear a check box if you do not want to map information from the Unicenter KT field to the corresponding Unicenter SD field.

**Default:** The check boxes corresponding to the Summary, Description, Product, Asset, and Request Area fields in Unicenter SD are selected.

### **Overwrite Service Desk Values**

Specifies which fields in a Unicenter SD issue or request to overwrite with information from Unicenter KT.

- Select a check box to replace information in the Unicenter SD field with information from the corresponding Unicenter KT field.
- Clear a check box if you do not want to replace information in the Unicenter SD field with information from the corresponding Unicenter KT field.

These check boxes are only available when the corresponding check boxes in the Populate Empty Service Desk Values column are selected.

**Default:** All Overwrite Service Desk Values check boxes are cleared.

This pane contains the following buttons:

#### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

#### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Issue Search Configuration pane

The Issue Search Configuration pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, Service Desk Integration, Issue Search Configuration (when Unicenter KT is installed)
- Administration, Knowledge, Settings, Service Desk Integration, Issue Search Configuration (when Unicenter KT is not installed)

Use the Issue Search Configuration pane to select the fields to search when you click the Search Knowledge button on a ticket.

This screen controls which fields from the ticket are copied to the corresponding fields in the Search Filter on the Knowledge tab of an Issue Detail window. The population of the Search Filter fields from the ticket occurs when the Knowledge tab is selected or the Reset Filter button (on the Knowledge tab) is clicked.

On the Search Configuration window, the selection of Summary and Description is exclusive - you cannot select both. When you are in the edit window of an Issue, this choice controls where the Search Knowledge button appears. When you select Description on the Search Configuration window, the Search Knowledge button will appear above the Description field of a ticket. If you choose Summary, it will appear above the Summary. When the Search Knowledge button is clicked, it will bring the Knowledge tab into view, populate the fields of the Search Filter, and perform the knowledge search.

The Search Configuration windows are only available when the full KT product is installed. If the full KT product is not installed, these windows are hidden, and the Search Filter (Knowledge tab of a ticket) uses the simplified Keyword Search format. In this case, only the ticket summary is used to populate Search Filter.

This pane contains the following fields:

### **Service Desk Field**

The Service Desk Field column lists the following fields:

- Summary
- Description
- Asset
- Severity
- Impact
- Urgency
- Priority

- Category
- Root Cause
- Product

### Use this Information

Under "Use this information", check the boxes for the fields you want to search when clicking the Search Knowledge button on a ticket.

**Default:** The check boxes corresponding to the Summary and Description Service Desk fields are selected.

This pane contains the following buttons:

### Reset Defaults

Returns all fields on the pane, window, or dialog to their default values.

### Save

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

## Request Search Configuration pane

The Request Search Configuration pane opens when you select either of the following from the left pane of the Administration tab:

- Administration, Knowledge, System Administration, Service Desk Integration, Request Search Configuration (when Unicenter KT is installed)
- Administration, Knowledge, Settings, Service Desk Integration, Request Search Configuration (when Unicenter KT is not installed)

Use the Request Search Configuration pane to select the fields to search when you click the Search Knowledge button on a ticket.

This screen controls which fields from the ticket are copied to the corresponding fields in the Search Filter on the the Knowledge tab of an Request Detail window. The population of the Search Filter fields from the ticket occurs when the Knowledge tab is selected or the Reset Filter button (on the Knowledge tab) is clicked.

On the Search Configuration window, the selection of Summary and Description is exclusive - you cannot select both. When you are in the edit window of a Request, this choice controls where the Search Knowledge button appears. When you select Description on the Search Configuration window, the Search Knowledge button will appear above the Description field of a ticket. If you choose Summary, it will appear above the Summary. When the Search Knowledge button is clicked, it will bring the Knowledge tab into view, populate the fields of the Search Filter, and perform the knowledge search.

The Search Configuration windows are only available when the full KT product is installed. If the full KT product is not installed, these windows are hidden, and the Search Filter (Knowledge tab of a ticket) uses the simplified Keyword Search format. In this case, only the ticket summary is used to populate Search Filter.

This pane contains the following fields:

#### **Service Desk Field**

The Service Desk Field column lists the following fields:

#### **Summary**

- Description
- Asset
- Severity
- Impact
- Urgency
- Priority
- Request Area
- Root Cause

#### **Use this Information**

Under "Use this information", check the boxes for the fields you want to search when clicking the Search Knowledge button on a ticket.

**Default:** The check boxes corresponding to the Summary and Description Service Desk fields are selected.

This pane contains the following buttons:

#### **Reset Defaults**

Returns all fields on the pane, window, or dialog to their default values.

#### **Save**

Saves and applies your settings and (when appropriate) closes the pane, window, or dialog.

# Chapter 7: Knowledge Tab

---

The Knowledge tab is the main interface for providing Unicenter KT users with access to documents in the knowledge base to quickly resolve issues. From the Knowledge tab, users can:

- Browse categories of documents and view documents by category
- Perform natural language (NLS) and keyword searches of the knowledge base
- Filter and sort documents
- Open and work with information provided by knowledge documents and knowledge tree documents
- Create a new document by right-clicking a node and selecting either Create Knowledge Document or Create New Knowledge Tree Document
- Bookmark documents to quickly find frequently referenced knowledge sources
- Submit knowledge for possible inclusion in the knowledge base

Users with analyst, knowledge engineer, knowledge manager, or system administrator rights can access the Administration tab, which is the centralized console for managing content for each problem-solving model in the knowledge base.

This tab has the following components:

## **Category pane**

The left pane, or Category pane, displays the hierarchical categories in which the documents comprising the knowledge base are stored. It also includes the My Bookmarks folder (which contains documents you have bookmarked for quick access) and the New Documents folder (which contains documents created in the last  $n$  days). Use the Category pane to navigate the knowledge base and to select the category whose documents display in the Knowledge Document List pane.

## **Menu Bar**

The menu bar on the Knowledge tab provides access to the File, View, Reports, Window, and Help menus.

## **Knowledge Search pane**

The Knowledge Search pane at the top of the right pane contains controls with which you can specify criteria for and initiate a basic or advanced search of the knowledge base. Click Advanced Search to display the advanced search fields; click Hide to display only the basic Search box. When you click Search, the Knowledge Document List pane shows the list of documents that match your search criteria.

### Knowledge Document List pane

The right pane, or Knowledge Document List pane, displays the documents that reside in the folder or category selected from the Category pane. Use the Knowledge Document List pane to browse the list of documents in a folder or category and to select documents with which to work.

This tab has a vertical split bar that you can drag right or left to adjust the size of the panes.

## Windows

The Knowledge tab provides access to a number of windows to help you access multiple knowledge modules and perform rapid knowledge base searches to quickly resolve issues. Typically, a window opens when you select a command from a menu or click a button in another window. For example, when you select Preferences from the View menu, the Preferences window opens.

### Add File window

The Add File window opens when you do either of the following:

- Right-click a folder or repository in the Repositories list from the Administration tab and select Add File from the shortcut menu
- Right-click a folder or repository in the Repositories list on the Attachments tab on the Update Knowledge Document window and select Add File from the shortcut menu

Use the Add File window to specify the location and name of a file to upload to the attachment library. When you click Upload, the product puts the specified file in the folder or repository you selected.

This window contains the following fields:

#### File

Defines the location and name of a file to upload to the attachment library. If you click the Browse button, a standard Windows Choose File window opens so you can choose the file to upload.

**Example:** C:\mydirectory\myfile.doc

#### Name

Enter an internal name that you can use to track the file.

**Description**

Enter an internal description of the file, for example, what the file is for, what it contains, or other descriptive text.

This window contains the following buttons:

**Browse**

Opens a standard Windows Choose File window on which you can navigate to and select a file to upload.

**Upload**

Uploads the specified file to the attachment library and displays a prompt when the upload finishes. Click OK to close the prompt.

**Close**

Closes the document, window, or dialog.

## Category Selection window

The Category Selection window opens when you click  on the Category box in the Knowledge Search pane on the Knowledge tab.

The Category Selection window displays the hierarchical categories in which documents comprising the knowledge base reside. Use the window to select categories and subcategories in which to search.

Click  or  as necessary to open and close branches of the category tree. When you click a category or subcategory on the Category Selection window, the window closes and the selected category path appears in the Category box in the Knowledge Search pane. To close the window without selecting a category, click Close Window.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

## Create New Comment window

The Create New Comment window opens when you click Add Comment on the Comments tab on the Create New Document window or the Update Knowledge Document window.

Use the Create New Comment window to enter a brief comment about the document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Comment**

Defines a comment that provides information about the document. This field is required.

This window contains the following buttons:

### **Cancel**

Discards changes and opens view mode.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves the comment and opens the View Comment window.

## Create New/Update/Detail Document Windows

The Create New, Update, and Detail Document windows open when you do any of the following:

- Right-click a category name in the Category pane of the Knowledge Categories pane on the Knowledge or Administration tab and select Create Knowledge Document or Create Knowledge Tree Document from the shortcut menu
- Right-click a document title in the Knowledge Document List pane of the Knowledge Categories pane on the Knowledge or Administration tab and select Create Knowledge Document or Create Knowledge Tree Document from the shortcut menu
- Select a category in the Category pane of the Knowledge Categories pane on the Knowledge or Administration tab, then select Create Knowledge Document or Create Knowledge Tree Document from the File menu

- Select New Knowledge Document or New Knowledge Tree Document from the File menu on the Knowledge tab (when Unicenter KT is installed) or the Keyword Search tab (when Unicenter KT is not installed).
- Click Save on the Create New Document window
- Right-click a document title in the Knowledge Categories pane on the Knowledge or Administration tab and select Open from the shortcut menu
- Click a document title in the Knowledge Categories pane on the Knowledge or Administration tab
- Right-click a document title in the Knowledge Document List pane on the Keyword Search tab and select Edit from the shortcut menu
- Click Edit from the Knowledge Document window
- Right-click a document title in the Knowledge Document List pane and select Edit from the shortcut menu

Use the Create New Document window to define the initial content of a new knowledge document.

**Important!** Make sure you use significant searchable words when filling in the Title, Summary, Problem and Resolution text fields, not just noise words. If you use only noise words, your document will become inaccessible after it is saved and indexed.

Use the Update Knowledge Document window to update the content, attributes, permissions, category and document relationships, attachments, comments, and notifications for a document and to review the document's history.

**Note:** The Update Knowledge Document window appears as the Detail Document window, without specifically stating the term update. Use the notebook pages to update the document.

These windows include the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

These windows contain one or more of the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments

- Notifications
- History

These windows contain some or all of the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Assign to Category Owner**

This check box lets you indicate whether to assign the new document to a category owner. Click the check box to assign the new document to a category owner, or click again to un-check. This field is enabled on the Create New Document window only.

**Title**

Defines a short, descriptive name for the document. For knowledge tree documents, the value in the Title box also defines the name of the primary node in the knowledge tree.

**Summary**

Defines a summary that briefly describes the problem associated with the document. Use the Problem box to describe the problem in detail.

**Problem**

Defines the full description of the problem associated with the document. NLS search type is based on this field.

**Resolution**

Defines the description of how to resolve the problem. Click Edit Resolution to open the HTML Editor so you can create or update the resolution. This field only displays when you are creating or updating a knowledge document.

**Quick View**

Specifies to display content in the associated field as it will appear at runtime. This field only displays when you are creating or updating a knowledge document.

**HTML Source**

Specifies to display content in the associated field as editable HTML source code. Select this option to make simple changes directly to the HTML code. This field only displays when you are creating or updating a knowledge document.

**Notes**

Defines additional information about the document. The contents of this field are available only to analysts.

Depending on the approval process task with which the document is currently associated, these windows may contain the following buttons:

**Edit**

Opens the Create/Update Document window so you can modify document contents and attributes. The edit window will only open if you are a user with write permission to the document. If you do not have write permission to the document, the read-only view window will open instead.

**Forward**

Opens the Forward Document window so you can assign the document to the analyst who will complete the next task in the approval process. When you click OK to forward the document, the Forward Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Forward button displays for all approval process tasks except the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

**Publish**

Opens the Knowledge Document Detail window and makes the document available for viewing.

**Note:** System administrators can use the Publish button at any time to bypass the approval process and immediately publish a document. Analysts working on a document can use the Publish button if the document is at the last stage of the approval process and ready to be published.

### **Reject**

Opens the Reject Document window so you can reject the document, reassigning it to the previous assignee. When you click OK to reject the document, the Reject Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Reject button displays for all approval process tasks except the first (which is, by default, Create Document).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

### **Unpublish**

Changes the status of the document from "Published" to draft (or the appropriate custom status), and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

### **User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

### **Cancel**

Discards changes and opens view mode.

### **Design Tree**

Opens the DT Builder so you can create the knowledge tree structure to associate with the document. This button only displays when you are creating or updating a knowledge tree document.

### **Edit Resolution**

Opens the HTML Editor so you can use plain text or HTML elements to design a resolution for the problem that the knowledge document addresses. This button only displays when you are creating or updating a knowledge document.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves changes to the current document.

**Note:** The Save button is only available on the Update/Create Document window if you have write access to the document. A document is read-only when it is published (as per Administrative option) or retired, or when the document's permissions preclude you from changing it.

### Spell Check All Fields

Checks the content of the Title, Summary, Problem, Resolution, and Notes fields. If the text of any of the fields contains a spelling error (that is, a word that does not exist in the product dictionary), the Spell Check Results window opens. The window shows the contents of all non-empty fields, separated by headers of the form --TITLE--, --SUMMMARY-- and so on, with the first misspelled word highlighted.

## Date Helper window

The Date Helper window opens when you click  on a window or dialog on which you must specify a date and time.

Use the Date Helper window to select when an event defined by the window or dialog from which you accessed the Date Help window occurs.

This window contains the following fields:

### Month

Specifies the month during which an event occurs.

**Default:** The month during which the Date Helper window opened.

### Year

Specifies the year during which an event occurs.

**Limits:** The year must be in the range 1994 to 2013.

**Default:** The year during which the Date Helper window opened.

### Calendar

Displays the days of the selected month and year. Click a day to select it.

**Default:** The day during which the Date Helper window opened.

### 24-Hour

Specifies how to display the values in the Hour list.

- Select the 24-Hour check box to display values in the Hour list using 24-hour time format.

**Example:** 15.

Clear the 24-Hour check box to display values in the Hour list using 12-hour time format.

**Example:** 3 pm.

**Default:** The check box is cleared.

**Hour**

Specifies the hour during which an event occurs.

**Default:** The hour during which the Date Helper window opened.

**Minute**

Specifies the minute during which an event occurs.

**Default:** The minute during which the Date Helper window opened.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Next**

Sets the Month value to the month that follows the current selection and refreshes the Calendar control to display the days of the newly selected month.

**OK**

Closes the Date Helper window and sets the value of the field from which you accessed the window to the selected date and time.

**Prev**

Sets the Month value to the month that precedes the current selection and refreshes the Calendar control to display the days of the newly selected month.

## Email Document window

The Email Document window opens when you click Email on the Page Options menu when viewing a document.

Use the Email Document window to email a link to the document or a copy of the document to specified recipients.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Your Name**

Defines the name (in "last name, first name" format) of the user to identify as sender of the email.

**Default:** Your name (as specified to the product).

**Your Email**

Defines the email address of the email sender.

**Default:** The email address associated with your user account.

**Send To**

Defines the email addresses of contacts to whom you want to send the document or link. Enter one or more email addresses, or click  to open the Contact Search window so you can search for and select contacts. Use semicolons (;) to separate multiple email addresses.

**Subject**

Defines a subject for the email.

**Default:** The document's type (Knowledge Document or Knowledge Tree Document) and ID.

**Personal Message**

Defines a text message to accompany the document or link you are sending.

**Send Document**

Specifies how the product should attach the document to your email. Select one of the following options:

**In HTML**

The product inserts the document in the body of the email in HTML format. Recipients can view the document directly in the email.

**Link Only**

The product inserts a URL link in the email. Recipients must click the link to display the document in a web browser.

**Default:** In HTML.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Closes the Email Document window and sends the email to the specified recipients.

## Event for Document View window

The Event for Document window opens when you right-click an Event on the History tab of the Update Knowledge Document window and select View from the shortcut menu. The fields on this window are read-only.

Use the Event for Document window to view the detail of the selected event.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Event**

Displays the name of the selected event.

### **Event Detail**

Displays the detail information for the selected event.

### **Time Stamp**

Displays the date and time (in *mm/dd/yyyy hh:mm am/pm* format) at which the selected event occurred.

**Example:** 08/23/2004 04:13 am

## Forward Document window

The Forward Document window opens when you click Forward on the Update Knowledge Document window.

Use the Forward Document window to move a document to the next stage of the approval process and to assign the document to an analyst for that stage. You can also specify an optional comment for the document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Next Task**

Displays the approval process task to which the document will be forwarded. This field is read-only.

---

### Next Status

Displays the approval process status to which the document will be forwarded. The default statuses are:

#### Draft

The document has been created, and possibly assigned to an analyst for review and modification, but is not currently available in the knowledge base (that is, it is not published).

#### Published

The document is available in the knowledge base and those users or groups with access can view it.

#### Retired

The document has been removed from the knowledge base, either manually or as the result of the expiration date passing, and is no longer available.

This field is read-only.

### Next Assignee

Specifies a contact to have responsibility for the document for the duration of the next approval process task. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

### Comment

Defines a comment that provides information about the document.

This window contains the following buttons:

#### Cancel

Discards changes and opens view mode.

#### OK

Prompts you to confirm forwarding the document to the next approval process task. When you click OK, the Forward Document window closes. The forwarded document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

## Knowledge Document List pane

The Knowledge Document List lists the documents that reside in the category selected from the Category pane item selected. Initially, the Knowledge Search (see page **Error! Bookmark not defined.**) window displays, allowing you to perform a standard or advanced search. Use the filter controls to specify criteria by which to search for documents from the current category or folder, display or select (if you accessed this window from a field lookup  link).

By default, the document list is sorted by FAQ rating (see below), so that the Top category presents the most usable documents of the entire knowledge base.

Right-click a document in the list to display the document shortcut menu (see page **Error! Bookmark not defined.**).

This pane contains the following columns:

### **Title**

By default, displays the title and summary information defined for each document in the result set. When you click the document title, the document opens. When you right-click the document, the Knowledge Document List shortcut menu opens.

### **Attributes**

Displays the attributes for each document in the result set. Use the Preferences window to specify which attributes display. By default, the Attributes column includes the Document ID and Modify Date attributes.

If the Knowledge Document List pane contains more documents than can display on a single page, you can use the following browse links at the top of the pane to navigate the list:

<<

Displays the first page of documents.

<

Displays the previous page of documents.

>

Displays the next page of documents.

>>

Displays the last page of documents.

### **List All**

Displays all of the documents in a single scrollable list.

---

An indicator at the top of the Knowledge Document List pane displays your current position and the total number of documents in the list.

This pane contains the following field:

**Order By**

Specifies the order in which to display documents in the selected category and its subcategories. Select one of the following options:

**FAQ Rating**

Sorts documents based on their FAQ rating, which considers how often the document is accessed, how helpful it has been to users, and its age. Documents with the highest FAQ ratings are listed first.

**Hits**

Sorts documents by the number of times users have accessed them, with the most frequently accessed documents listed first.

**Modify Date**

Sorts documents by the date on which they were last modified, with the most recently modified documents listed first.

**Solution Count**

Sorts documents by the number of issues or requests they have resolved, as reported by users. Documents with the highest solution counts are listed first.

**Default:** FAQ Rating.

## Knowledge Document Detail window

The Knowledge Document Detail window opens when you do any of the following:

- Click Cancel on the Update Knowledge Document window
- Click Publish on the Update Knowledge Document window, then click OK to confirm publishing
- Click OK on the Forward Document window, then click OK to confirm forwarding
- Click OK on the Reject Document window, then click OK to confirm rejection

Use the Knowledge Document Detail window to review the content and attributes defined for a document, to unpublish a document, or to preview a document as users will see it at runtime.

This window contains the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments
- Notifications
- History

This window contains the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

This window contains the following buttons:

**Edit**

Opens the Update Knowledge Document window so you can modify document contents and attributes. This command only displays for the document owner, for system administrators, and when the document status is "Unpublished."

**Unpublish**

Changes the status of the document from "Published" to "Unpublished", and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

---

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

### **User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

## **Knowledge Tree Document window**

The Knowledge Tree Document window opens when you do any of the following:

- Right-click a knowledge tree document title in the Knowledge Categories pane, then select Document View from the shortcut menu
- Click a knowledge tree document title in the Knowledge Document List on the Knowledge tab
- Right-click a knowledge tree document title in the Knowledge Document List on the Knowledge tab, then select View from the shortcut menu.

Use the Knowledge Tree Document window to view and interact with a knowledge tree document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Documents contain a variety of information organized to optimize user access. Documents created using the default Built In - Knowledge Tree Document template are divided into three areas:

- The left pane contains a dynamic map of the document. The bottom entry in the map indicates the current location in the document. Use the map in the left pane as necessary to navigate to previously viewed branches of the knowledge tree document.
- The right pane contains the knowledge tree document, a menu, and two boxes that let you rate and comment upon it the document. This pane contains the following components:

### **Document View**

Displays the document as a knowledge tree. In this mode, the window contains information about the problem the document addresses, the suggested resolution for the problem, and links to related resources. To view the document as a knowledge tree, click the Display button under the Resolution heading.

### Tree Navigation

Provides navigation to nodes in the knowledge tree that you have already viewed. The following links may be available:

- **Tree Description**-Displays a description of the purpose of the knowledge tree document, if one was defined.
- **Start Over**-Returns to the first page of the document.
- **Prev**-Returns to the previous page of the document.
- **Next**-Returns to the next page of the document.
- **Last**-Returns to the last viewed page of the document.

### Page Options menu

Displays commands for interacting with the document. Use the Page Options commands to edit, email, bookmark, print, close, and subscribe to the current document. You can also create a new request or create a new request based on the document being viewed, depending on how you accessed this window.

### Solution Survey

Defines feedback regarding the effectiveness of the document in answering your question and lets you open an issue or request. The product uses your feedback to calculate the document's FAQ rating.

### Comment

Defines comments to add to the document. For example, you might add a comment that clarifies the document's resolution. Comments you add display under the Comments heading in the document body.

**Note:** Documents created using a customized template may contain different information.

## Preferences Window

The Preferences Settings window opens when you do either of the following:

- Select Preferences from the View menu
- Click Edit on the Preferences Detail window

Use the Preferences window to set default Knowledge Tools behaviors.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Avoid Popups**

Specifies whether to reduce the number of new browser windows opened by displaying new forms in the main browser window whenever possible.

- Select the check box to minimize the number of new browser windows opened.
- Clear the check box to open new browser windows according to the properties set in the form definition.

**Default:** Cleared.

**Note:** If this option is selected, the Back to List button will be activated, and can be used to navigate from detail forms back to the previously displayed list window. The Back to List button will appear in the upper right-hand side of the window.

### **Display Score Count**

Specifies whether you want to display the score count left-justified.

**Default:** Cleared.

### **Keep Log Reader Window**

Specifies whether to keep the Log Reader window open when you select the Close All Popups command from the Window menu and after you log off of Knowledge Tools. This setting has no effect when the Log Reader window is not open.

- Select the check box to keep the Log Reader window open.
- Clear the check box to close the Log Reader window when you select the Close All Popups command or log off of Knowledge Tools.

**Default:** Selected.

### **Preserve Popup Size**

Specifies whether to open new popup windows with the same dimensions as the most recently resized popup window.

- Select the check box to use the new dimensions for new popup windows.
- Clear the check box to open new popup windows with default dimensions.

**Default:** Selected.

**Note:** If you set Preserve Popup Size to on (checked), and you maximize a popup window, subsequent popup windows may cover any other Service Desk window you may have open. However, new popup windows will appear slightly off the screen, to the right and lower. This is because there is a 10 pixel (left and top) offset for popups - so that they do not completely overlay the currently displayed window. It is recommended that you do not maximize popup windows when using the Preserve Popup Size option.

### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### **Using Screen Reader**

Selecting this preference modifies Service Desk behavior for optimal use with a screen reader for blind and limited vision users. You must log off and log back on again after changing this preference. From the Service Desk Help menu, select the item "Screen Reader Usage", for an overview of using Service Desk with a screen reader.

### **Search Type**

Specifies the default type of search to perform. Select one of the following options:

#### **Keyword Search**

Select this option to search for the specified keywords in the Title, Summary, Problem, and Resolution fields of documents.

#### **Natural Language Search**

Select this option to search for the specified keywords in the Problem fields of documents.

The Search Type field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Keyword Search.

### **Match Type**

Specifies the default method for text matching during a search. Select one of the following options:

#### **Any of the Words (OR)**

A match occurs if the product finds *any* of the words specified in the Keywords for Advanced Search box in a document.

#### **All of the Words (AND)**

A match occurs only if the product finds *all* of the words specified in the Keywords for Advanced Search box in a document.

### Exact Phrase

A match occurs only if the product finds the exact phrase specified in the Keywords for Advanced Search box in a document.

The Match Type field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Any of the Words (OR).

### Match

Specifies the default method by which the product searches documents. Select one of the following options:

#### Whole words

The search retrieves only documents that contain the entire words entered.

#### Words beginning with...

The search retrieves documents that contain the entire words entered or words that begin with the words entered. For example, a search for the word "print" also returns documents containing the words "printer" or "printing".

The Match field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Whole words.

### Order By

Specifies the default property by which to sort documents retrieved. The Order By field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Relevance.

### Search In

Specifies which document fields to search for specified keywords. When you click Search, the product returns only documents that contain the specified keywords in the fields specified by the selected *Search In* check boxes. Select any combination of the following check boxes:

- Problem
- Resolution
- Summary
- Title

These check boxes only display when Keyword Search is the selected search type. If you select Natural Language Search from the Search Type list, the Search In check boxes do not display and the product only searches the Problem fields of documents.

**Default:** All check boxes are selected.

#### **Documents Per Page (Knowledge Document List Settings)**

Specifies the number of documents (25 or 50) to display on each page of the Knowledge Document List pane.

**Default:** 25.

#### **Show Document List Details**

Specifies whether detailed information displays in the Knowledge Document List pane on the Knowledge tab.

Select the check box to display the following default information:

- Title
- Summary
- Document ID
- Modify Date

Clear the check box to display only the document title.

**Default:** The check box is selected.

#### **Documents Per Page (Knowledge Categories Document List Settings)**

Specifies the number of documents (25 or 50) to display on each page of the Knowledge Document List pane.

**Default:** 25.

#### **Attributes to be shown in list**

Displays two lists with which you can define the properties that display for each document in the Knowledge Document List pane on the Knowledge Categories pane of the Administration tab.

- To display a property in the Knowledge Document List pane, select it from the Available List and use the > (Select Item) button to move it to the Selected list.
- To move all of the properties from the Available list to the Selected list, click >> (Select All Available Items).
- To remove a property from the Knowledge Document List pane, select it from the Selected list and use the < (Remove Item from Selected List) button to move it to the Available list.
- To move all of the the properties from the Selected list to the Available list, click << (Remove All Items from Selected List).

To select multiple items in either the Available or Selected list, hold down the Ctrl key while you click each item you want to select or hold down the Shift key while you click the first and last items in a series.

**Default:** DOC ID, Owner, Assignee, Modify Date, and Document Status display in the Selected list.

---

**Note:** Choosing attributes different than the Preference default may impact performance. If you believe that extra display columns are needed, contact the system administration and ask them to use the Web Screen Painter utility to modify the default page columns for the Document List form.

### **Active Zone**

From the drop down list, select the active zone for your Global Knowledge Tools environment, for example, your organization's Intranet.

This window contains the following buttons:

#### **Cancel**

Discards changes and opens view mode.

#### **Reset**

Returns all fields on the window or dialog to their default values.

#### **Save**

Saves and applies the specified settings, closes the current window, and opens the Preferences Detail window.

## Preferences Detail window

The Preferences Detail window opens when you click Save or Cancel on the Preferences window.

Use the Preferences Detail window to review default Knowledge Tools behaviors. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

#### **Avoid Popups**

When selected, will reduce the number of new browser windows opened by displaying new forms in the main browser window whenever possible.

**Note:** If this option is selected, the Back to List button will be activated, and can be used to navigate from detail forms back to the previously displayed list window. The Back to List button will appear in the upper right-hand side of the window.

#### **Display Score Count**

Displays the score count as left-justified..

### **Keep Log Reader Window**

Displays whether the product will keep the Log Reader window open when you select the Close All Popups command from the Window menu and after you log off of Unicenter SD. This setting has no effect when the Log Reader window is not open.

### **Preserve Popup Size**

Displays whether the product will open new popup windows with the same dimensions as the most recently resized popup window.

**Note:** If you set Preserve Popup Size to on (checked), and you maximize a popup window, subsequent popup windows may cover any other Service Desk window you may have open. However, new popup windows will appear slightly off the screen, to the right and lower. This is because there is a 10 pixel (left and top) offset for popups - so that they do not completely overlay the currently displayed window. It is recommended that you do not maximize popup windows when using the Preserve Popup Size option.

### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### **Using Screen Reader**

Selecting this preference modifies Service Desk behavior for optimal use with a screen reader for blind and limited vision users. You must log off and log back on again after changing this preference. From the Service Desk Help menu, select the item "Screen Reader Usage", for an overview of using Service Desk with a screen reader.

### **Search Type**

"Using" indicates the type of search to perform. Select either Keyword Search or Natural Language Search.

### **Match Type**

Displays the default method for text matching during a search. Possible values are Any of the Words (OR), All of the Words (AND), and Exact Phrase.

### **Match**

Displays the default method by which the product searches documents, either Whole Words or Words Beginning With.

### **Order By**

Displays the default property by which the product will sort documents retrieved.

### Mouseover Menus

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### Search In

Displays which document fields the product will search for specified keywords. These check boxes only display when Keyword Search is the selected search type.

### Documents Per Page (Knowledge Document List Settings)

Displays the number of documents (10, 25, or 50) that the product will display on each page of the Knowledge Document List pane.

### Show Document List Details

Displays whether the Knowledge Document List pane on the Knowledge tab includes detailed information. If the check box is selected, the following default information displays:

- Title
- Summary
- Document ID
- Modify Date

If the check box is cleared, on the document title displays.

### Documents Per Page (Knowledge Categories Document List Settings)

Displays the number of documents (10, 25, or 50) that the product will display on each page of the Knowledge Document List pane.

### Attributes to be shown in list

Displays the properties listed for each document in the Knowledge Document List pane of the Knowledge Categories pane on the Administration tab.

**Note:** Choosing attributes different than the Preference default may impact performance. If you believe that extra display columns are needed, contact the system administration and ask them to use the Web Screen Painter utility to modify the default page columns for the Document List form.

### Active Zone

From the drop down list, select the active zone for your Global Knowledge Tools environment, for example, your organization's Intranet.

This window contains the following buttons:

### Edit

Opens the Preferences window so you can modify preferences.

## Preview Window (User View)

The Preview window opens when you do either of the following:

- Click User View on the Update Knowledge Document window
- Click User View on the Knowledge Document Detail window
- Right-click a Document in the Document List in the Knowledge Categories window under the Administration tab, and select User View

Use the Preview window to view the current document as it will display to users at runtime. This enables you to verify your design before you publish the document. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Use the Print command in the Page Options menu on the upper right side of the Preview window to opens a standard Windows Print dialog so you can specify options for printing the contents of the current document.

## Knowledge Document Window

The Knowledge Document window opens when you do either of the following:

- Click a Knowledge Document icon or title on:
  - The Knowledge Document List on the Knowledge tab.
  - The Knowledge Document List of the Knowledge Documents nodes of the Scoreboard on the Knowledge Tools tab.
- Right-click a knowledge document title in the Knowledge Categories pane on the Administration tab, then select Document View from the shortcut menu
- Right-click a knowledge document title in the Knowledge Document List on the Knowledge tab and select View from the shortcut menu.
- Click a Knowledge Document link, for example, under the Top Solutions section.
- Click a Knowledge Document link, for example, under the Top Solutions section of *Customer or Employee* user interface
- Click a Knowledge Document icon or title in Activities tab of a Request or an Issue of KT Log Solution type
- Click a Knowledge Document icon or title after search on the Knowledge tab of a Request or an Issue

---

Use the Knowledge Document window to view and interact with a knowledge document.

**Note:** To create a new document or update an existing document, see Create New/Update/Detail Document Windows.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Documents contain a variety of information organized to optimize user access. Documents created using the default Built In - Knowledge Document template are divided into two areas:

- The left side of the document (the document body) contains information about the problem the document addresses, the suggested resolution for the problem, and links to related resources. In addition to the document title, specific information displayed may include the following:

**Summary**

Displays a brief description of the problem associated with the document.

**Problem**

Displays the full description of the problem associated with the document.

**Resolution**

Displays the description of how to resolve the problem.

**See Also**

Displays links to other documents in the knowledge base that are related to the current document. Click a link under See Also to open the associated document in a new window.

**Attachments**

Displays links to files attached to the document as supplemental information. When you click a link, the attached file opens in an appropriate application.

**Related Categories**

Displays links to categories that are related to the document. Click a link under Related Categories to list the documents that reside in the linked category and its subcategories in the Knowledge Document List pane.

**Related Tickets**

Lists any tickets related to this document.

**Properties**

Displays the properties specified in the document template. By default, the numeric Document ID and the date on which the document was created are displayed.

### Comments

Displays comments added by document users through the Comment box on the document. Each comment displays with the name and email address of the contact who entered it and the date the comment was entered.

- The right side of the document contains menus, page option links, solution survey fields, and comment fields.

### Page Options

Displays commands for interacting with the document. Use the Page Options commands to edit, email, bookmark, print, close, and subscribe to the current document. You can also create a new request or create a new request based on the document being viewed, depending on how you accessed this window.

- The Solution Survey and Comments are two boxes that let you rate and comment upon the document:

#### Solution Survey

Defines feedback regarding the effectiveness of the document in answering your question and lets you open an issue or request. The product uses your feedback to calculate the document's FAQ rating.

#### Comment

Defines comments to add to the document. For example, you might add a comment that clarifies the document's resolution. Comments you add display under the Comments heading in the document body.

**Note:** Documents created using a customized template may contain different information.

## Reject Document window

The Reject Document window opens when you click Reject on the Update Knowledge Document window.

Use the Reject Document window to move a document to a previous approval process task and assign an analyst to the document for that task. When multiple previous tasks exist, system administrators can choose the approval process task to which the document will revert. Assignees without administrator privileges can reject the document back to the previous task in the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

---

This window contains the following fields:

**Title**

Displays the title of the document. This field is read-only.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

**Previous Tasks**

Lists approval process tasks to which the document can revert. This field only displays if the current assignee has administrator privileges and there are multiple previous tasks in the approval process.

For each task, the Previous Tasks list displays the assignee who completed the task and the date on which the document was forwarded. When you click a task name to select the task to which to reject the document, the Reject Document window refreshes so you can specify an assignee and enter a comment.

**Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm rejecting the document to a previous approval process task. When you click OK, the Reject Document window closes and the rejected document appears in the specified assignee's Inbox in the Knowledge Document folder on the Service Desk tab.

The Spell Check Results window opens when you check spelling or click the Spelling button. The spell checker scans the header or body information and displays each unrecognized word in the Spell Check Results window. Use the window to specify what action to take on such words. When you correct or otherwise act upon a word, the product moves to the next unrecognized word, and so on until it has scanned the entire header or body.

You can use the Spell Check Results window to do the following:

- Correct the spelling of a specific occurrence of the unrecognized word in the template header or body
- Correct the spelling of all occurrences of the unrecognized word in the template header or body
- Select a word to replace the unrecognized word
- Ignore a specific occurrence of the unrecognized word in the template header or body
- Ignore all occurrences of the unrecognized word in the template header or body

This window contains the following fields:

**Not in Dictionary**

Displays the word that the product has identified as misspelled (that is, not in the product dictionary).

**Limits:** This field is read-only.

**Change To**

Displays the word in the product dictionary that is the closest in spelling to the unrecognized word or the current selection from the Suggestions list.

You can accept the spelling of the replacement as presented or type an alternate spelling in the Change To box, then do one of the following:

- Click Change. The product changes the current occurrence of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.

- Click Change All. The product changes all occurrences of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.

**Suggestions**

Specifies words that are close in spelling to the unrecognized word. When you select a word from the list, it displays in the Change To box.

**Context**

Displays the unrecognized word in the context in which it is used in the template.

Editing the text in the Context box has no effect on the template's contents.

This window contains the following buttons:

**Change**

Changes the current occurrence of the word in the Not in Dictionary field to the word in the Change To box.

**Change All**

Changes all instances of the word in the Not in Dictionary field to the word in the Change To box.

**Close**

Closes the document, window, or dialog.

**Ignore**

Disregards the current instance of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

**Ignore All**

Disregards all instances of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

## Unpublish Document window

The Unpublish Document window opens when you do either of the following:

- Click Unpublish on the Update Knowledge Document window
- Click Unpublish on the Knowledge Document Detail window

Use the Unpublish Document window to remove the document from the knowledge base so it is no longer available to users. If you have administrator privileges, you can use the Unpublish Document window to retire the document (that is, remove it from the knowledge base and the approval process) or select the approval process task to which the document will revert. If you do not have administrator privileges, the document reverts to the previous task in the approval process.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

### **Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

### **Previous Tasks**

Lists approval process tasks to which the document can revert. This field only displays if the current assignee has administrator privileges and there are multiple previous tasks in the approval process.

For each task, the Previous Tasks list displays the default assignee for the task. When you click a task name to select the task to which to unpublish the document, the Unpublish Document window refreshes so you can specify an assignee and enter a comment.

**Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm unpublishing the document to a previous approval process task. When you click OK, the Unpublish Document window closes and the unpublished document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

**Retire this Document**

Prompts you to confirm retiring the selected document. When you click OK, the Unpublish Document window closes and the product removes the document from the knowledge base and the approval process.

## Unretire Document window

The Unretire Document window opens when you click Unretire on the Update Knowledge Document window.

Use the Unretire Document window to return a retired document to the knowledge base and workflow. If you are a system administrator, you can republish the document or (when multiple tasks exist) choose the approval process task to which the document will return. Assignees without administrator privileges can return the document to the previous task in the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

**Title**

Displays the title of the document. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

**Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm unretiring the document to the selected approval process task. When you click OK, the Unretire Document window closes and the document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

### **Publish this Document**

Unretires and publishes the document. When you click Publish this Document, the product prompts you to confirm the action. Click OK to close the message and the Unretire Document window, and republish the document.

## **Update Comment window**

The Update Comment window opens when you do any of the following:

- Click Edit on the View Comment window
- Click a comment on the Comments tab of the Update Knowledge Document window
- Right-click a comment on the Comments tab of the Update Knowledge Document window, then select Edit from the shortcut menu

Use the Update Comment window to edit a comment associated with the current document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

#### **Comment**

Defines a comment that provides information about the document. This field is required.

This window contains the following buttons:

#### **Cancel**

Discards changes and opens view mode.

#### **Reset**

Returns all fields on the window or dialog to their default values.

#### **Save**

Saves the comment and opens the View Comment window.

The Update Knowledge Document window opens when you do any of the following:

- Click Save on the Create New Document window
- Right-click a document title in the Knowledge Categories pane on the Administration tab and select Open from the shortcut menu

- Click a document title in the Knowledge Categories pane on the Administration tab
- Right-click a document title in the Knowledge Document List pane on the Keyword Search tab and select Edit from the shortcut menu

Use the Update Knowledge Document window to update the content, attributes, permissions, category and document relationships, attachments, comments, and notifications for a document and to review the document's history.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments
- Notifications
- History

This window contains the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

---

Depending on the approval process task with which the document is currently associated, this window may contain the following buttons:

**Cancel**

Discards changes, closes the current window, and opens the Knowledge Document Detail window.

**Forward**

Opens the Forward Document window so you can assign the document to the analyst who will complete the next task in the approval process. When you click OK to forward the document, the Forward Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Forward button displays for all approval process tasks except the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

**Publish**

Opens the Knowledge Document Detail window and makes the document available for viewing.

**Note:** System administrators can use the Publish button at any time to bypass the approval process and immediately publish a document. Analysts working on a document can use the Publish button if the document is at the last stage of the approval process and ready to be published.

**Reject**

Opens the Reject Document window so you can reject the document, reassigning it to the previous owner and task. When you click OK to reject the document, the Reject Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Reject button displays for all approval process tasks except the first (which is, by default, Create Document) and the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves changes to the current document and (as appropriate) notifies analysts of the changes.

**Note:** The Save button is only available on the Update/Create Document window if you have write access to the document. A document is read-only when it is published (as per Administrative option) or retired, or when the document's permissions preclude you from changing it.

### **Unpublish**

Changes the status of the document from "Published" to "Unpublished", and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

### **User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

## **View Comment window**

The Comment for Document Detail window opens when you do any of the following:

- Click Save on the Create New Comment window
- Click Save on the Update Comment window
- Click Cancel on the Update Comment window
- Right-click a comment on the Comments tab of the Update Knowledge Document window and select View from the shortcut menu

Use the View Comment window to review a comment you added or edited for a document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Comment**

Displays a comment that provides information about the document you are editing, forwarding, rejecting, publishing, unpublishing, or unretiring. This field is read-only.

This window contains the following buttons:

**Close**

Closes the document, window, or dialog.

**Edit**

Opens the Update Comment window so you can modify the comment.

## Windows window

The Windows window opens when you select List All Windows from the Window menu on the Knowledge tab.

Use the Windows window to view a list of windows that Knowledge Tools currently has open and to navigate directly to a specific open window.

To move focus (that is, navigate) to a specific window, click its name on the Windows window.

This window contains the following buttons:

**Close Window**

Closes the current window.

**Refresh**

Updates the list of open windows.

## Menus

The menu bar on the Knowledge tab contains the following menus:

- File (see page 232)
- View (see page 232)
- Reports (see page 233)
- Window (see page 234)
- Help (see page 234)

**Note:** Some windows and dialogs contain menu bars with window-specific commands. For information about window- or dialog-specific menu bars, see the appropriate topics in this help system.

The Knowledge tab also includes shortcut menus that open when you right-click an item in the Category pane or the Knowledge Document List pane. For example, if you right-click a document title in the Knowledge Document List pane, the Knowledge Document List shortcut menu opens.

## File menu

The commands on the File menu let you print the current window or create a knowledge document or knowledge tree document.

This menu contains one or more of the following commands:

### **New Knowledge Document**

Opens the Create New Document window so you can define the content and attributes of a new knowledge document in the selected category.

### **New Knowledge Tree Document**

Opens the Create New Document window so you can define the content and attributes of a new knowledge tree document in the selected category.

### **Print Form**

Opens a standard Windows Print dialog so you can specify options for printing the contents of the current document, pane, window, or dialog.

In addition, the File menu on the Knowledge Categories window has the additional commands to help you manage documents and document categories.

## View menu

The commands on the View menu let you view response time statistics for Knowledge Tools, set preferences, and refresh the Knowledge Document List pane.

This menu contains one or more of the following commands:

### **Knowledge Categories**

Opens the Knowledge Categories pane which is used to manage content for each problem-solving model in the knowledge base. From the Knowledge Categories pane, users with system administrator or knowledge manager rights can:

- Create, publish, and maintain knowledge documents and knowledge tree documents
- Manage the knowledge category structure to make document access easier

### **Knowledge Report Card**

The Knowledge Report Card provides feedback to analysts, knowledge engineers, knowledge managers, and system administrators about which knowledge documents are most effective. See Knowledge Report Card for more information.

**Response Time Statistics**

Activates response time statistics reporting. Until you deactivate the function, a prompt reports Knowledge Tools response times when you perform an action. This command only displays when the function is not active.

**Preferences**

Opens the Preferences window so you can specify default preferences for various product components.

**Refresh**

Updates the current window to include the latest changes.

## Reports menu

The commands on the Reports menu let you generate summary and detail reports for the documents currently displayed in the list pane. On the Administration tab, the reports menu only displays for Tree pane selections for which reporting information exists (for example, events and macros panes, notifications panes, and application data panes).

This menu contains one or more of the following commands:

**Summary**

Generates and displays a report of summary information about each item in the current result set. This report contains the following information:

- Issue number
- Status
- Category
- Open date
- The name of the user who opened the issue
- Priority
- Summary

Click Print to open a Windows Print dialog so you can print the report.

**Detail**

Generates and displays a report of detailed information about each document in the current result set. This report lists all of the attributes defined for each document in the result set. Click Print to open a Windows Print dialog so you can print the report.

## Window menu

The commands on the Window menu let you manage which windows and dialogs display on your screen. This menu contains one or more of the following commands:

### **Close All Popups**

Closes all currently open Knowledge Tools windows except the main window.

### **List All Windows**

Opens the Windows window, which lists all currently open Knowledge Tools windows. Click a window name to move focus to the selected window.

### **View Main Page**

Moves focus to the main Knowledge Tools window. This command only displays on windows other than the main Knowledge Tools window.

## Help menu

This menu contains one or more of the following commands:

### **Knowledge Tools Help**

Opens a window that provides online help information about the main interface window. The Contents, Index, and Search tabs appear on the left, allowing you to navigate the help system.

### **Help on This Window**

Opens a window that provides online help information about the currently active Knowledge Tools pane or window.

### **Power User Tips**

Opens a window that provides help information such as keyboard shortcuts for expert Knowledge Tools users.

### **Screen Reader Usage**

This Help menu item opens a window explaining how to use a Screen Reader with Knowledge Tools.

### **Support for Knowledge Tools**

Opens the CA support web site for Knowledge Tools.

### **Operations Info**

Typically, this Help menu command displays a window showing information about your product installation, such as hours of operation and contact information.

If you want to customize this file for your installation, please copy it to:  
\$NX\_ROOT/site/mods/www/html/web/analyst/about.html-

and then make the required changes.

### **About Knowledge Tools**

Opens the About window, which provides information about this version of the product, third party notices, technical support information, and system information. Click Done to close the About window.

displayed on this window is contained in the file:  
\$NX\_ROOT/bopcfg/www/html/web/analyst/about.html

## **Default Shortcut Menu**

The default shortcut menu opens when you right-click an empty area in any tab.

This menu contains one or more of the following commands:

### **About**

Opens the About window, which provides information about this version of the product, third party notices, technical support information, and system information. Click Done to close the About window.

### **Help on Main Window**

Opens a window that provides online help information about the main interface window. The Contents, Index, and Search tabs appear on the left, allowing you to navigate the help system.

### **Help on This Window**

Opens a window that provides online help information about the currently active Knowledge Tools pane or window.

### **Print Form**

Opens a standard Windows Print dialog so you can specify options for printing the contents of the current document, pane, window, or dialog.

### **Refresh**

Updates the current window to include the latest changes.

## Knowledge Document List shortcut menu

The Knowledge Document List shortcut menu opens when you right-click the Title for a document in the Knowledge Document List pane on the Knowledge tab or the Keyword Search tab.

There is an administrative shortcut menu available for the Knowledge Document List under the Administration tab > Knowledge Tools > Knowledge Categories. See the section below.

**Note:** The default Knowledge Tools shortcut menu opens when you right-click outside the area served by a function-specific shortcut menu.

This menu contains one or more of the following commands:

### **View**

Opens the selected document in the Knowledge Document window or the Knowledge Tree Document window.

### **Edit**

Opens the selected document in the Update Knowledge Document window.

### **Refresh**

Refreshes the Knowledge Document List.

### **Print Form**

Prints the currently displayed form.

### **Help on This Window**

Opens the help topic for the current window.

The following additional shortcut commands are available on the Knowledge Document List of the Knowledge Categories window. This window is accessed from Administration tab > Knowledge > Knowledge Categories. The following shortcut commands allow the administrator to manage documents:

### **User View**

Opens the Preview window, where you can view the document as it will appear at runtime.

### **New Knowledge Document**

Opens the Create New document window, allowing you to create a new knowledge document.

### **New Knowledge Tree Document**

Opens the Create New Tree Document window.

**Delete Selected Document**

Will delete the selected document. A prompt will appear confirming the delete request.

**Note:** If the document is also contained in another Knowledge Category, it will be deleted in that category as well.

**Delete All Documents Retrieved**

Will delete all the documents in the current list. A prompt will appear confirming the delete request.

**Note:** If any documents in the list are contained in other Knowledge Categories, they will be deleted in those categories as well.

## Procedures

The following topics provide procedures for using the Knowledge tab to work with knowledge documents and knowledge tree documents in the knowledge base.

### Work with Bookmarks

The Bookmark feature reduces the time you spend looking for frequently referenced documents by storing links to them in the My Bookmarks folder. When you click My Bookmarks in the Category pane on the Knowledge tab, the list of bookmarked documents displays in the Knowledge Document List pane.

The following topics contain procedures for working with bookmarks:

Bookmark a Document (see page 237)

Access a Bookmarked Document (see page 238)

Delete a Bookmark (see page 238)

### Bookmark a Document

To bookmark a document for quicker access, follow these steps:

1. Open the document.
2. Click Add Bookmark on the Page Options menu.

The Remove Bookmark button replaces Add Bookmark on the Page Options menu and the product adds the document to the My Bookmarks folder.

**Note:** Users logged in as Guest cannot create or delete bookmarks or access the My Bookmarks folder.

## Access a Bookmarked Document

To access a bookmarked document, follow these steps:

1. Select My Bookmarks from the Category pane on the Knowledge tab.  
The Knowledge Document List pane refreshes to display all bookmarked documents.
2. (Optional) Use the Knowledge Search pane to specify criteria by which to filter the result list.
3. Click the appropriate document's title in the Knowledge Document List pane.  
The document opens.

## Delete a Bookmark

To delete a bookmark, follow these steps:

1. Select My Bookmarks from the Category pane.  
The Knowledge Document List pane refreshes to list bookmarked documents.
2. Click the title of the document whose bookmark you want to delete.  
The document opens.
3. Click Remove Bookmark on the Page Options menu.  
The product deletes the bookmark and the Add Bookmark button replaces the Remove Bookmark button on the Page Options menu. When you select My Bookmarks from the Category pane, the document no longer appears on the list.

**Note:** Users logged in as Guest cannot create or delete bookmarks or access the My Bookmarks folder.

## Work with Documents

The following topics contain procedures for working with knowledge documents and knowledge tree documents:

- Access a Bookmarked Document (see page 238)
- Add a Comment to a Document (see page 239)
- Bookmark a Document (see page 237)
- Check Spelling in a Document (see page 243)
- Complete the Solution Survey for a Document (see page 244)
- Delete a Bookmark (see page 238)
- Generate Reports (see page 251)
- Open a Knowledge Document (see page 252)
- Print a Document (see page 253)
- Send a Document in Email (see page 257)
- View a Document (see page 260)

### Add a Category Link to a Document

To add a category link to a document, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Right-click the category to link to the document, then select Link this Category from the shortcut menu.

The product adds the selected category path to the Category Links list and to the current document. At runtime, the link displays in the document under the "Related Categories" heading.

### Add a Comment to a Document You are Editing

To add a comment to a document you are editing, follow these steps:

1. Open the document for editing.
2. Click the Comments tab.
3. Click Add Comment.  
The Create New Comment window opens.
4. Enter a brief comment in the Comment box.
5. Click Save.

The Create New Comment window closes and the View Comment window opens so you can review your comment.

6. Do one of the following:

- Click Close Window.

The View Comment window closes. Select Refresh from the View menu to refresh the Comments tab.

- Click Edit.

The View Comment window closes and the Update Comment window opens so you can change the comment.

### Add a Comment to a Document You are Viewing

To add a comment to a document you are viewing, follow these steps:

1. View the document.
2. Locate the Comment box on the document window.
3. Enter your user name (that is, the ID with which you log into the product) in the Name box.
4. Enter your email address in the Email box.
5. Enter your feedback in the Comment box.
6. Click Submit.

The product displays an informational message and the Comment box becomes read-only. When you next access the document, your user ID, email address, and comment display under the Comments heading.

### Add a Contact to the Notification List

You can specify contacts to notify by email of events such as changes in a document's content or status. To add a contact to a document's notification list, follow these steps:

1. Open the document for editing.
2. Click the Notifications tab.
3. Click Add Notification.

The Create New Notification window opens.

4. Do one of the following to define the contact to notify in the User Name box:
  - Enter the name of the contact in "last name, first name" format.
  - Click  to open the Contact Search window so you can locate and select a contact.

- 
- Enter one or more characters of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one entry matches the characters you typed, the product automatically enters that name in the field.
5. (Optional) Enter an alternate email address to which to send notifications in addition to the address associated with the specified contact in the Alternate Email box.
  6. Click Save.

The Create New Notification window closes and the View Notification window opens so you can review your settings.
  7. Do one of the following:
    - Click Close Window.

The View Notification window closes. Select Refresh from the View menu to refresh the Notifications tab.
    - Click Edit.

The View Notification window closes and the Update Notification window opens so you can change the user name or alternate email address.

### Add a Document Link to a Document

To add a document link to a document, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Select the category that contains the document for which you want to add a link from the Categories list.

The Documents list refreshes to display the ID numbers and titles of documents in the selected category.

4. Right-click the ID number of the document to link, then select Link this Document from the shortcut menu.

The product adds the selected document to the Document Links list and to the current document. At runtime, the link displays in the document under the "See Also" heading.

### Add a URL Link to a Document

To add a URL link to a document, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Type the fully-qualified URL (for example, **http://www.ca.com**) in the field provided, then click Add URL Link.

The Attachments list refreshes to include the URL. At runtime, the link displays in the document under the "Attachments" heading. When a user clicks the link, the associated resource opens for viewing in a separate browser window.

### Attach a File to a Document

To add a file attachment to a document, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Navigate to the folder that contains the file you want to attach in the Repositories list.

The Files list refreshes to display the ID numbers and names of files in the selected folder.

(Optional) Right-click the ID number of a file, then select View from the shortcut menu to open the selected file in an appropriate program so you can preview it before attaching it to the document.

4. Right-click the ID number of the file to attach, then select Attach this File from the shortcut menu.

The Attachments list refreshes to list the path and name of the file attachment. At runtime, file attachments are typically listed under the "Attachments" heading in the document. When a user clicks the link to a file attachment, the attachment opens for viewing in an appropriate program.

---

## Check Spelling in a Document

To check spelling in a document, follow these steps:

1. Open the document for editing.
2. Click the Spell Check button.

**Note:** The Spelling button is only available for the Resolution section when the HTML Source option is selected.

The product scans the document and opens the Spell Check Results window.

- If the product encounters no unrecognized words, it closes the Spell Check Results window. The spelling check is complete.
  - If the product encounters unrecognized words, it displays the first unrecognized word in the Not in Dictionary field on the Spell Check Results window. Continue with Step 3.
3. Do one of the following:
    - Enter a replacement for the unrecognized word in the Change To box.
    - Select one of the suggested replacements for the unrecognized word from the Suggestions list.
    - Continue with Step 4 without specifying an alternative to the unrecognized word.
  4. Do one of the following:
    - Click Change to replace the current occurrence of the unrecognized word with the word you entered in the Change To box or selected from the Suggestions list.
    - Click Change All to replace all occurrences of the unrecognized word with the word you entered in the Change To box or selected from the Suggestions list.
    - Click Ignore to leave the current occurrence of the unrecognized word unchanged.
    - Click Ignore All to leave all occurrences of the unrecognized word unchanged.

The Spell Check Results window displays the next unrecognized word. If there are no more unrecognized words in the document, the Spell Check Results window closes.

## Complete the Solution Survey for a Document

You can use the Solution Survey box in a document to open an issue or request and to provide information that the product uses to calculate the document's FAQ rating.

To complete the solution survey for the currently open document, follow these steps:

1. (Optional) Select an option in the Solution Survey box to open an issue or request.
2. Select one of the following options in the Solution Survey box to rate the effectiveness of the current document in addressing your problem:

### **Very helpful**

Indicates that the document solved the problem or provided all of the information necessary to solve the problem.

### **Somewhat helpful**

Indicates that the document provided most of the information necessary to solve the problem.

### **Not helpful at all**

Indicates that the document provided very little or none of the information necessary to solve the problem.

3. Click Submit.

The document refreshes and the Solution Survey box becomes read-only. If you selected an option other than No in Step 1, the Create New Request window opens.

**Note:** If the document helped you solve your problem or answer your question and you do not want to complete the solution survey, click the Yes (Close) button. The product closes the document and adds it to the solution count used to calculate FAQ ratings.

---

## Create a Knowledge Document

**Note:** Only an Administrator with Administration rights can create a Knowledge Document.

To create a knowledge document, follow these steps:

1. Select the category in which to add the new document from the Category pane on the Knowledge tab.

The Knowledge Document List pane refreshes to display documents in the selected category.

Select New Knowledge Document from the File menu.

The Create New Document window opens.

2. Complete the fields in the Content tab as appropriate.
3. Click Edit Resolution.

The HTML Editor opens.

4. Use the HTML Editor to design the body (that is, the resolution) of the document, then click OK to save the resolution and close the HTML Editor.
5. (Optional) Click Spell Check to check spelling in the content you entered.
6. Click Save.

The Create New Document window closes and the Update Knowledge Document window opens.

7. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.
8. Complete the fields on the remaining tabs on the Update Knowledge Document window as appropriate.
9. Click Save when you finish editing the document.
10. Do one of the following:
  - Click Forward to advance the document to the next approval process task.
  - Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
  - Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

## Create a Knowledge Tree Document

To create a knowledge document, follow these steps:

1. Select the category in which to add the new document from the Category pane on the Knowledge tab.

The Knowledge Document List pane refreshes to display documents in the selected category.

Select New Knowledge Tree Document from the File menu on the Keyword Search tab.

The Create New Document window opens.

2. Complete the fields in the Content tab as appropriate.
3. (Optional) Click Spell Check to check spelling in the content you entered.
4. Click Save.
5. The Create New Document window closes and the Update Knowledge Document window opens.
6. Click Design Tree.

The DT Builder opens.

7. Create the knowledge tree, then click Save and Close to save the tree design and close the DT Builder.
8. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.
9. Complete the fields on the remaining tabs on the Update Knowledge Document window as appropriate.
10. Click Save when you finish editing the document.
11. Do one of the following:
  - Click Forward to advance the document to the next approval process task.
  - Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
  - Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

### Delete a Comment from a Document

To delete a comment from a document, follow these steps:

1. Open the document for editing.
2. Click the Comments tab.
3. Right-click the comment, then select Delete from the shortcut menu.

An informational message displays.

4. Click OK.

The informational message closes and the product deletes the contact from the Comment list.

### Delete a Contact from the Notification List

To delete a contact from a document's notification list, follow these steps:

1. Open the document for editing.
2. Click the Notifications tab.
3. Right-click the user name or alternate email of the contact to delete, then select Delete from the shortcut menu.

An informational message displays.

4. Click OK.

The informational message closes and the product deletes the contact from the notification list.

### Delete a File Attachment from a Document

To remove an attachment from a document, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Right-click the file to remove from the document in the Attachments list, then select Remove from the shortcut menu.

A confirmation message displays.

4. Click OK.

The confirmation message closes and the product removes the selected attachment from the Attachments list and the document.

## Edit a Comment in a Document

To edit a comment associated with a document, follow these steps:

1. Open the document for editing.
2. Click the Comments tab.
3. Right-click the comment to edit, then select Edit from the shortcut menu.

The Update Comment window opens.

Edit the comment as appropriate, then click Save.

The Update Comment window closes and the View Comment window opens so you can review your changes.

4. Do one of the following:

- Click Close Window.

The View Comment window closes and the Comments tab refreshes.

- Click Edit.

The View Comment window closes and the Update Comment window opens so you can change the comment definition.

## Edit a Contact in the Notification List

To edit a contact in a document's notification list, follow these steps:

1. Open the document for editing.
2. Click the Notifications tab.
3. Right-click the alternate email address or the user name of the contact to edit in the Document Notification List, then select Edit from the shortcut menu.

The Update Notification window opens.

(Optional) Do one of the following to define the contact to notify in the User Name box:

- Enter the name of the contact in "last name, first name" format.
- Click  to open the Contact Search window so you can locate and select a contact.
- Enter one or more characters of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one entry matches the characters you typed, the product automatically enters that name in the field.

4. (Optional) Enter an alternate email address to which to send notifications in addition to the address associated with the specified contact in the Alternate Email box.

5. Click Save.

The Update Notification window closes and the View Notification window opens so you can review your settings.

6. Do one of the following:

- Click Close Window.

The View Notification window closes and the Notifications tab refreshes.

Click Edit.

The View Notification window closes and the Update Notification window opens so you can change the user name or alternate email address.

## Edit a Document from the Knowledge Tab

To edit a document, follow these steps:

1. Select the category in which the document to edit resides from the Category pane on the Knowledge tab.

The Knowledge Document List pane refreshes to display documents in the selected category.

2. Right-click the title of the document to edit, then select Edit from the shortcut menu.

The Update Knowledge Document window opens.

**Note:** If the document has been published, you may need to unpublish it before making changes.

3. (Optional) Complete or change the fields on the various tabs as appropriate.

4. (Optional) Do one of the following, as appropriate:

- For a knowledge document, click Edit Resolution on the Content tab to open the HTML Editor so you can modify the body (that is, the resolution) of the document. Click OK to save your changes and close the HTML Editor.

- For a knowledge tree document, click Design Tree on the Content tab to open the DT Builder so you can edit the knowledge tree. Click Save and Close to save the tree design and close the DT Builder.

5. (Optional) Click Spell Check to check spelling in the content you entered.

6. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.
7. Click Save when you finish editing the document.  
The product saves your changes.
8. Do one of the following:
  - Click Forward to advance the document to the next approval process task.
  - Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
  - Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

### Filter the Knowledge Document List

To specify criteria by which to determine which documents from the current category display in the Knowledge Document List pane, follow these steps:

1. Select the category in which to filter documents from the Category pane.

The Knowledge Document List pane refreshes to display all of the documents in the selected category.

**Note:** To filter all the documents in the knowledge base, select the TOP category.

(Optional) Enter a phrase by which to filter documents to retrieve in the Search box.

2. (Optional) Click Advanced Search to display the advanced search fields, then complete the fields as appropriate.

The more criteria you specify, the fewer results will return when you apply the filter.

3. Click Search.

The Knowledge Document List pane displays your filtered results.

---

## Forward a Document

When you complete an approval process task for a document that is not yet at the last stage of the approval process, you can forward it to the next task.

To forward a document to the next approval process task, follow these steps:

1. Open the document for editing.
2. Click Forward on the Update Knowledge Document window.

**Note:** The Forward button is only available if the document is not at the final stage of the approval process.

The Forward Document window opens.

3. (Optional) Specify a contact to have responsibility for the document for the duration of the next approval process task. Do one of the following:
4. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

If you do not select an alternate assignee, the product associates the document with the assignee defined in the approval process template.

5. (Optional) Enter a brief comment for the document in the Comment box.
6. Click OK.

A confirmation message displays.

7. Click OK.

The confirmation message and the Forward Document window close, and the product forwards the document to the next approval process task and assignee.

## Generate Reports

To generate a report, follow these steps:

1. Choose Reports from the Admin menu.

The Reports dialog opens.

2. Click the link corresponding to the report you want to generate.

A specific report dialog opens.

**Note:** When you click the Noise Words, Synonyms, Special Terms, or Unpublished Documents link on the Reports dialog, the product generates and displays the corresponding report without displaying an intermediate dialog.

3. Complete the fields on the report dialog as appropriate, then click Go.

The product generates and displays the selected report.

## Open a Document from the Knowledge Tab

To open a knowledge document, follow these steps:

1. Select the folder, category, or subcategory in which the document resides from the Category pane on the Knowledge tab.

The Knowledge Document List pane refreshes to display the contents of the selected folder or of the selected category and its subcategories.

2. (Optional) Use the Knowledge Search pane to specify criteria with which to refine the results list.

3. Do one of the following:

- To open the document for editing, right-click its title in the Knowledge Document List pane and select Edit from the shortcut menu.

The selected document opens in the Update Knowledge Document window.

- To open the document as it will display to users at runtime, click its title in the Knowledge Document List pane.

The selected document opens in the Knowledge Document window or the Knowledge Tree Document window, as appropriate.

## Preview a Document

To preview a document as it will display to users at runtime so you can verify content and design before you publish the document, follow these steps:

1. Do one of the following, as appropriate:

- On the Knowledge tab or the Keyword Search tab, click on the title of the document to view it in the User View.

On the Administration tab, click the title of the document.

The document opens Update Knowledge Document window.

2. Click *User View*.

The document opens in the Preview window.

3. (Optional) Select Print from the Page Options menu on the right side of the document to open a standard Windows Print dialog so you can print the document.

4. Click .

The Preview window closes.

## Print a Document

To print a document, follow these steps:

1. Do one of the following, as appropriate:
  - On the Knowledge tab or the Keyword Search tab, click the title of the document in the Knowledge Document List pane.
  - On the Administration tab, right-click the title of the document in the Knowledge Categories pane, then select *User View* from the shortcut menu.

The document opens.

2. Click Print on the Page Options menu.

A standard Windows Print dialog opens.

3. Specify the appropriate print settings, then click Print.

The Print dialog closes and the document prints.

## Publish a Document

When you are ready to add a document to the knowledge base, you can “publish” it from the Update Knowledge Document window. Analysts and knowledge engineers can publish documents when they are at the last stage of the approval process. Knowledge managers and system administrators can publish documents at any stage of the approval process.

To publish a document, follow these steps:

1. Open the document for editing.
2. Click Publish.

A confirmation message displays.

3. Click OK.

The confirmation message and the Update Knowledge Document window close, and the Knowledge Document Detail window opens. The product adds the document to the knowledge base.

## Reject a Document

The approval process determines the consecutive tasks and task owners through which a document progresses during its life cycle. When a document arrives in your Inbox in the Knowledge Documents folder on the Service Desk tab (indicating that you are the document's owner for a specific workflow task), you can do one of the following:

- Accept the task by editing the document and then publishing it or forwarding it to the next workflow task.

**Note:** By default, all users with full permissions may edit documents. However, the system administrator can specify in the Approval Process Settings pane on the Administration tab that only an assignee, the document owner, a system administrator, or a knowledge manager may edit documents.

- Reject the task by clicking Reject on the Update Knowledge Document window to revert the document to a previous approval process task and owner. You might reject a task, for example, if the forwarding analyst did not complete a prerequisite task or if you are no longer responsible for the subject matter associated with the document.

To reject a document and return it to a previous approval process task, follow these steps:

1. Click  to open the Knowledge Documents branch of the scoreboard in the left pane of the Service Desk tab.
2. When the Inbox branch displays a number other than zero, the knowledge base contains one or more documents awaiting your attention.
3. Click the Inbox branch.

The Knowledge Document List pane refreshes to list documents in your Inbox.

4. Right-click the title of the appropriate document in the Knowledge Document List pane, then select Edit from the shortcut menu.

The Update Knowledge Document window opens.

5. Click Reject.

The Reject Document window opens.

6. Do one of the following:
  - If you are not the current assignee or a system administrator or there is only one previous workflow task, you can choose an owner for the task and (optionally) enter a comment.
    - Select the name of a contact to assign the document to from the Assignee list, or click  to open the Contact Search window so you can search for and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
  - If you are the current assignee or a system administrator and there are multiple previous workflow tasks, you can choose the task to which the document will revert.
    - Click the name of a previous task to which to assign the rejected document. The Reject Document window refreshes.
    - Select the name of a contact to assign the document to from the Assignee list, or click  to open the Contact Search window so you can search for and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
7. Click OK.

The confirmation message and the Reject Document window close and the rejected document appears in the specified assignee's Inbox in the Knowledge Document folder on the Service Desk tab.

### Remove a Category Link from a Document

To remove a category link, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Right-click the category link to remove in the Category Links list, then select Remove this Category from the shortcut menu.

**Note:** You cannot remove the link to the primary category.

The product removes the selected category link from the Category Links list and the document.

### Remove a Document Link from a Document

To remove a document link, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Right-click the document link to remove in the Document Links list, then select Remove this Link from the shortcut menu.

The product removes the selected document link from the Document Links list and the document.

### Remove a URL Link from a Document

To remove a document link, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Right-click the URL link to remove in the Attachments list, then select Remove from the shortcut menu.

An informational message displays.

Click OK.

The informational message closes and the product removes the selected document link from the Attachments list and the document.

### Retire a Document

When a published document reaches its expiration date, the product typically retires it (that is, removes the document from the knowledge base and the approval process).

To retire a document before its expiration date, follow these steps:

1. Open the document for editing.
2. Click Unpublish.

The Unpublish Document window opens.

3. Click Retire This Document.

A confirmation message displays.

4. Click OK.

The confirmation message and the Unpublish Document window close, and the product removes the document from the knowledge base and the workflow.

## Send a Document in Email

To email the current document to one or more recipients, follow these steps:

1. View the document.
2. Click Email on the Page Options menu.

The Email Document window opens.

3. Complete the fields on the Email Document window as appropriate.
4. Click OK.

The Email Document window closes and the product sends your email to the specified recipients.

## Set the Primary Category for a Document

To specify a document's primary category, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.

The Primary Category field at the top of the tab displays the current primary category path. For example, TOP>Email.

3. (Optional) If the Category Links list does not display the category you want to set as primary, right-click the category in the Categories list and select Link this Category from the shortcut menu.

The product adds the selected category path to the Category Links list and to the current document.

4. Right-click the name of the category to set as the document's primary category in the Category Links list, then select Set as Primary Category from the shortcut menu.

A confirmation message displays.

5. Click OK.

The confirmation message closes, and the Primary Category field refreshes to display the updated information.

## Unpublish a Document

After a document has been published, a system administrator or a user with full permissions can unpublish it, thereby removing it from the knowledge base and returning it to the approval process.

To unpublish a document, follow these steps:

1. Open the document for editing.
2. Click Unpublish.

The Unpublish Document window opens.

3. Do one of the following, as appropriate:
  - If you are a system administrator, you can retire the document, thereby removing it from the knowledge base and the approval process. To do so, click Retire this Document. A confirmation message displays.
  - If you are a system administrator and there are multiple approval process tasks to which the document might revert, you can select the task to which to assign the document, select an assignee, and (optionally) enter a comment:
    - Click the name of a previous task to which to assign the unpublished document. The Unpublish Document window refreshes.
    - Select the name of a contact to assign the document to from the Assignee list, or click  to open the Contact Search dialog so you can locate and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
  - If you are a knowledge engineer or analyst, you can choose an assignee for the task and (optionally) enter a comment:
    - Select the name of a contact to assign the document to from the Assignee list, or click  to open the Contact Search dialog so you can locate and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
4. Click OK.

The confirmation message and the Unpublish Document window close, and the product retires the document or assigns it to the specified task and owner, as appropriate.

## Unretire a Document

When a published document reaches its expiration date, the product typically retires it (that is, removes the document from the knowledge base and the approval process). A system administrator or a user with full permissions can unretire or republish the document to return it to the approval process and the knowledge base.

To unretire a document, follow these steps:

1. Open the document for editing.
2. Click Unretire.

The Unretire Document window opens.

3. Do one of the following, as appropriate:
  - If you are a system administrator, you can republish the document. To do so, click Publish this Document. A confirmation message displays.
  - If you are a system administrator and there are multiple approval process tasks to which the document might revert, you can choose the task to which to assign the document, choose an assignee, and (optionally) enter a comment:
    - Click the name of a previous task to which to assign the unretired document. The Unretire Document window refreshes.
    - Select the name of a contact to assign as the owner for the document from the Assignee list, or click  to open the Assignee List dialog so you can search for and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
  - If you are a knowledge engineer or analyst, you can choose an assignee for the task and (optionally) enter a comment:
    - Select the name of a contact to assign as the owner for the document from the Assignee list, or click  to open the Assignee List dialog so you can search for and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
4. Click OK.

The confirmation message and the Unretire Document window close, and the product assigns the document to the specified task and owner and returns the document to the knowledge base and the workflow.

## View a Document from the Knowledge Tab or the Keyword Search Tab

To view a document as it displays to users at runtime, click its title in the Knowledge Document List. The selected document opens in the Knowledge Document window or the Knowledge Tree Document window, as appropriate.

## View Document History

To view the history of a document, follow these steps:

1. Open the document for editing.
2. Click the History tab.

The History tab displays all actions performed on the current document, with the most recent actions listed first. The information on the History tab is read-only.

3. (Optional) Click Show Filter to display controls with which you can specify criteria for filtering the list of events displayed on the History tab. When you specify filtering criteria and click Search, the Event List refreshes to display only events that match your criteria.

## Work with the Knowledge Tab

The following topics contain procedures for using the Knowledge tab to search for, view, and work with knowledge documents and knowledge tree documents:

- Browse the Category Pane (see page 261)
- Browse the Knowledge Document List Pane (see page 261)
- Hide or Show Document Details (see page 262)
- Open a Knowledge Document (see page 252)
- Retrieve Documents by Category Path (see page 262)
- Search for Document (see page 263)
- Search for Documents Using Advanced Criteria (see page 264)
- Set Preferences for the Knowledge Document List (see page 265)
- Sort Documents in the Knowledge Document List Pane (see page 266)
- View New Documents (see page 266)
- View Response Time Statistics (see page 232)

---

## Browse the Category Pane

To navigate the Category pane on the Knowledge tab, click a folder or category name.

When you click a folder or category name, the Knowledge Document List pane lists documents that reside in the currently selected folder or category and its subcategories. When you click the TOP category, the Knowledge Document List pane lists all of the documents in the knowledge base.

To expand a category or subcategory and view its subcategories, click . To close a category or subcategory, click .

**Note:** You can also click the links at the top of the Knowledge Document List pane (for example, [Top](#) > [Insurance](#) > [Institutional](#)) to return to a previous level in the category hierarchy.

## Browse the Knowledge Document List Pane

When you select a folder or category from the Category pane or you perform a search in the Knowledge Search pane, the Knowledge Document List pane displays a list of documents that reside in the selected folder or category and its subcategories or that result from the search.

To open a document, click its title in the Knowledge Document List pane or right-click the document name and select a command from the shortcut menu.

If the Knowledge Document List pane contains more documents than can display on a single page, you can use the following browse links at the top of the pane to navigate the list:

<<

Displays the first page of documents.

<

Displays the previous page of documents.

>

Displays the next page of documents.

>>

Displays the last page of documents.

### List All

Displays all of the documents in a single scrollable list.

An indicator at the top of the Knowledge Document List pane displays your current position and the total number of documents in the list.

## Hide or Show Document Details

You can select whether detailed information displays in the Knowledge Document List pane on the Knowledge tab. By default, the Knowledge Document List pane displays the following information:

- Title (displays as the document heading in the Title column)
- Summary (displays beneath the document heading in the Title column)
- Document ID (displays to the right of the document heading in the Attributes column)
- Modify Date (displays to the right of the document heading in the Attributes column)

To hide or show the detailed information on the Knowledge Document List pane, follow these steps:

1. Select Preferences from the View menu.  
The Preferences window opens.
2. Do one of the following:
3. To hide the detailed information on the Knowledge Document List pane so more documents can display on the pane simultaneously, clear the Show Document List Details check box.
  - To show the detailed information on the Knowledge Document List pane, select the Show Document List Details check box.
4. Click Save.  
The Preferences window closes and the Preferences Detail window opens.
5. Click Close Window.  
The Preferences Detail window closes.

## Retrieve Documents by Category Path

To retrieve documents in a specific category path, follow these steps:

1. Click Advanced Search in the Knowledge Search pane.  
The Knowledge Search pane expands to display advanced search fields.
2. Click  **Category**.  
The Category Selection window opens.
3. Navigate to and select the category or subcategory for which to list documents.  
The Category Selection window closes and the Category box in the Knowledge Search pane refreshes to include the selected path.

4. Repeat Steps 2 and 3 for each category path for which to retrieve documents.
5. (Optional) Specify other search criteria as appropriate.
6. Click Search.

The product performs the specified search and hides the advanced search fields. The Knowledge Document List pane refreshes to display the search results.

## Search for Documents

To search the knowledge base for documents, follow these steps:

1. Depending upon the default search type selected from the Search Type list on the Preferences window, enter the appropriate search criteria in the Search box on the Knowledge Search pane:
  - If Keyword Search is selected from the Search Type list, enter keywords for which to search in the Search box. Separate each keyword with a space or a comma.
  - If Natural Language Search is selected from the Search Type list, enter a question (for example, "How do I install a network printer?") in the Search box.
2. Do one of the following:
  - To search only in the category or subcategory selected in the Category pane, select the Search Only in '*category*' option.
  - To search in all categories and subcategories, select the Search All Categories option.

**Note:** These options do not display on the Knowledge tab when you select the TOP category or the My Bookmarks or New Documents folder from the Category pane.

3. Click Search.

The product searches the knowledge base for documents that match your search criteria and displays the results in the Knowledge Document List pane.

## Search for Documents Using Advanced Criteria

When you click Advanced Search in the Knowledge Search pane of the Knowledge tab, the pane expands to display advanced search fields that you can use to specify criteria with which to narrow a search of documents in the knowledge base and to filter the results of that search.

To use the advanced search fields to refine search results, follow these steps:

1. Depending upon the default search type selected from the Search Type list on the Preferences window, enter the appropriate search criteria in the Search box on the Knowledge Search pane:
  - If Keyword Search is selected from the Search Type list, enter keywords for which to search in the Search box. Separate each keyword with a space or a comma.
  - If Natural Language Search is selected from the Search Type list, enter a question (for example, "How do I install a network printer?") in the Search box.
2. Do one of the following:
  - To search only in the category or subcategory selected in the Category pane, select the Search Only in '*category*' option.
  - To search in all categories and subcategories, select the Search All Categories option.

**Note:** These options do not display on the Knowledge tab when you select the TOP category or the My Bookmarks or New Documents folder from the Category pane.

3. Click Advanced Search.

The Knowledge Search pane expands to display advanced search fields.

4. Complete advanced search fields as appropriate.
5. Click Search.

The product searches the knowledge base for documents that match your search criteria and displays the results in the Knowledge Document List pane.

## Set Preferences for the Knowledge Document List

To set preferences for the contents of the Knowledge Document List on the Knowledge tab, follow these steps:

1. Select Preferences from the View menu.

The Preferences window opens.

2. Locate the Knowledge Document List Settings options.
3. (Optional) Select the number of documents to display on each page of the document list from the Documents Per Page list.
4. (Optional) Do one of the following to specify whether details display for each document in the Knowledge Document List:
  - Select the Show Document List Details check box to display the title and additional attributes (for example, Summary, Status, Modify Date, and Owner) for each document.
  - Clear the Show Document List Details check box to display only the title for each document.

5. Click Save.

The Preferences window closes and the Preferences Detail window opens so you can review your settings.

6. Do one of the following:

- Click Close Window.

The Preferences Detail window closes and the Knowledge Document List pane refreshes to reflect your settings. Select Refresh from the View menu to update the Knowledge Document List to reflect your settings.

- Click Edit.

The Preferences Detail window closes and the Preferences window opens so you can change your settings.

## Sort Documents in the Knowledge Document List Pane

To set the order in which documents display in the Knowledge Document List pane, select one of the following sort options from the Order By list:

### **FAQ Rating**

Sorts documents based on their FAQ rating, which considers how often the document is accessed, how helpful it has been to users, and its age. Documents with the highest FAQ ratings are listed first. This is the default sort order.

### **Hits**

Sorts documents by the number of times users have accessed them, with the most frequently accessed documents listed first.

### **Modify Date**

Sorts documents by the date on which they were last modified, with the most recently modified documents listed first.

### **Solution Count**

Sorts documents by the number of issues or requests they have resolved, as reported by users. Documents with the highest solution counts are listed first.

When you change the Order By selection, the Knowledge Document List pane refreshes to reflect the new sort order.

## View New Documents

The New Documents folder in the Category pane on the Knowledge tab contains documents published during the interval specified in the FAQ Options pane on the Administration tab (the default interval is five days).

**Note:** The product also lists documents in the New Documents folder with their parent category.

To view documents in the New Documents folder, follow these steps:

1. Click New Documents in the Category pane on the Knowledge tab.

The Knowledge Document List pane refreshes to display a list of documents in the New Documents folder.

2. Click the title of a document to view.

The document opens.

---

To set Unicenter SD to report information about its response time when performing various functions, follow these steps:

1. Select Response Time Statistics from the View menu on the Knowledge tab.

An informational message displays.

2. Click OK.

The informational message closes.

3. Work with Unicenter SD as you typically do.

Each time the product completes an action, a message containing the some or all of the following information displays:

#### **Request Time**

Displays the time (in hh:mm:ss format) and time zone at which you began the action for which statistics are reported.

#### **Load Start**

Displays the time (in hh:mm:ss format) and time zone at which the product began loading the document, window, or dialog that is the target of the action. If available, this statistic includes the elapsed time (in seconds) since your original request.

#### **Load Complete**

Displays the time (in hh:mm:ss format) and time zone at which the product finished loading the document, window, or dialog that is the target of the action. If available, this statistic includes the elapsed time (in seconds) since load start.

#### **User Resp Time**

Displays the total elapsed time (in seconds) from your original request to load complete.

4. Do one of the following:

- Click OK.

The message closes and the product continues reporting response time statistics.

- Click Cancel.

The message closes and the product deactivates the Response Time Statistics function.



# Chapter 8: Keyword Search Tab

---

The Keyword Search tab is the main interface for providing Knowledge Tools users with access to documents in the knowledge base to quickly resolve issues. From the Knowledge tab, users can:

- Perform natural language (NLS) and keyword searches of the knowledge base
- Filter and sort documents
- Open and work with information provided by knowledge documents and knowledge tree documents

Users with analyst, knowledge engineer, knowledge manager, or system administrator rights can access the Administration tab, which is the centralized console for managing content for each problem-solving model in the knowledge base.

This tab has the following components:

## **Menu Bar**

The menu bar on the Keyword Search tab provides access to the File, View, Window, and Help menus.

## **Knowledge Search pane**

The Knowledge Search pane contains controls with which you can specify criteria for and initiate a basic or advanced search of the knowledge base. The pane occupies the entire Keyword Search tab until you perform a search, then it displays above the Knowledge Document List pane when you click Show Filter. Click Show Filter to display the search fields; click Hide Filter to close the Knowledge Search pane. When you click Search, the Knowledge Document List pane opens and lists documents that match your search criteria.

## **Knowledge Document List Pane**

The Knowledge Document List pane displays documents that match the criteria specified in the Knowledge Search pane, or documents for the selected scoreboard item. Use the Knowledge Document List pane to browse the list of documents and to select documents with which to work.

## Windows

The Keyword Search tab provides access to a number of panes and windows to help you perform rapid knowledge base searches to quickly resolve issues. Typically, a window opens when you select a command from a menu or click a button in another window. For example, when you select Preferences from the View menu, the Preferences window opens.

### Add File window

The Add File window opens when you do either of the following:

- Right-click a folder or repository in the Repositories list from the Administration tab and select Add File from the shortcut menu
- Right-click a folder or repository in the Repositories list on the Attachments tab on the Update Knowledge Document window and select Add File from the shortcut menu

Use the Add File window to specify the location and name of a file to upload to the attachment library. When you click Upload, the product puts the specified file in the folder or repository you selected.

This window contains the following fields:

#### **File**

Defines the location and name of a file to upload to the attachment library. If you click the Browse button, a standard Windows Choose File window opens so you can choose the file to upload.

**Example:** C:\mydirectory\myfile.doc

#### **Name**

Enter an internal name that you can use to track the file.

#### **Description**

Enter an internal description of the file, for example, what the file is for, what it contains, or other descriptive text.

This window contains the following buttons:

#### **Browse**

Opens a standard Windows Choose File window on which you can navigate to and select a file to upload.

#### **Upload**

Uploads the specified file to the attachment library and displays a prompt when the upload finishes. Click OK to close the prompt.

**Close**

Closes the document, window, or dialog.

## Create New Comment window

The Create New Comment window opens when you click Add Comment on the Comments tab on the Create New Document window or the Update Knowledge Document window.

Use the Create New Comment window to enter a brief comment about the document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

**Comment**

Defines a comment that provides information about the document. This field is required.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves the comment and opens the View Comment window.

## Create New/Update/Detail Document Windows

The Create New, Update, and Detail Document windows open when you do any of the following:

- Right-click a category name in the Category pane of the Knowledge Categories pane on the Knowledge or Administration tab and select Create Knowledge Document or Create Knowledge Tree Document from the shortcut menu
- Right-click a document title in the Knowledge Document List pane of the Knowledge Categories pane on the Knowledge or Administration tab and select Create Knowledge Document or Create Knowledge Tree Document from the shortcut menu

- Select a category in the Category pane of the Knowledge Categories pane on the Knowledge or Administration tab, then select Create Knowledge Document or Create Knowledge Tree Document from the File menu
- Select New Knowledge Document or New Knowledge Tree Document from the File menu on the Knowledge tab (when Unicenter KT is installed) or the Keyword Search tab (when Unicenter KT is not installed).
- Click Save on the Create New Document window
- Right-click a document title in the Knowledge Categories pane on the Knowledge or Administration tab and select Open from the shortcut menu
- Click a document title in the Knowledge Categories pane on the Knowledge or Administration tab
- Right-click a document title in the Knowledge Document List pane on the Keyword Search tab and select Edit from the shortcut menu
- Click Edit from the Knowledge Document window
- Right-click a document title in the Knowledge Document List pane and select Edit from the shortcut menu

Use the Create New Document window to define the initial content of a new knowledge document.

**Important!** Make sure you use significant searchable words when filling in the Title, Summary, Problem and Resolution text fields, not just noise words. If you use only noise words, your document will become inaccessible after it is saved and indexed.

Use the Update Knowledge Document window to update the content, attributes, permissions, category and document relationships, attachments, comments, and notifications for a document and to review the document's history.

**Note:** The Update Knowledge Document window appears as the Detail Document window, without specifically stating the term update. Use the notebook pages to update the document.

These windows include the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

These windows contain one or more of the following tabs:

- Content
- Attributes
- Permissions
- Categories

- Attachments
- Comments
- Notifications
- History

These windows contain some or all of the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

**Assign to Category Owner**

This check box lets you indicate whether to assign the new document to a category owner. Click the check box to assign the new document to a category owner, or click again to un-check. This field is enabled on the Create New Document window only.

**Title**

Defines a short, descriptive name for the document. For knowledge tree documents, the value in the Title box also defines the name of the primary node in the knowledge tree.

**Summary**

Defines a summary that briefly describes the problem associated with the document. Use the Problem box to describe the problem in detail.

**Problem**

Defines the full description of the problem associated with the document. NLS search type is based on this field.

### **Resolution**

Defines the description of how to resolve the problem. Click Edit Resolution to open the HTML Editor so you can create or update the resolution. This field only displays when you are creating or updating a knowledge document.

### **Quick View**

Specifies to display content in the associated field as it will appear at runtime. This field only displays when you are creating or updating a knowledge document.

### **HTML Source**

Specifies to display content in the associated field as editable HTML source code. Select this option to make simple changes directly to the HTML code. This field only displays when you are creating or updating a knowledge document.

### **Notes**

Defines additional information about the document. The contents of this field are available only to analysts.

Depending on the approval process task with which the document is currently associated, these windows may contain the following buttons:

#### **Edit**

Opens the Create/Update Document window so you can modify document contents and attributes. The edit window will only open if you are a user with write permission to the document. If you do not have write permission to the document, the read-only view window will open instead.

#### **Forward**

Opens the Forward Document window so you can assign the document to the analyst who will complete the next task in the approval process. When you click OK to forward the document, the Forward Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Forward button displays for all approval process tasks except the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

#### **Publish**

Opens the Knowledge Document Detail window and makes the document available for viewing.

**Note:** System administrators can use the Publish button at any time to bypass the approval process and immediately publish a document. Analysts working on a document can use the Publish button if the document is at the last stage of the approval process and ready to be published.

### **Reject**

Opens the Reject Document window so you can reject the document, reassigning it to the previous assignee. When you click OK to reject the document, the Reject Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Reject button displays for all approval process tasks except the first (which is, by default, Create Document).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

### **Unpublish**

Changes the status of the document from "Published" to draft (or the appropriate custom status), and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

### **User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

### **Cancel**

Discards changes and opens view mode.

### **Design Tree**

Opens the DT Builder so you can create the knowledge tree structure to associate with the document. This button only displays when you are creating or updating a knowledge tree document.

### **Edit Resolution**

Opens the HTML Editor so you can use plain text or HTML elements to design a resolution for the problem that the knowledge document addresses. This button only displays when you are creating or updating a knowledge document.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves changes to the current document.

**Note:** The Save button is only available on the Update/Create Document window if you have write access to the document. A document is read-only when it is published (as per Administrative option) or retired, or when the document's permissions preclude you from changing it.

### **Spell Check All Fields**

Checks the content of the Title, Summary, Problem, Resolution, and Notes fields. If the text of any of the fields contains a spelling error (that is, a word that does not exist in the product dictionary), the Spell Check Results window opens. The window shows the contents of all non-empty fields, separated by headers of the form --TITLE--, --SUMMARY-- and so on, with the first misspelled word highlighted.

## **Date Helper window**

The Date Helper window opens when you click  on a window or dialog on which you must specify a date and time.

Use the Date Helper window to select when an event defined by the window or dialog from which you accessed the Date Help window occurs.

This window contains the following fields:

### **Month**

Specifies the month during which an event occurs.

**Default:** The month during which the Date Helper window opened.

### **Year**

Specifies the year during which an event occurs.

**Limits:** The year must be in the range 1994 to 2013.

**Default:** The year during which the Date Helper window opened.

### **Calendar**

Displays the days of the selected month and year. Click a day to select it.

**Default:** The day during which the Date Helper window opened.

### **24-Hour**

Specifies how to display the values in the Hour list.

- Select the 24-Hour check box to display values in the Hour list using 24-hour time format.

**Example:** 15.

Clear the 24-Hour check box to display values in the Hour list using 12-hour time format.

**Example:** 3 pm.

**Default:** The check box is cleared.

**Hour**

Specifies the hour during which an event occurs.

**Default:** The hour during which the Date Helper window opened.

**Minute**

Specifies the minute during which an event occurs.

**Default:** The minute during which the Date Helper window opened.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Next**

Sets the Month value to the month that follows the current selection and refreshes the Calendar control to display the days of the newly selected month.

**OK**

Closes the Date Helper window and sets the value of the field from which you accessed the window to the selected date and time.

**Prev**

Sets the Month value to the month that precedes the current selection and refreshes the Calendar control to display the days of the newly selected month.

## Event for Document View window

The Event for Document window opens when you right-click an Event on the History tab of the Update Knowledge Document window and select View from the shortcut menu. The fields on this window are read-only.

Use the Event for Document window to view the detail of the selected event.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Event**

Displays the name of the selected event.

### **Event Detail**

Displays the detail information for the selected event.

### **Time Stamp**

Displays the date and time (in *mm/dd/yyyy hh:mm am/pm* format) at which the selected event occurred.

**Example:** 08/23/2004 04:13 am

## Knowledge Document Window

The Knowledge Document window opens when you do either of the following:

- Click a Knowledge Document icon or title on:
  - The Knowledge Document List on the Knowledge tab.
  - The Knowledge Document List of the Knowledge Documents nodes of the Scoreboard on the Knowledge Tools tab.
- Right-click a knowledge document title in the Knowledge Categories pane on the Administration tab, then select Document View from the shortcut menu
- Right-click a knowledge document title in the Knowledge Document List on the Knowledge tab and select View from the shortcut menu.
- Click a Knowledge Document link, for example, under the Top Solutions section.
- Click a Knowledge Document link, for example, under the Top Solutions section of *Customer or Employee* user interface
- Click a Knowledge Document icon or title in Activities tab of a Request or an Issue of KT Log Solution type

- Click a Knowledge Document icon or title after search on the Knowledge tab of a Request or an Issue

Use the Knowledge Document window to view and interact with a knowledge document.

**Note:** To create a new document or update an existing document, see Create New/Update/Detail Document Windows (see page 271).

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Documents contain a variety of information organized to optimize user access. Documents created using the default Built In - Knowledge Document template are divided into two areas:

- The left side of the document (the document body) contains information about the problem the document addresses, the suggested resolution for the problem, and links to related resources. In addition to the document title, specific information displayed may include the following:

**Summary**

Displays a brief description of the problem associated with the document.

**Problem**

Displays the full description of the problem associated with the document.

**Resolution**

Displays the description of how to resolve the problem.

**See Also**

Displays links to other documents in the knowledge base that are related to the current document. Click a link under See Also to open the associated document in a new window.

**Attachments**

Displays links to files attached to the document as supplemental information. When you click a link, the attached file opens in an appropriate application.

**Related Categories**

Displays links to categories that are related to the document. Click a link under Related Categories to list the documents that reside in the linked category and its subcategories in the Knowledge Document List pane.

**Related Tickets**

Lists any tickets related to this document.

### **Properties**

Displays the properties specified in the document template. By default, the numeric Document ID and the date on which the document was created are displayed.

### **Comments**

Displays comments added by document users through the Comment box on the document. Each comment displays with the name and email address of the contact who entered it and the date the comment was entered.

- The right side of the document contains menus, page option links, solution survey fields, and comment fields.

### **Page Options**

Displays commands for interacting with the document. Use the Page Options commands to edit, email, bookmark, print, close, and subscribe to the current document. You can also create a new request or create a new request based on the document being viewed, depending on how you accessed this window.

- The Solution Survey and Comments are two boxes that let you rate and comment upon the document:

#### **Solution Survey**

Defines feedback regarding the effectiveness of the document in answering your question and lets you open an issue or request. The product uses your feedback to calculate the document's FAQ rating.

#### **Comment**

Defines comments to add to the document. For example, you might add a comment that clarifies the document's resolution. Comments you add display under the Comments heading in the document body.

**Note:** Documents created using a customized template may contain different information.

---

## Forward Document window

The Forward Document window opens when you click Forward on the Update Knowledge Document window.

Use the Forward Document window to move a document to the next stage of the approval process and to assign the document to an analyst for that stage. You can also specify an optional comment for the document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Next Task**

Displays the approval process task to which the document will be forwarded. This field is read-only.

### **Next Status**

Displays the approval process status to which the document will be forwarded. The default statuses are:

#### **Draft**

The document has been created, and possibly assigned to an analyst for review and modification, but is not currently available in the knowledge base (that is, it is not published).

#### **Published**

The document is available in the knowledge base and those users or groups with access can view it.

#### **Retired**

The document has been removed from the knowledge base, either manually or as the result of the expiration date passing, and is no longer available.

This field is read-only.

### **Next Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm forwarding the document to the next approval process task. When you click OK, the Forward Document window closes. The forwarded document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

## Knowledge Document Detail window

The Knowledge Document Detail window opens when you do any of the following:

- Click Cancel on the Update Knowledge Document window
- Click Publish on the Update Knowledge Document window, then click OK to confirm publishing
- Click OK on the Forward Document window, then click OK to confirm forwarding
- Click OK on the Reject Document window, then click OK to confirm rejection

Use the Knowledge Document Detail window to review the content and attributes defined for a document, to unpublish a document, or to preview a document as users will see it at runtime.

This window contains the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments
- Notifications
- History

This window contains the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

This window contains the following buttons:

**Edit**

Opens the Update Knowledge Document window so you can modify document contents and attributes. This command only displays for the document owner, for system administrators, and when the document status is "Unpublished."

**Unpublish**

Changes the status of the document from "Published" to "Unpublished", and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

**User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

## Email Document window

The Email Document window opens when you click Email on the Page Options menu when viewing a document.

Use the Email Document window to email a link to the document or a copy of the document to specified recipients.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### Your Name

Defines the name (in "last name, first name" format) of the user to identify as sender of the email.

**Default:** Your name (as specified to the product).

Your Email

Defines the email address of the email sender.

**Default:** The email address associated with your user account.

### Send To

Defines the email addresses of contacts to whom you want to send the document or link. Enter one or more email addresses, or click  to open the Contact Search window so you can search for and select contacts. Use semicolons (;) to separate multiple email addresses.

### Subject

Defines a subject for the email.

**Default:** The document's type (Knowledge Document or Knowledge Tree Document) and ID.

### Personal Message

Defines a text message to accompany the document or link you are sending.

### Send Document

Specifies how the product should attach the document to your email. Select one of the following options:

#### In HTML

The product inserts the document in the body of the email in HTML format. Recipients can view the document directly in the email.

**Link Only**

The product inserts a URL link in the email. Recipients must click the link to display the document in a web browser.

**Default:** In HTML.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Closes the Email Document window and sends the email to the specified recipients.

## Knowledge Document List pane

The Knowledge Document List pane displays documents that match the criteria specified in the Knowledge Search pane, or documents for the selected scoreboard item. Use the Knowledge Document List pane to browse the list of documents and to select documents with which to work.

This pane contains the following columns:

**Title**

By default, displays the title and summary information defined for each document in the result set. When you click the document title, the document opens. When you right-click the document, the Knowledge Document List shortcut menu opens.

**Attributes**

Displays the attributes defined for each document in the result set. By default, the Attributes column includes the Document ID and Modify Date attributes.

If the Knowledge Document List pane contains more documents than can display on a single page, you can use the following browse links at the top of the pane to navigate the list:

<<

Displays the first page of documents.

<

Displays the previous page of documents.

>

Displays the next page of documents.

>>

Displays the last page of documents.

**List All**

Displays all of the documents in a single scrollable list.

An indicator at the top of the Knowledge Document List pane displays your current position and the total number of documents in the list.

## Knowledge Search pane

The Knowledge Search pane contains controls with which you can specify criteria for and initiate a basic or advanced search of the knowledge base. The pane occupies the entire Keyword Search tab until you perform a search, then it displays above the Knowledge Document List pane when you click Show Filter. Click Show Filter to display the search fields; click Hide Filter to close the Knowledge Search pane. When you click Search, the Knowledge Document List pane opens and lists documents that match your search criteria.

Advanced search options allow overriding the Knowledge Search Document Settings on the Preferences window.

This pane contains the following fields:

**Keywords for Advanced Search**

Defines a space-delimited list of words or a phrase by which to filter documents retrieved. When you click Search, the product returns only documents that contain the specified keywords.

**Whole words with % wild cards**

Search text should contain at least two letters before percent sign, for example, 'xy%'; leading percent as in '%xy' is prohibited. Words beginning with search text should contain more than one letter. One digit is allowed.

**Search In**

Specifies which document fields to search for specified keywords. When you click Search, the product returns only documents that contain the specified keywords in the fields specified by the selected *Search In* check boxes. Select any combination of the following check boxes:

- Problem
- Resolution
- Summary
- Title

---

These check boxes only display when Keyword Search is the selected search type. If you select Natural Language Search from the Search Type list, the Search In check boxes do not display and the product only searches the Problem fields of documents.

### Search Type

Specifies the type of search to perform. Select one of the following options:

#### Keyword Search

Select this option to search for the specified keywords in the Title, Summary, Problem, and Resolution fields of documents. Use the Search In check boxes to exclude one or more of these fields.

#### Natural Language Search

Select this option to search for the specified text only in the Problem fields. Natural Language Search (NLS) allows you to perform a search using natural language, which compares the pattern of words contained in the query with the patterns of words contained in the Problem field of knowledge base documents.

**Default:** Keyword Search.

### Match Type

Specifies the method for text matching during the search. Select one of the following options:

#### Any of the Words (OR)

A match occurs when the product finds *any* of the specified words in a document.

#### All of the Words (AND)

A match occurs only when the product finds *all* of the specified words in a document.

**Default:** Any of the Words (OR).

### Match Type

Specifies the method by which the product searches documents. Select one of the following options:

#### Whole words

The search retrieves only documents that contain the entire words entered.

#### Words beginning with...

The search retrieves documents that contain the entire words entered or words that begin with the words entered. For example, a search for the word "print" also returns documents containing the words "printer" or "printing".

The Match list setting overrides the default set on the Preferences window and is only available when you specify keywords or phrases for which to search.

**Default:** Whole words.

### **Order By**

Specifies a criterion by which to sort search results. Select one of the following options:

#### **Relevance**

Sorts documents by their relevance to the specified search criteria (expressed as EXCELLENT, GOOD, and so on). Documents with the highest relevance (EXCELLENT) are listed first.

#### **Hits**

Sorts documents by the number of times users have accessed them, with the most frequently accessed documents listed first.

#### **Solution Count**

Sorts documents by the number of issues or requests they have resolved, as reported by users. Documents with the highest solution counts are listed first.

#### **Modify Date**

Sorts documents by the date on which they were last modified, with the most recently modified documents listed first.

### **Owner**

Defines the name of the owner by which to filter documents retrieved. Do one of the following:

- Enter the name of the owner in "last name, first name" format.
- Click  to open the Contact Search window so you can locate and select an owner.
- Enter some or all of the owner name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Owner box.

When you click search, the product returns only documents associated with the specified owner.

### Author

Defines the author name by which to filter documents retrieved. Do one of the following:

- Enter the name of the author in "last name, first name" format.
- Click  to open the Contact Search dialog so you can locate and select an author.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Author box.

When you click Search, the product returns only documents associated with the specified author.

### Subject Expert

Defines the expert by which to filter documents retrieved. Do one of the following:

- Enter the name of the expert in "last name, first name" format.
- Click  to open the Contact Search dialog so you can search for and select an expert.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the Subject Expert box.

When you click Search, the product returns only documents associated with the specified subject expert.

### Priority

Specifies the priority level (1, 2, 3, 4, 5, or None) by which to filter documents retrieved. When you select no priority (that is, you leave <empty> as the field value), the product does not consider priority when filtering documents. When you click Search, the product returns only documents with the specified priority.

**Default:** <empty>.

### Severity

Specifies a severity level (1, 2, 3, 4, or 5) by which to filter documents retrieved. When you select no severity (that is, you leave <empty> as the field value), the product does not consider severity when filtering documents. When you click Search, the product returns only documents associated with the specified severity level.

**Default:** <empty>.

### **Product**

Defines a product by which to filter documents retrieved. Enter the name of the product in the box, or click  to open the Product Search window so you can search for and select one. When you click Search, the product returns only documents associated with the specified product.

### **Asset**

Defines the name of an asset (hardware, software, or service) by which to filter documents retrieved. Enter the name of the asset in the box, or click  to open the Asset Search window so you can search for and select one. When you click Search, the product returns only documents associated with the specified asset.

### **Root Cause**

Defines a root cause (that is, the core reason for opening the ticket) by which to filter documents retrieved. Possible root causes might include Hardware Failure, Software Failure, and Network Cable. Enter the root cause in the box, or click  to open the Root Cause Selection window so you can search for and select one. When you click Search, the product returns only documents associated with the specified root cause.

### **Impact**

Specifies the level of impact (1, 2, 3, 4, 5, or none) by which to filter documents retrieved. When you select no impact (that is, you leave <empty> as the field value), the product does not consider impact when filtering documents. When you click Search, the product returns only documents associated with the specified impact.

**Default:** <empty>.

### **Urgency**

Specifies an urgency level (1, 2, 3, 4, or 5) by which to filter documents retrieved. When you select no urgency level (that is, you leave <empty> as the field value), the product does not consider urgency when filtering documents. When you click Search, the product returns only documents associated with the specified urgency level.

**Default:** <empty>.

### **Title**

Defines a document title by which to filter documents retrieved. When you click Search, the product returns only documents with the specified title.

### **Summary**

Defines a document summary by which to filter documents retrieved. When you click Search, the product returns only documents with the specified summary.

### **Additional Search Arguments**

Defines additional criteria by which to search. This field only displays when you click a More link in the Knowledge Search pane.

This pane contains the following buttons:

#### **Clear Filter**

Returns all filter fields on the pane or window to their default values.

#### **Search**

Initiates a search for items that match the specified criteria. When you specify no criteria, the product returns all appropriate items (for example, folders/documents, contacts, templates, noise words, or permission groups).

#### **Show/Hide Filter**

Displays or hides fields with which you can filter a search for items on the current window, pane, or dialog.

## **Knowledge Tree Document window**

The Knowledge Tree Document window opens when you do any of the following:

- Right-click a knowledge tree document title in the Knowledge Categories pane, then select Document View from the shortcut menu
- Click a knowledge tree document title in the Knowledge Document List on the Knowledge tab
- Right-click a knowledge tree document title in the Knowledge Document List on the Knowledge tab, then select View from the shortcut menu.

Use the Knowledge Tree Document window to view and interact with a knowledge tree document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Documents contain a variety of information organized to optimize user access. Documents created using the default Built In - Knowledge Tree Document template are divided into three areas:

- The left pane contains a dynamic map of the document. The bottom entry in the map indicates the current location in the document. Use the map in the left pane as necessary to navigate to previously viewed branches of the knowledge tree document.

- The right pane contains the knowledge tree document, a menu, and two boxes that let you rate and comment upon it the document. This pane contains the following components:

#### **Document View**

Displays the document as a knowledge tree. In this mode, the window contains information about the problem the document addresses, the suggested resolution for the problem, and links to related resources. To view the document as a knowledge tree, click the Display button under the Resolution heading.

#### **Tree Navigation**

Provides navigation to nodes in the knowledge tree that you have already viewed. The following links may be available:

**Tree Description**-Displays a description of the purpose of the knowledge tree document, if one was defined.

**Start Over**-Returns to the first page of the document.

**Prev**-Returns to the previous page of the document.

**Next**-Returns to the next page of the document.

**Last**-Returns to the last viewed page of the document.

#### **Page Options menu**

Displays commands for interacting with the document. Use the Page Options commands to edit, email, bookmark, print, close, and subscribe to the current document. You can also create a new request or create a new request based on the document being viewed, depending on how you accessed this window.

#### **Solution Survey**

Defines feedback regarding the effectiveness of the document in answering your question and lets you open an issue or request. The product uses your feedback to calculate the document's FAQ rating.

#### **Comment**

Defines comments to add to the document. For example, you might add a comment that clarifies the document's resolution. Comments you add display under the Comments heading in the document body.

**Note:** Documents created using a customized template may contain different information.

---

## Preferences Window

The Preferences Settings window opens when you do either of the following:

- Select Preferences from the View menu
- Click Edit on the Preferences Detail window

Use the Preferences window to set default Knowledge Tools behaviors.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### Avoid Popups

Specifies whether to reduce the number of new browser windows opened by displaying new forms in the main browser window whenever possible.

- Select the check box to minimize the number of new browser windows opened.
- Clear the check box to open new browser windows according to the properties set in the form definition.

**Default:** Cleared.

**Note:** If this option is selected, the Back to List button will be activated, and can be used to navigate from detail forms back to the previously displayed list window. The Back to List button will appear in the upper right-hand side of the window.

### Display Score Count

Specifies whether you want to display the score count left-justified.

**Default:** Cleared.

### Keep Log Reader Window

Specifies whether to keep the Log Reader window open when you select the Close All Popups command from the Window menu and after you log off of Knowledge Tools. This setting has no effect when the Log Reader window is not open.

- Select the check box to keep the Log Reader window open.
- Clear the check box to close the Log Reader window when you select the Close All Popups command or log off of Knowledge Tools.

**Default:** Selected.

### Preserve Popup Size

Specifies whether to open new popup windows with the same dimensions as the most recently resized popup window.

- Select the check box to use the new dimensions for new popup windows.
- Clear the check box to open new popup windows with default dimensions.

**Default:** Selected.

**Note:** If you set Preserve Popup Size to on (checked), and you maximize a popup window, subsequent popup windows may cover any other Service Desk window you may have open. However, new popup windows will appear slightly off the screen, to the right and lower. This is because there is a 10 pixel (left and top) offset for popups - so that they do not completely overlay the currently displayed window. It is recommended that you do not maximize popup windows when using the Preserve Popup Size option.

#### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

#### **Using Screen Reader**

Selecting this preference modifies Service Desk behavior for optimal use with a screen reader for blind and limited vision users. You must log off and log back on again after changing this preference. From the Service Desk Help menu, select the item "Screen Reader Usage", for an overview of using Service Desk with a screen reader.

#### **Search Type**

Specifies the default type of search to perform. Select one of the following options:

##### **Keyword Search**

Select this option to search for the specified keywords in the Title, Summary, Problem, and Resolution fields of documents.

##### **Natural Language Search**

Select this option to search for the specified keywords in the Problem fields of documents.

The Search Type field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Keyword Search.

### Match Type

Specifies the default method for text matching during a search. Select one of the following options:

#### Any of the Words (OR)

A match occurs if the product finds *any* of the words specified in the Keywords for Advanced Search box in a document.

#### All of the Words (AND)

A match occurs only if the product finds *all* of the words specified in the Keywords for Advanced Search box in a document.

#### Exact Phrase

A match occurs only if the product finds the exact phrase specified in the Keywords for Advanced Search box in a document.

The Match Type field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Any of the Words (OR).

### Match

Specifies the default method by which the product searches documents. Select one of the following options:

#### Whole words

The search retrieves only documents that contain the entire words entered.

#### Words beginning with...

The search retrieves documents that contain the entire words entered or words that begin with the words entered. For example, a search for the word "print" also returns documents containing the words "printer" or "printing".

The Match field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Whole words.

### Order By

Specifies the default property by which to sort documents retrieved. The Order By field displayed when you click Show Filter in the Knowledge Document List pane overrides this setting.

**Default:** Relevance.

### **Search In**

Specifies which document fields to search for specified keywords. When you click Search, the product returns only documents that contain the specified keywords in the fields specified by the selected *Search In* check boxes. Select any combination of the following check boxes:

- Problem
- Resolution
- Summary
- Title

These check boxes only display when Keyword Search is the selected search type. If you select Natural Language Search from the Search Type list, the Search In check boxes do not display and the product only searches the Problem fields of documents.

**Default:** All check boxes are selected.

### **Documents Per Page (Knowledge Document List Settings)**

Specifies the number of documents (25 or 50) to display on each page of the Knowledge Document List pane.

**Default:** 25.

### **Show Document List Details**

Specifies whether detailed information displays in the Knowledge Document List pane on the Knowledge tab.

Select the check box to display the following default information:

- Title
- Summary
- Document ID
- Modify Date

Clear the check box to display only the document title.

**Default:** The check box is selected.

### **Documents Per Page (Knowledge Categories Document List Settings)**

Specifies the number of documents (25 or 50) to display on each page of the Knowledge Document List pane.

**Default:** 25.

### **Attributes to be shown in list**

Displays two lists with which you can define the properties that display for each document in the Knowledge Document List pane on the Knowledge Categories pane of the Administration tab.

- To display a property in the Knowledge Document List pane, select it from the Available List and use the > (Select Item) button to move it to the Selected list.
- To move all of the properties from the Available list to the Selected list, click >> (Select All Available Items).
- To remove a property from the Knowledge Document List pane, select it from the Selected list and use the < (Remove Item from Selected List) button to move it to the Available list.
- To move all of the the properties from the Selected list to the Available list, click << (Remove All Items from Selected List).

To select multiple items in either the Available or Selected list, hold down the Ctrl key while you click each item you want to select or hold down the Shift key while you click the first and last items in a series.

**Default:** DOC ID, Owner, Assignee, Modify Date, and Document Status display in the Selected list.

**Note:** Choosing attributes different than the Preference default may impact performance. If you believe that extra display columns are needed, contact the system administration and ask them to use the Web Screen Painter utility to modify the default page columns for the Document List form.

### Active Zone

From the drop down list, select the active zone for your Global Knowledge Tools environment, for example, your organization's Intranet.

This window contains the following buttons:

#### Cancel

Discards changes and opens view mode.

#### Reset

Returns all fields on the window or dialog to their default values.

#### Save

Saves and applies the specified settings, closes the current window, and opens the Preferences Detail window (see page 298).

## Preferences Detail window

The Preferences Detail window opens when you click Save or Cancel on the Preferences window.

Use the Preferences Detail window to review default Knowledge Tools behaviors. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Avoid Popups**

When selected, will reduce the number of new browser windows opened by displaying new forms in the main browser window whenever possible.

**Note:** If this option is selected, the Back to List button will be activated, and can be used to navigate from detail forms back to the previously displayed list window. The Back to List button will appear in the upper right-hand side of the window.

### **Display Score Count**

Displays the score count as left-justified..

### **Keep Log Reader Window**

Displays whether the product will keep the Log Reader window open when you select the Close All Popups command from the Window menu and after you log off of Unicenter SD. This setting has no effect when the Log Reader window is not open.

### **Preserve Popup Size**

Displays whether the product will open new popup windows with the same dimensions as the most recently resized popup window.

**Note:** If you set Preserve Popup Size to on (checked), and you maximize a popup window, subsequent popup windows may cover any other Service Desk window you may have open. However, new popup windows will appear slightly off the screen, to the right and lower. This is because there is a 10 pixel (left and top) offset for popups - so that they do not completely overlay the currently displayed window. It is recommended that you do not maximize popup windows when using the Preserve Popup Size option.

### **Mouseover Menus**

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

---

### Using Screen Reader

Selecting this preference modifies Service Desk behavior for optimal use with a screen reader for blind and limited vision users. You must log off and log back on again after changing this preference. From the Service Desk Help menu, select the item "Screen Reader Usage", for an overview of using Service Desk with a screen reader.

### Search Type

"Using" indicates the type of search to perform. Select either Keyword Search or Natural Language Search.

### Match Type

Displays the default method for text matching during a search. Possible values are Any of the Words (OR), All of the Words (AND), and Exact Phrase.

### Match

Displays the default method by which the product searches documents, either Whole Words or Words Beginning With.

### Order By

Displays the default property by which the product will sort documents retrieved.

### Mouseover Menus

When this box is checked, a menu will display when the mouse pointer is over its link. A mouse click is not required. This setting requires that you to reload any active forms for it to take effect.

### Search In

Displays which document fields the product will search for specified keywords. These check boxes only display when Keyword Search is the selected search type.

### Documents Per Page (Knowledge Document List Settings)

Displays the number of documents (10, 25, or 50) that the product will display on each page of the Knowledge Document List pane.

### Show Document List Details

Displays whether the Knowledge Document List pane on the Knowledge tab includes detailed information. If the check box is selected, the following default information displays:

- Title
- Summary
- Document ID
- Modify Date

If the check box is cleared, on the document title displays.

### **Documents Per Page (Knowledge Categories Document List Settings)**

Displays the number of documents (10, 25, or 50) that the product will display on each page of the Knowledge Document List pane.

### **Attributes to be shown in list**

Displays the properties listed for each document in the Knowledge Document List pane of the Knowledge Categories pane on the Administration tab.

**Note:** Choosing attributes different than the Preference default may impact performance. If you believe that extra display columns are needed, contact the system administration and ask them to use the Web Screen Painter utility to modify the default page columns for the Document List form.

### **Active Zone**

From the drop down list, select the active zone for your Global Knowledge Tools environment, for example, your organization's Intranet.

This window contains the following buttons:

#### **Edit**

Opens the Preferences window so you can modify preferences.

## **Preview Window (User View)**

The Preview window opens when you do either of the following:

- Click User View on the Update Knowledge Document window
- Click User View on the Knowledge Document Detail window
- Right-click a Document in the Document List in the Knowledge Categories window under the Administration tab, and select User View

Use the Preview window to view the current document as it will display to users at runtime. This enables you to verify your design before you publish the document. The fields on this window are read-only.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

Use the Print command in the Page Options menu on the upper right side of the Preview window to opens a standard Windows Print dialog so you can specify options for printing the contents of the current document.

---

## Reject Document window

The Reject Document window opens when you click Reject on the Update Knowledge Document window.

Use the Reject Document window to move a document to a previous approval process task and assign an analyst to the document for that task. When multiple previous tasks exist, system administrators can choose the approval process task to which the document will revert. Assignees without administrator privileges can reject the document back to the previous task in the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

### **Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

### **Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

### **Previous Tasks**

Lists approval process tasks to which the document can revert. This field only displays if the current assignee has administrator privileges and there are multiple previous tasks in the approval process.

For each task, the Previous Tasks list displays the assignee who completed the task and the date on which the document was forwarded. When you click a task name to select the task to which to reject the document, the Reject Document window refreshes so you can specify an assignee and enter a comment.

### **Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

### **Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

#### **Cancel**

Discards changes and opens view mode.

#### **OK**

Prompts you to confirm rejecting the document to a previous approval process task. When you click OK, the Reject Document window closes and the rejected document appears in the specified assignee's Inbox in the Knowledge Document folder on the Service Desk tab.

The Spell Check Results window opens when you check spelling or click the Spelling button. The spell checker scans the header or body information and displays each unrecognized word in the Spell Check Results window. Use the window to specify what action to take on such words. When you correct or otherwise act upon a word, the product moves to the next unrecognized word, and so on until it has scanned the entire header or body.

You can use the Spell Check Results window to do the following:

- Correct the spelling of a specific occurrence of the unrecognized word in the template header or body
- Correct the spelling of all occurrences of the unrecognized word in the template header or body
- Select a word to replace the unrecognized word
- Ignore a specific occurrence of the unrecognized word in the template header or body

- Ignore all occurrences of the unrecognized word in the template header or body

This window contains the following fields:

#### **Not in Dictionary**

Displays the word that the product has identified as misspelled (that is, not in the product dictionary).

**Limits:** This field is read-only.

#### **Change To**

Displays the word in the product dictionary that is the closest in spelling to the unrecognized word or the current selection from the Suggestions list.

You can accept the spelling of the replacement as presented or type an alternate spelling in the Change To box, then do one of the following:

- Click Change. The product changes the current occurrence of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.
- Click Change All. The product changes all occurrences of the word displayed in the Not in Dictionary field to the word displayed in the Change To box.

#### **Suggestions**

Specifies words that are close in spelling to the unrecognized word. When you select a word from the list, it displays in the Change To box.

#### **Context**

Displays the unrecognized word in the context in which it is used in the template.

Editing the text in the Context box has no effect on the template's contents.

This window contains the following buttons:

#### **Change**

Changes the current occurrence of the word in the Not in Dictionary field to the word in the Change To box.

#### **Change All**

Changes all instances of the word in the Not in Dictionary field to the word in the Change To box.

#### **Close**

Closes the document, window, or dialog.

### **Ignore**

Disregards the current instance of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

### **Ignore All**

Disregards all instances of the unrecognized word and advances to the next unrecognized word. If there are no additional unrecognized words, the Spell Check Results window closes and the product displays an informational message. Click OK to close the message.

## **Unpublish Document window**

The Unpublish Document window opens when you do either of the following:

- Click Unpublish on the Update Knowledge Document window
- Click Unpublish on the Knowledge Document Detail window

Use the Unpublish Document window to remove the document from the knowledge base so it is no longer available to users. If you have administrator privileges, you can use the Unpublish Document window to retire the document (that is, remove it from the knowledge base and the approval process) or select the approval process task to which the document will revert. If you do not have administrator privileges, the document reverts to the previous task in the approval process.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

### **Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

---

This field is read-only.

**Previous Tasks**

Lists approval process tasks to which the document can revert. This field only displays if the current assignee has administrator privileges and there are multiple previous tasks in the approval process.

For each task, the Previous Tasks list displays the default assignee for the task. When you click a task name to select the task to which to unpublish the document, the Unpublish Document window refreshes so you can specify an assignee and enter a comment.

**Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm unpublishing the document to a previous approval process task. When you click OK, the Unpublish Document window closes and the unpublished document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

**Retire this Document**

Prompts you to confirm retiring the selected document. When you click OK, the Unpublish Document window closes and the product removes the document from the knowledge base and the approval process.

## Unretire Document window

The Unretire Document window opens when you click Unretire on the Update Knowledge Document window.

Use the Unretire Document window to return a retired document to the knowledge base and workflow. If you are a system administrator, you can republish the document or (when multiple tasks exist) choose the approval process task to which the document will return. Assignees without administrator privileges can return the document to the previous task in the approval process.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### **Title**

Displays the title of the document. This field is read-only.

### **Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

### **Previous Task**

Displays the approval process task to which the document will revert. The Previous Task field displays under the following circumstances:

- When the window first displays and the current assignee does not have administrator privileges or there is only one previous task. If the current assignee has administrator privileges and there are multiple previous tasks, the Previous Tasks list displays instead.
- When you select the task to which to assign the document and the window refreshes so you can specify an assignee and enter a comment.

This field is read-only.

### **Assignee**

Specifies a contact to have responsibility for the document for the duration of the next approval process task. This field displays after you select a task to which to assign the document. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

**Default:** The contact assigned the task in the approval process template associated with the document.

**Comment**

Defines a comment that provides information about the document. This field displays after you select a task to which to assign the document.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**OK**

Prompts you to confirm unretiring the document to the selected approval process task. When you click OK, the Unretire Document window closes and the document appears in the specified assignee's Inbox in the Knowledge Documents folder on the Service Desk tab.

**Publish this Document**

Unretires and publishes the document. When you click Publish this Document, the product prompts you to confirm the action. Click OK to close the message and the Unretire Document window, and republish the document.

## Update Comment window

The Update Comment window opens when you do any of the following:

- Click Edit on the View Comment window
- Click a comment on the Comments tab of the Update Knowledge Document window
- Right-click a comment on the Comments tab of the Update Knowledge Document window, then select Edit from the shortcut menu

Use the Update Comment window to edit a comment associated with the current document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

**Comment**

Defines a comment that provides information about the document. This field is required.

This window contains the following buttons:

**Cancel**

Discards changes and opens view mode.

**Reset**

Returns all fields on the window or dialog to their default values.

**Save**

Saves the comment and opens the View Comment window.

The Update Knowledge Document window opens when you do any of the following:

- Click Save on the Create New Document window
- Right-click a document title in the Knowledge Categories pane on the Administration tab and select Open from the shortcut menu
- Click a document title in the Knowledge Categories pane on the Administration tab
- Right-click a document title in the Knowledge Document List pane on the Keyword Search tab and select Edit from the shortcut menu

Use the Update Knowledge Document window to update the content, attributes, permissions, category and document relationships, attachments, comments, and notifications for a document and to review the document's history.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following tabs:

- Content
- Attributes
- Permissions
- Categories
- Attachments
- Comments
- Notifications
- History

---

This window contains the following fields:

**ID**

Displays the ID number that the product assigned the document at creation. This field is read-only and for new documents, contains no value until you save the document.

**Indexing Status**

Possible statuses include Pending and Indexed. This field is read-only and for new documents, contains no value until you save the document.

**Current Task**

Displays the approval process task with which the document is currently associated. This field is read-only.

**Current Status**

Displays the approval process status with which the document is currently associated. This field is read-only.

Depending on the approval process task with which the document is currently associated, this window may contain the following buttons:

**Cancel**

Discards changes, closes the current window, and opens the Knowledge Document Detail window.

**Forward**

Opens the Forward Document window so you can assign the document to the analyst who will complete the next task in the approval process. When you click OK to forward the document, the Forward Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Forward button displays for all approval process tasks except the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

**Publish**

Opens the Knowledge Document Detail window and makes the document available for viewing.

**Note:** System administrators can use the Publish button at any time to bypass the approval process and immediately publish a document. Analysts working on a document can use the Publish button if the document is at the last stage of the approval process and ready to be published.

### **Reject**

Opens the Reject Document window so you can reject the document, reassigning it to the previous owner and task. When you click OK to reject the document, the Reject Document and Update Knowledge Document windows close and the Knowledge Document Detail window opens. The Reject button displays for all approval process tasks except the first (which is, by default, Create Document) and the last (which is, by default, Publish).

**Note:** This button only displays when the approval process contains multiple tasks and the final task has not been performed. The system administrator can add as many tasks as appropriate to the approval process.

### **Reset**

Returns all fields on the window or dialog to their default values.

### **Save**

Saves changes to the current document and (as appropriate) notifies analysts of the changes.

**Note:** The Save button is only available on the Update/Create Document window if you have write access to the document. A document is read-only when it is published (as per Administrative option) or retired, or when the document's permissions preclude you from changing it.

### **Unpublish**

Changes the status of the document from "Published" to "Unpublished", and removes the document from the knowledge base availability. This button only displays when a document's status is "Published".

If you are a system administrator, the Unpublish button opens the Unpublish Document window so you can retire the unpublished document or associate it with a new owner and the approval process task specified on the Administration tab. If you are a non-administrative user, the product associates the document with the approval process task specified on the Administration tab when you unpublish it.

### **User View**

Opens the Preview window, which presents the document as it will appear when a user displays it.

---

## Update Notification window

The Update Notification window opens when you do either of the following:

- Right-click an alternate email address or a user name on the Notifications tab of the Update Knowledge Document window and select Edit from the shortcut menu
- Click Edit on the View Notification window

Use the Update Notification window to edit the user name or alternate email address associated with a document notification.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following fields:

### User Name

Defines the name of the contact to notify of activity associated with the current document. Do one of the following:

- Enter the name of the contact in "last name, first name" format.
- Click  to open the Contact Search window so you can locate and select a contact.
- Enter some or all of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one contact matches the characters you entered, the product inserts the contact name in the User Name box.

### Alternate Email

Defines an alternate email address to which to send notifications in addition to the address associated with the specified contact.

This window contains the following buttons:

### Cancel

Discards changes, closes the current window or dialog, and opens the View Notification window.

### Reset

Returns all fields on the window or dialog to their default values.

### Save

Saves the notification and opens the View Notification window.

## View Comment window

The Comment for Document Detail window opens when you do any of the following:

- Click Save on the Create New Comment window
- Click Save on the Update Comment window
- Click Cancel on the Update Comment window
- Right-click a comment on the Comments tab of the Update Knowledge Document window and select View from the shortcut menu

Use the View Comment window to review a comment you added or edited for a document.

This window includes the Unicenter Service Desk banner, which may contain a menu bar, search fields, and other controls to help you work with information in Unicenter Service Desk.

This window contains the following field:

### **Comment**

Displays a comment that provides information about the document you are editing, forwarding, rejecting, publishing, unpublishing, or unretiring. This field is read-only.

This window contains the following buttons:

### **Close**

Closes the document, window, or dialog.

### **Edit**

Opens the Update Comment window so you can modify the comment.

## View Notification window

The View Notification window opens when you do any of the following:

- Click Save on the Create New Notification window
- Click Save on the Update Notification window
- Click Cancel on the Update Notification window

Use the View Notification window to review a new or updated notification.

This window contains the following fields:

### **User Name**

Displays the name of the contact or group to notify.

### **Alternate Email**

Displays the alternate email address defined for the contact, if one exists.

This window contains the following buttons:

### **Close**

Closes the document, window, or dialog.

### **Edit**

Opens the Update Notification window so you can edit the selected notification.

## Windows window

The Windows window opens when you select List All Windows from the Window menu on the Knowledge tab.

Use the Windows window to view a list of windows that Knowledge Tools currently has open and to navigate directly to a specific open window.

To move focus (that is, navigate) to a specific window, click its name on the Windows window.

This window contains the following buttons:

### **Close Window**

Closes the current window.

### **Refresh**

Updates the list of open windows.

## Menus

The menu bar on the Keyword Search tab contains the following menus:

- File (see page 314)
- View (see page 315)
- Window (see page 316)
- Help (see page 316)

**Note:** Some windows and dialogs contain menu bars with window-specific commands. For information about window- or dialog-specific menu bars, see the appropriate topics in this help system.

The Keyword Search tab also includes shortcut menus that open when you right-click an item in the Knowledge Document List pane. For example, if you right-click a document in the Knowledge Document List pane, the Knowledge Document List shortcut menu opens.

## File menu

The commands on the File menu let you print the current window or create a knowledge document or knowledge tree document.

This menu contains one or more of the following commands:

### **New Knowledge Document**

Opens the Create New Document window so you can define the content and attributes of a new knowledge document in the selected category.

### **New Knowledge Tree Document**

Opens the Create New Document window so you can define the content and attributes of a new knowledge tree document in the selected category.

### **Print Form**

Opens a standard Windows Print dialog so you can specify options for printing the contents of the current document, pane, window, or dialog.

In addition, the File menu on the Knowledge Categories window has the additional commands to help you manage documents and document categories.

## View menu

The commands on the View menu let you view response time statistics for Knowledge Tools, set preferences, and refresh the Knowledge Document List pane.

This menu contains one or more of the following commands:

### **Knowledge Categories**

Opens the Knowledge Categories pane which is used to manage content for each problem-solving model in the knowledge base. From the Knowledge Categories pane, users with system administrator or knowledge manager rights can:

- Create, publish, and maintain knowledge documents and knowledge tree documents
- Manage the knowledge category structure to make document access easier

### **Knowledge Report Card**

The Knowledge Report Card provides feedback to analysts, knowledge engineers, knowledge managers, and system administrators about which knowledge documents are most effective. See Knowledge Report Card for more information.

### **Response Time Statistics**

Activates response time statistics reporting. Until you deactivate the function, a prompt reports Knowledge Tools response times when you perform an action. This command only displays when the function is not active.

### **Preferences**

Opens the Preferences window so you can specify default preferences for various product components.

### **Refresh**

Updates the current window to include the latest changes.

## Window menu

The commands on the Window menu let you manage which windows and dialogs display on your screen. This menu contains one or more of the following commands:

### **Close All Popups**

Closes all currently open Knowledge Tools windows except the main window.

### **List All Windows**

Opens the Windows window, which lists all currently open Knowledge Tools windows. Click a window name to move focus to the selected window.

### **View Main Page**

Moves focus to the main Knowledge Tools window. This command only displays on windows other than the main Knowledge Tools window.

## Help menu

This menu contains one or more of the following commands:

### **Knowledge Tools Help**

Opens a window that provides online help information about the main interface window. The Contents, Index, and Search tabs appear on the left, allowing you to navigate the help system.

### **Help on This Window**

Opens a window that provides online help information about the currently active Knowledge Tools pane or window.

### **Power User Tips**

Opens a window that provides help information such as keyboard shortcuts for expert Knowledge Tools users.

### **Screen Reader Usage**

This Help menu item opens a window explaining how to use a Screen Reader with Knowledge Tools.

### **Support for Knowledge Tools**

Opens the CA support web site for Knowledge Tools.

### **Operations Info**

Typically, this Help menu command displays a window showing information about your product installation, such as hours of operation and contact information.

The information displayed on this window is contained in the file:

`$NX_ROOT/bopcfg/www/html/web/analyst/about.html`.

If you want to customize this file for your installation, please copy it to:  
`$NX_ROOT/site/mods/www/html/web/analyst/about.html`

- and then make the required changes.

### **About Knowledge Tools**

Opens the About window, which provides information about this version of the product, third party notices, technical support information, and system information. Click Done to close the About window.

## Procedures

The following topics provide procedures for using the Keyword Search tab to work with knowledge documents and knowledge tree documents in the knowledge base.

### **Add a Category Link to a Document**

To add a category link to a document, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Right-click the category to link to the document, then select Link this Category from the shortcut menu.

The product adds the selected category path to the Category Links list and to the current document. At runtime, the link displays in the document under the "Related Categories" heading.

## Add a Comment to a Document You are Editing

To add a comment to a document you are editing, follow these steps:

1. Open the document for editing.
2. Click the Comments tab.
3. Click Add Comment.

The Create New Comment window opens.

4. Enter a brief comment in the Comment box.
5. Click Save.

The Create New Comment window closes and the View Comment window opens so you can review your comment.

6. Do one of the following:

- Click Close Window.

The View Comment window closes. Select Refresh from the View menu to refresh the Comments tab.

- Click Edit.

The View Comment window closes and the Update Comment window opens so you can change the comment.

## Add a Comment to a Document You are Viewing

To add a comment to a document you are viewing, follow these steps:

1. View the document.
2. Locate the Comment box on the document window.
3. Enter your user name (that is, the ID with which you log into the product) in the Name box.
4. Enter your email address in the Email box.
5. Enter your feedback in the Comment box.
6. Click Submit.

The product displays an informational message and the Comment box becomes read-only. When you next access the document, your user ID, email address, and comment display under the Comments heading.

## Add a Contact to the Notification List

You can specify contacts to notify by email of events such as changes in a document's content or status. To add a contact to a document's notification list, follow these steps:

1. Open the document for editing.
2. Click the Notifications tab.
3. Click Add Notification.

The Create New Notification window opens.

4. Do one of the following to define the contact to notify in the User Name box:
  - Enter the name of the contact in "last name, first name" format.
  - Click  to open the Contact Search window so you can locate and select a contact.
  - Enter one or more characters of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one entry matches the characters you typed, the product automatically enters that name in the field.
5. (Optional) Enter an alternate email address to which to send notifications in addition to the address associated with the specified contact in the Alternate Email box.
6. Click Save.

The Create New Notification window closes and the View Notification window opens so you can review your settings.

7. Do one of the following:

- Click Close Window.

The View Notification window closes. Select Refresh from the View menu to refresh the Notifications tab.

- Click Edit.

The View Notification window closes and the Update Notification window opens so you can change the user name or alternate email address.

## Add a Document Link to a Document

To add a document link to a document, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Select the category that contains the document for which you want to add a link from the Categories list.

The Documents list refreshes to display the ID numbers and titles of documents in the selected category.

4. Right-click the ID number of the document to link, then select Link this Document from the shortcut menu.

The product adds the selected document to the Document Links list and to the current document. At runtime, the link displays in the document under the "See Also" heading.

## Add a URL Link to a Document

To add a URL link to a document, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Type the fully-qualified URL (for example, **http://www.ca.com**) in the field provided, then click Add URL Link.

The Attachments list refreshes to include the URL. At runtime, the link displays in the document under the "Attachments" heading. When a user clicks the link, the associated resource opens for viewing in a separate browser window.

---

## Attach a File to a Document

To add a file attachment to a document, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Navigate to the folder that contains the file you want to attach in the Repositories list.

The Files list refreshes to display the ID numbers and names of files in the selected folder.

(Optional) Right-click the ID number of a file, then select View from the shortcut menu to open the selected file in an appropriate program so you can preview it before attaching it to the document.

4. Right-click the ID number of the file to attach, then select Attach this File from the shortcut menu.

The Attachments list refreshes to list the path and name of the file attachment. At runtime, file attachments are typically listed under the "Attachments" heading in the document. When a user clicks the link to a file attachment, the attachment opens for viewing in an appropriate program.

## Check Spelling in a Document

To check spelling in a document, follow these steps:

1. Open the document for editing.
2. Click the Spell Check button.

**Note:** The Spelling button is only available for the Resolution section when the HTML Source option is selected.

The product scans the document and opens the Spell Check Results window.

- If the product encounters no unrecognized words, it closes the Spell Check Results window. The spelling check is complete.
  - If the product encounters unrecognized words, it displays the first unrecognized word in the Not in Dictionary field on the Spell Check Results window. Continue with Step 3.
3. Do one of the following:
    - Enter a replacement for the unrecognized word in the Change To box.
    - Select one of the suggested replacements for the unrecognized word from the Suggestions list.
    - Continue with Step 4 without specifying an alternative to the unrecognized word.

4. Do one of the following:
  - Click Change to replace the current occurrence of the unrecognized word with the word you entered in the Change To box or selected from the Suggestions list.
  - Click Change All to replace all occurrences of the unrecognized word with the word you entered in the Change To box or selected from the Suggestions list.
  - Click Ignore to leave the current occurrence of the unrecognized word unchanged.
  - Click Ignore All to leave all occurrences of the unrecognized word unchanged.

The Spell Check Results window displays the next unrecognized word. If there are no more unrecognized words in the document, the Spell Check Results window closes.

## Complete the Solution Survey for a Document

You can use the Solution Survey box in a document to open an issue or request and to provide information that the product uses to calculate the document's FAQ rating.

To complete the solution survey for the currently open document, follow these steps:

1. (Optional) Select an option in the Solution Survey box to open an issue or request.
2. Select one of the following options in the Solution Survey box to rate the effectiveness of the current document in addressing your problem:

### **Very helpful**

Indicates that the document solved the problem or provided all of the information necessary to solve the problem.

### **Somewhat helpful**

Indicates that the document provided most of the information necessary to solve the problem.

### **Not helpful at all**

Indicates that the document provided very little or none of the information necessary to solve the problem.

3. Click Submit.

The document refreshes and the Solution Survey box becomes read-only. If you selected an option other than No in Step 1, the Create New Request window opens.

**Note:** If the document helped you solve your problem or answer your question and you do not want to complete the solution survey, click the Yes (Close) button. The product closes the document and adds it to the solution count used to calculate FAQ ratings.

## Create a Knowledge Document

To create a knowledge document, follow these steps:

1. Select New Knowledge Document from the File menu on the Keyword Search tab.

The Create New Document window opens.

Complete the fields in the Content tab as appropriate.

2. Click Edit Resolution.

The HTML Editor opens.

3. Use the HTML Editor to design the body (that is, the resolution) of the document, then click OK to save the resolution and close the HTML Editor.

4. (Optional) Click Spell Check to check spelling in the content you entered.

5. Click Save.

The Create New Document window closes and the Update Knowledge Document window opens.

6. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.

7. Complete the fields on the remaining tabs on the Update Knowledge Document window as appropriate.

8. Click Save when you finish editing the document.

9. Do one of the following:

- Click Forward to advance the document to the next approval process task.
- Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
- Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

## Create a Knowledge Tree Document

To create a knowledge tree document, follow these steps:

1. Select New Knowledge Tree Document from the File menu on the Keyword Search tab.

The Create New Document window opens.

Complete the fields in the Content tab as appropriate.

2. (Optional) Click Spell Check to check spelling in the content you entered.
3. Click Save.
4. The Create New Document window closes and the Update Knowledge Document window opens.
5. Click Design Tree.

The DT Builder opens.

6. Create the knowledge tree, then click Save and Close to save the tree design and close the DT Builder.
7. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.
8. Complete the fields on the remaining tabs on the Update Knowledge Document window as appropriate.
9. Click Save when you finish editing the document.
10. Do one of the following:
  - Click Forward to advance the document to the next approval process task.
  - Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
  - Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

## Delete a Comment from a Document

To delete a comment from a document, follow these steps:

1. Open the document for editing.
2. Click the Comments tab.
3. Right-click the comment, then select Delete from the shortcut menu.

An informational message displays.

4. Click OK.

The informational message closes and the product deletes the contact from the Comment list.

## Delete a Contact from the Notification List

To delete a contact from a document's notification list, follow these steps:

1. Open the document for editing.
2. Click the Notifications tab.
3. Right-click the user name or alternate email of the contact to delete, then select Delete from the shortcut menu.

An informational message displays.

4. Click OK.

The informational message closes and the product deletes the contact from the notification list.

## Delete a File Attachment from a Document

To remove an attachment from a document, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Right-click the file to remove from the document in the Attachments list, then select Remove from the shortcut menu.

A confirmation message displays.

4. Click OK.

The confirmation message closes and the product removes the selected attachment from the Attachments list and the document.

## Edit a Comment in a Document

To edit a comment associated with a document, follow these steps:

1. Open the document for editing.
2. Click the Comments tab.
3. Right-click the comment to edit, then select Edit from the shortcut menu.  
The Update Comment window opens.

4. Edit the comment as appropriate, then click Save.

The Update Comment window closes and the View Comment window opens so you can review your changes.

5. Do one of the following:

- Click Close Window.

The View Comment window closes and the Comments tab refreshes.

- Click Edit.

The View Comment window closes and the Update Comment window opens so you can change the comment definition.

## Edit a Contact in the Notification List

To edit a contact in a document's notification list, follow these steps:

1. Open the document for editing.
2. Click the Notifications tab.
3. Right-click the alternate email address or the user name of the contact to edit in the Document Notification List, then select Edit from the shortcut menu.

The Update Notification window opens.

(Optional) Do one of the following to define the contact to notify in the User Name box:

- Enter the name of the contact in "last name, first name" format.
- Click  to open the Contact Search window so you can locate and select a contact.
- Enter one or more characters of the contact name and click  to open the Contact List window so you can select from entries that match the characters you entered. For example, if you enter "Pa", the Contact List window lists all contacts whose last name begins with "Pa". If only one entry matches the characters you typed, the product automatically enters that name in the field.

4. (Optional) Enter an alternate email address to which to send notifications in addition to the address associated with the specified contact in the Alternate Email box.

5. Click Save.

The Update Notification window closes and the View Notification window opens so you can review your settings.

6. Do one of the following:

- Click Close Window.

The View Notification window closes and the Notifications tab refreshes.

- Click Edit.

The View Notification window closes and the Update Notification window opens so you can change the user name or alternate email address.

## Edit a Document from the Keyword Search Tab

To edit a document, follow these steps:

1. (Optional) Use the Knowledge Search pane to specify criteria with which to search for the document to edit.

2. Click Search.

The Knowledge Search pane closes and the Knowledge Document List pane displays documents that match your search criteria. If you specified no search criteria, the Knowledge Document List pane lists all documents in the knowledge base.

3. Right-click the title of the document to edit, then select Edit from the shortcut menu.

The Update Knowledge Document window opens.

**Note:** If the document has been published, you may need to unpublish it before making changes.

4. (Optional) Complete or change the fields on the various tabs as appropriate.

5. (Optional) Do one of the following, as appropriate:

- For a knowledge document, click Edit Resolution on the Content tab to open the HTML Editor so you can modify the body (that is, the resolution) of the document. Click OK to save your changes and close the HTML Editor.
- For a knowledge tree document, click Design Tree on the Content tab to open the DT Builder so you can edit the knowledge tree. Click Save and Close to save the tree design and close the DT Builder.

6. (Optional) Click Spell Check to check spelling in the content you entered.
7. (Optional) Click User View to open the Preview window, which presents the document as it will appear when a user displays it. Click  to close the Preview window when you finish reviewing the document.
8. Click Save when you finish editing the document.  
The product saves your changes.
9. Do one of the following:
  - Click Forward to advance the document to the next approval process task.
  - Click Publish to put the document in the knowledge base and make it available to users with the appropriate permissions.
  - Click Cancel to close the Update Knowledge Document window and open the Knowledge Document Detail window.

## Filter the Knowledge Document List

To specify criteria by which to determine which documents display in the Knowledge Document List pane, follow these steps:

1. If the Knowledge Search pane is not displayed, click Show Filter.  
The Knowledge Search pane opens.
2. Complete fields in the Knowledge Search pane as appropriate.  
The more criteria you specify, the fewer results will return when you apply the filter.
3. Click Search.  
The Knowledge Search pane closes and the Knowledge Document List pane displays your filtered results.

---

## Forward a Document

When you complete an approval process task for a document that is not yet at the last stage of the approval process, you can forward it to the next task.

To forward a document to the next approval process task, follow these steps:

1. Open the document for editing.
2. Click Forward on the Update Knowledge Document window.

**Note:** The Forward button is only available if the document is not at the final stage of the approval process.

The Forward Document window opens.

3. (Optional) Specify a contact to have responsibility for the document for the duration of the next approval process task. Do one of the following:
4. Select the name of the contact to assign the document to, or click  to open the Contact Search window so you can locate and select one.

If you do not select an alternate assignee, the product associates the document with the assignee defined in the approval process template.

5. (Optional) Enter a brief comment for the document in the Comment box.
6. Click OK.

A confirmation message displays.

7. Click OK.

The confirmation message and the Forward Document window close, and the product forwards the document to the next approval process task and assignee.

## Open a Document from the Keyword Search Tab

To open a document from the Keyword Search tab, follow these steps:

1. (Optional) Use the Knowledge Search pane to specify criteria with which to search for the document to edit.
2. Click Search.

The Knowledge Search pane closes and the Knowledge Document List pane displays documents that match your search criteria. If you specified no search criteria, the Knowledge Document List pane lists all documents in the knowledge base.

3. Do one of the following:
  - To open the document for editing, right-click its title in the Knowledge Document List pane and select Edit from the shortcut menu.

The selected document opens in the Update Knowledge Document window.

- To open the document as it will display to users at runtime, click its title in the Knowledge Document List pane.

The selected document opens in the Knowledge Document window or the Knowledge Tree Document window, as appropriate.

## Open an Item from the Unicenter Service Desk Banner

To open a specific item from the Unicenter Service Desk banner, follow these steps:

1. Select the type of item for which to search from the Search Type list on the right side of the banner.

You can select one of the following items:

Request

- Change
- Issue
- Knowledge (when Unicenter KT is installed)
- Document by ID (when Unicenter KT is installed)
- User by ID
- User by Phone
- User by Name

2. Enter the information by which to search for the selected item in the Search Criterion box to the left of the Go button.

For example:

- If you selected Request, Change, or Issue, enter the product-defined identification number for the selected ticket type.
- If you select Knowledge, enter the keyword to search for in the document knowledge base.
- If you selected Document by ID, enter the product-defined document identification number. This feature is only available when Unicenter Knowledge Tools is installed.
- If you selected User by ID, enter the name with which the user logs on to Knowledge Tools.
- If you selected User by Phone, enter the user's primary telephone number.
- If you selected User by Name, enter the user's name in "last name, first name" format.

3. Click Go.

The product searches for and displays the item that matches your specified criterion. For example:

- If you selected Request, Change, or Issue, the product displays the Detail window for the matching ticket.
- If you selected Knowledge, the product will retrieve all documents containing the keyword(s) that you entered in a document list.
- If you selected Document by ID, the product displays the Knowledge Document window or the Knowledge Tree Document window for the matching document.
- If you selected User by ID, User by Phone, or User by Name, the product displays the Contact Information window for the matching contact.

## Preview a Document

To preview a document as it will display to users at runtime so you can verify content and design before you publish the document, follow these steps:

1. Do one of the following, as appropriate:
  - On the Knowledge tab or the Keyword Search tab, click on the title of the document to view it in the User View.
  - On the Administration tab, click the title of the document.

The document opens Update Knowledge Document window.

2. Click *User View*.

The document opens in the Preview window.

3. (Optional) Select Print from the Page Options menu on the right side of the document to open a standard Windows Print dialog so you can print the document.

4. Click .

The Preview window closes.

## Print a Document

To print a document, follow these steps:

1. Do one of the following, as appropriate:
  - On the Knowledge tab or the Keyword Search tab, click the title of the document in the Knowledge Document List pane.
  - On the Administration tab, right-click the title of the document in the Knowledge Categories pane, then select *User View* from the shortcut menu.

The document opens.

2. Click Print on the Page Options menu.  
A standard Windows Print dialog opens.
3. Specify the appropriate print settings, then click Print.

The Print dialog closes and the document prints.

## Publish a Document

When you are ready to add a document to the knowledge base, you can “publish” it from the Update Knowledge Document window. Analysts and knowledge engineers can publish documents when they are at the last stage of the approval process. Knowledge managers and system administrators can publish documents at any stage of the approval process.

To publish a document, follow these steps:

1. Open the document for editing.
2. Click Publish.

A confirmation message displays.

3. Click OK.

The confirmation message and the Update Knowledge Document window close, and the Knowledge Document Detail window opens. The product adds the document to the knowledge base.

## Remove a Category Link from a Document

To remove a category link, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Right-click the category link to remove in the Category Links list, then select Remove this Category from the shortcut menu.

**Note:** You cannot remove the link to the primary category.

The product removes the selected category link from the Category Links list and the document.

## Remove a Document Link from a Document

To remove a document link, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.
3. Right-click the document link to remove in the Document Links list, then select Remove this Link from the shortcut menu.

The product removes the selected document link from the Document Links list and the document.

## Remove a URL Link from a Document

To remove a document link, follow these steps:

1. Open the document for editing.
2. Click the Attachments tab.
3. Right-click the URL link to remove in the Attachments list, then select Remove from the shortcut menu.

An informational message displays.

4. Click OK.

The informational message closes and the product removes the selected document link from the Attachments list and the document.

## Retire a Document

When a published document reaches its expiration date, the product typically retires it (that is, removes the document from the knowledge base and the approval process).

To retire a document before its expiration date, follow these steps:

1. Open the document for editing.
2. Click Unpublish.

The Unpublish Document window opens.

3. Click Retire This Document.

A confirmation message displays.

4. Click OK.

The confirmation message and the Unpublish Document window close, and the product removes the document from the knowledge base and the workflow.

## Send a Document in Email

To email the current document to one or more recipients, follow these steps:

1. View the document.
2. Click Email on the Page Options menu.

The Email Document window opens.

3. Complete the fields on the Email Document window as appropriate.

4. Click OK.

The Email Document window closes and the product sends your email to the specified recipients.

---

## Set the Primary Category for a Document

To specify a document's primary category, follow these steps:

1. Open the document for editing.
2. Click the Categories tab.

The Primary Category field at the top of the tab displays the current primary category path. For example, TOP>Email.

3. (Optional) If the Category Links list does not display the category you want to set as primary, right-click the category in the Categories list and select Link this Category from the shortcut menu.

The product adds the selected category path to the Category Links list and to the current document.

4. Right-click the name of the category to set as the document's primary category in the Category Links list, then select Set as Primary Category from the shortcut menu.

A confirmation message displays.

5. Click OK.

The confirmation message closes, and the Primary Category field refreshes to display the updated information.

## Unpublish a Document

After a document has been published, a system administrator or a user with full permissions can unpublish it, thereby removing it from the knowledge base and returning it to the approval process.

To unpublish a document, follow these steps:

1. Open the document for editing.
2. Click Unpublish.

The Unpublish Document window opens.

3. Do one of the following, as appropriate:
  - If you are a system administrator, you can retire the document, thereby removing it from the knowledge base and the approval process. To do so, click Retire this Document. A confirmation message displays.

- If you are a system administrator and there are multiple approval process tasks to which the document might revert, you can select the task to which to assign the document, select an assignee, and (optionally) enter a comment:
    - Click the name of a previous task to which to assign the unpublished document. The Unpublish Document window refreshes.
    - Select the name of a contact to assign the document to from the Assignee list, or click  to open the Contact Search dialog so you can locate and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
  - If you are a knowledge engineer or analyst, you can choose an assignee for the task and (optionally) enter a comment:
    - Select the name of a contact to assign the document to from the Assignee list, or click  to open the Contact Search dialog so you can locate and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
4. Click OK.

The confirmation message and the Unpublish Document window close, and the product retires the document or assigns it to the specified task and owner, as appropriate.

## Unretire a Document

When a published document reaches its expiration date, the product typically retires it (that is, removes the document from the knowledge base and the approval process). A system administrator or a user with full permissions can unretire or republish the document to return it to the approval process and the knowledge base.

To unretire a document, follow these steps:

1. Open the document for editing.
2. Click Unretire.

The Unretire Document window opens.

3. Do one of the following, as appropriate:

- If you are a system administrator, you can republish the document. To do so, click Publish this Document. A confirmation message displays.

- 
- If you are a system administrator and there are multiple approval process tasks to which the document might revert, you can choose the task to which to assign the document, choose an assignee, and (optionally) enter a comment:
    - Click the name of a previous task to which to assign the unretired document. The Unretire Document window refreshes.
    - Select the name of a contact to assign as the owner for the document from the Assignee list, or click  to open the Assignee List dialog so you can search for and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
  - If you are a knowledge engineer or analyst, you can choose an assignee for the task and (optionally) enter a comment:
    - Select the name of a contact to assign as the owner for the document from the Assignee list, or click  to open the Assignee List dialog so you can search for and select one.
    - (Optional) Enter a brief comment in the Comment box.
    - Click OK. A confirmation message displays.
4. Click OK.

The confirmation message and the Unretire Document window close, and the product assigns the document to the specified task and owner and returns the document to the knowledge base and the workflow.

## View a Document from the Knowledge Tab or the Keyword Search Tab

To view a document as it displays to users at runtime, click its title in the Knowledge Document List. The selected document opens in the Knowledge Document window or the Knowledge Tree Document window, as appropriate.

## View Document History

To view the history of a document, follow these steps:

1. Open the document for editing.
2. Click the History tab.

The History tab displays all actions performed on the current document, with the most recent actions listed first. The information on the History tab is read-only.

3. (Optional) Click Show Filter to display controls with which you can specify criteria for filtering the list of events displayed on the History tab. When you specify filtering criteria and click Search, the Event List refreshes to display only events that match your criteria.

# Index

---

## C

### Categories

- creating • 28
- linking documents to • 28
- setting primary category • 28

## D

### Document Editor

- Attributes tab • 27
- Content tab • 25
- creating and saving • 25
- forwarding documents • 25
- History tab • 28
- publishing documents • 25

### Documents

- defining attributes • 27
- defining content • 25
- forwarding • 25
- ID number • 25
- knowledge tree, creating • 25
- modifying • 31
- previewing user view • 52
- publishing • 25
- saving • 25
- status of • 25
- tasks • 25

## F

### FAQ

- Overview • 12

Forwarding documents • 25

## H

History of documents, viewing • 28

## K

Keyword searches • 25

### Knowledge documents

- creating • 25

### Knowledge tree documents

- creating • 30

### Knowledge trees

- creating a document • 30
- creating a tree • 30

## N

Natural Language Search (NLS) searches • 25

## P

### Permissions

- specifying for categories • 21

Previewing documents • 52

### Printing

- document user view • 52

Problem/resolution, defining • 25

Publishing documents • 25

## S

### Searches

- filtering • 25

- Keyword Search vs. NLS • 25

Status of documents • 25

## T

### Tasks

- document • 25

## W

### Windows

- Add Category • 20

- User View • 52