
KnowledgeMax User Guide

Maximizing Intelligent Responses

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1. KnowledgeMax Information

KnowledgeMax is a knowledge base solution designed to make managing responses to common questions more productive and efficient.

KnowledgeMax allows an enterprise to setup a group and assign associated topics to that group including the functionality to link topics across multiple groups.

KnowledgeMax is a standalone solution or it can interface with TeamMax OutBound or CallAssist call center solutions to incorporate the existing campaigns that have been set up to enable the displaying of common queries or objections encountered by the call center agents.

2. KnowledgeMax Install Procedures

To install the **KnowledgeMax** solution download the file:

KnowledgeMax Setup (KnowledgeMaxsetup.exe)

Follow the screen prompts to install **KnowledgeMax** to the local computer.

The default User Name to enter the setup in **KnowledgeMax** is "admin" , Password "admin", this User Name and/or Password can be changed at a later stage through the KnowledgeMax Setup menu.

There is one main database in **KnowledgeMax**:

§ KnowledgeMax.mdb - This database is where the scripts, topics, and linked topics are stored.

When interfaced with TeamMax OutBound or CallAssist call center solutions, KnowledgeMax will also access the Dialer.mdb to source the script information. Topics and Links will be stored in the KnowledgeMax.mdb.

The database is located in the default location of C:\Program Files\Acarda\KnowledgeMax.

The databases should be backed up regularly.

3. KnowledgeMax Install Instructions

To install KnowledgeMax files run KnowledgeMaxsetup.exe , this will extract the required setup files to the default folder location of C:\KnowledgeMax, (this path can be changed if required by typing a different path).

Follow the on screen prompts and use the default settings. Changing the default setting should only be done by an advanced user.

The setup program runs in two steps, the first part unpacks all the setup files then the InstallShield Wizard will start with the installation of the main application.

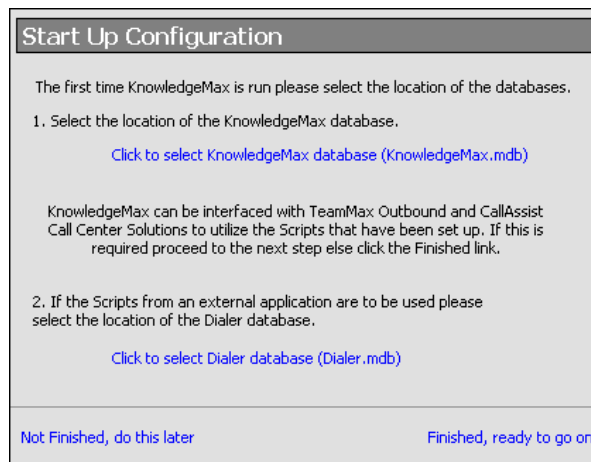
4. KnowledgeMax Start Up Configuration

After completing the installation of the application there are a minimal steps to complete to set the database location for KnowledgeMax.



Start KnowledgeMax by double clicking the desktop icon KnowledgeMax or using the Start menu and navigating to the KnowledgeMax submenu.

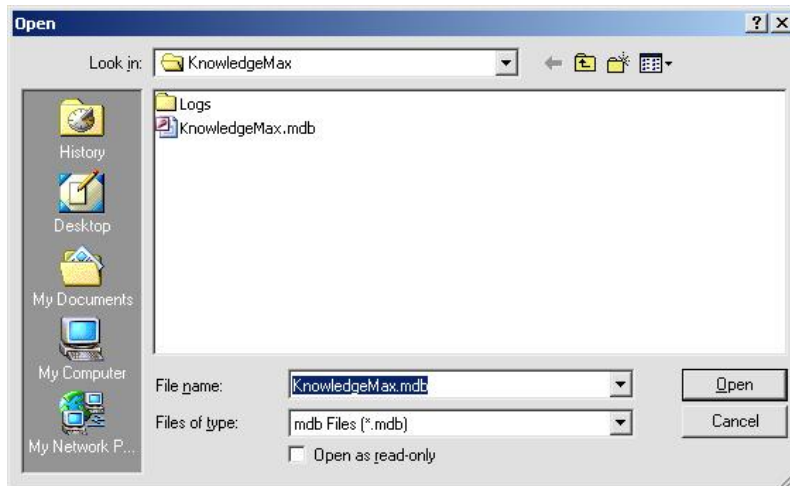
On starting the KnowledgeMax for the first time the "Start Up Configuration" dialog window will be displayed.



The dialog window contains links to set the default location of the databases.

To set the KnowledgeMax database location click;
[“Click, to select the KnowledgeMax Database \(KnowledgeMax.mdb\)”](#)

The default Windows Open dialog will open.



By default the database will be “C:\Program Files\Acarda\KnowledgeMax\KnowledgeMax.mdb”, the default install directory, if required browse to a new location and select the database file and click “Open” to redirect KnowledgeMax to the new location.

If the scripts are to be used from either TeamMax Outbound or CallAssist then proceed with selecting the Dialer.mdb. If this option is not used then the default KnowledgeMax.mdb database will be used for scripts.

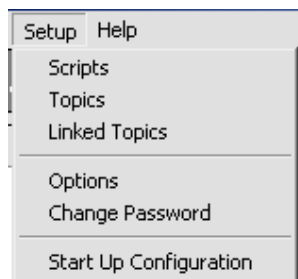
To set the Dialer database location click;
[“Click to select Dialer database \(Dialer.mdb\)”](#)

The default Windows Open dialog will open, browse to the location of the Dialer.mdb and select it and click “Open”.

Once all databases have been set click [“Finished, ready to go on”](#). The KnowledgeMax application window will open.

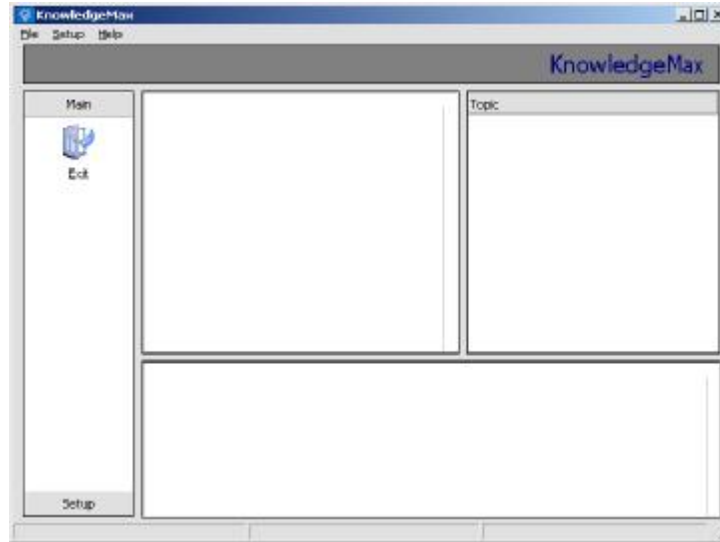
Clicking the [“Not finished, do this later”](#) will exit the configuration dialog and the KnowledgeMax application will not open and the configuration dialog will reappear the next time the KnowledgeMax application is attempted to be started until configuration is completed.

The databases can be redirected after KnowledgeMax has been configured by selecting the “Setup” menu and selecting the Start Up Configuration.

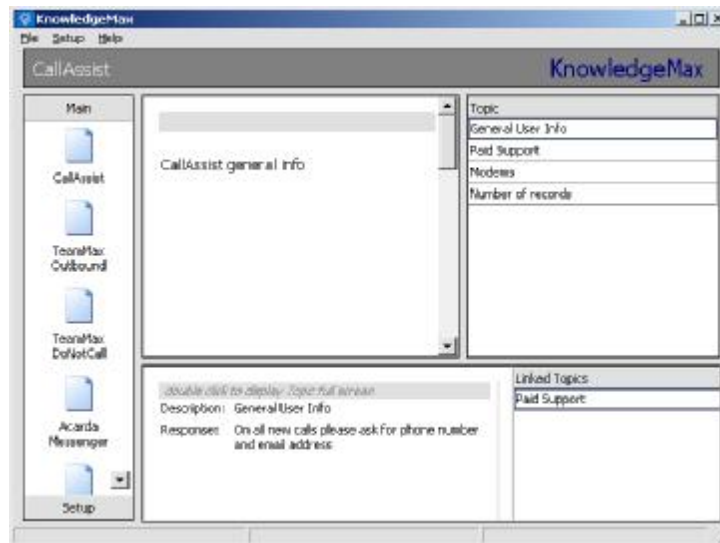


5. KnowledgeMax Main Screen

Once the configuration has been set the main screen of KnowledgeMax displays. If using KnowledgeMax for the first time the window will be displayed as below.



After Scripts are set up the links to each script will be displayed down the left menu sidebar and any Topics will be displayed in the upper right window pane.

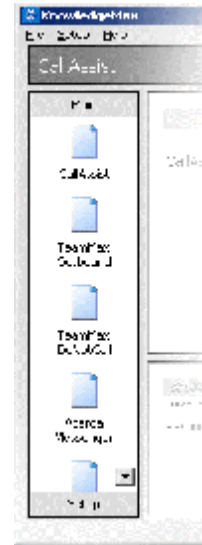


Main Screen Areas

The sidebar on the left of the main window displays all the Scripts or Groups that have been set up. Clicking on one of the icons will change the script and topics that are displayed.

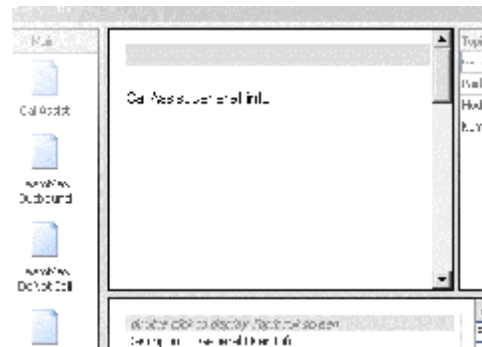
Clicking the Setup bar at the bottom of the sidebar will change the sidebar to display all the Setup Options.

To return to the Script links click on the Main bar at the top of the sidebar menu.



The window pane at the top center of the main window displays the Script details that have been entered.

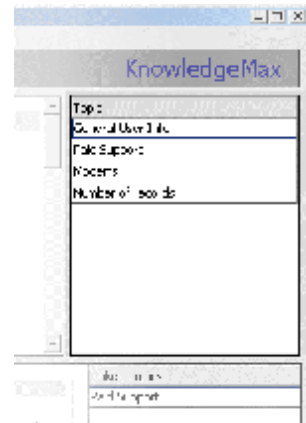
This pane is resizable with the Topics pane by clicking and dragging the bar between the two panes.



The upper right pane of the main window displays all Topics that have been setup against the Script or any global Topics that have been setup to be available across all Scripts.

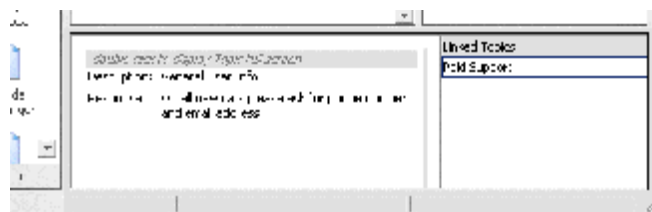
Clicking on any of the Topics listed in the list will display the full details of the Topic in the lower pane.

The lower pane will display the description and response for the selected Topic.



If there are Topics that have been linked to the displayed Topic then on the right of the pane the linked Topics are displayed.

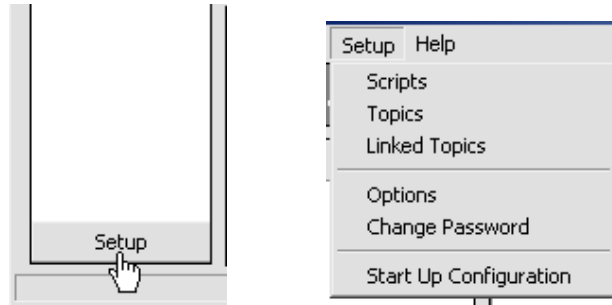
Clicking on one of the Linked Topics listed will change the lower pane to display that Topic.



Double clicking in this pane will maximise the pane to the full main application window to enable a long description or response to be fully visible. A **Close** link at the top of the pane will return the panes to their normal state and be all visible again.

6. Setting Up KnowledgeMax

To get started in setting up KnowledgeMax click on the Sidebar link Setup or click on the Setup menu to display available options.



The Setup menu can be password protected, the default password is "admin".

Clicking the Setup sidebar menu will display the setup options.



6.1. Setting Up Scripts



Script

The first step is to setup Scripts. Scripts can also be described as Groups, each Script can have Topics assigned to it or display global topics.

Clicking on the Script sidebar link or Script Setup menu option will open the Setup Script window to allow entry of scripts or groups. Enter a new script by typing into the row beside *, enter a Name for the script or group and then enter the Script details.

Name	Script
*	

If the option has been chosen to use the Scripts from either TeamMax Outbound or CallAssist a warning message will be displayed when opening the Setup Script window.

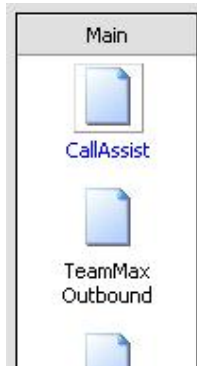


The Scripts in this instance cannot be deleted as this will affect the other application. The text can be edited but please be aware that any changes made in KnowledgeMax will be reflected in the other application as well. Once a script is entered it will be displayed as below.

Name	Script
*	
▶ Hotel Resort ABC	Hi, I'm ringing from Hotel Resort ABC. We would like Hi, I'm ringing from Hotel Resort ABC. We would like to give you one free night accommodation at our luxurious resort. You can hold Control then Enter key To get a new line. Would you be interested in sampling our ... etc
Home Sell JKL	Hi, I'm ringing from Home Sell because we Hi, I'm ringing from Home Sell because we currently need houses in your area

Links along the top of the dialog window allows for the deletion of Scripts, viewing in a card view or printing them.

Once Scripts have been setup the Name will appear in the list of links under the Main sidebar.



Clicking on the link will display the Script and the associated Topics.

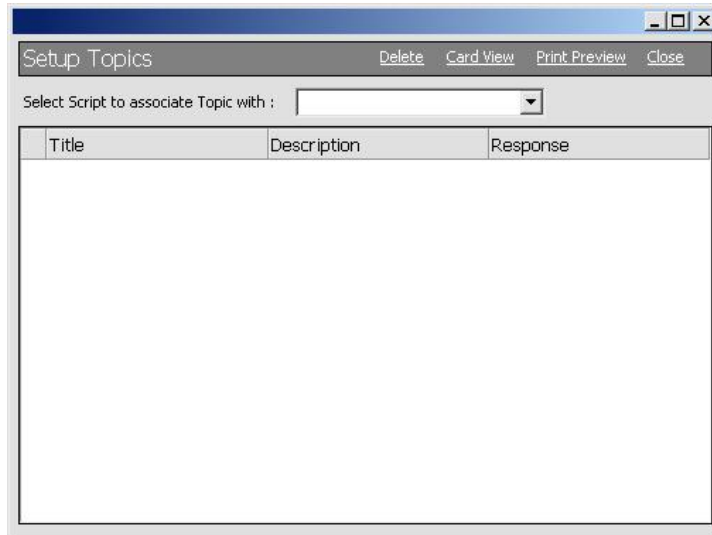
6.2. Setting Up Topics



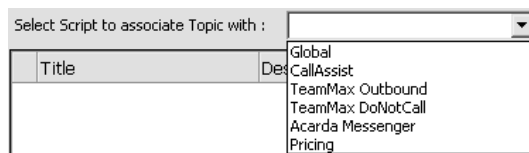
After setting up the scripts the next step to do is to add Topics. Topics can be added without the need of a Script being setup or having an association to a specific Script.

Topics that are set up not associated with a Script are referred to as Global Topics.

Clicking the Topics link on the sidebar menu will display the Setup Topics window as below.



To add a new Topic select the Script from the drop down.



By default Global is always displayed, any Topic added against this will be displayed against all Scripts.

When a specific Script is selected the Topic entered will only be displayed against that Script, it will not be displayed against any other Script, with the exception where it has been linked to a Topic already associated with another Script (refer to [6.3 Setting Up Linked Topics](#)).

Enter a new Topic by typing into the row beside *, enter a Title for the Topic and then enter a Description and Response. The Topics will be displayed as below.

Title	Description	Response
*		
▶ Modems	What modems work wit...	I can email you an exa... I can email you an example of a modem that our clients have found works well with CallAssist.
Number of records	How many telephone nu...	There is no design limit ... There is no design limit but you wouldn't usually have more than 30 or 40,000 numbers.

6.3. Setting Up Linked Topics

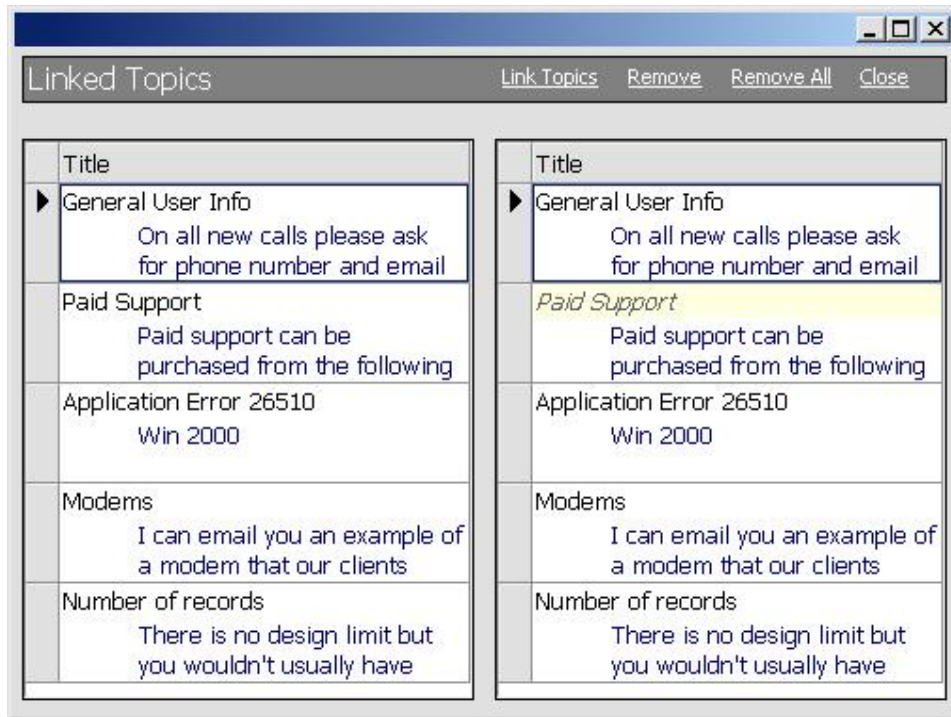


Topics that have been added can be linked with another Topic so that when displayed on screen the linked Topic can also be highlighted.

Linked Topics

Linked Topics can be for the same Script or they can be Topics from different Scripts or Global Topics.

Clicking the Linked Topics link on the sidebar menu will display the Setup Linked Topics window as below.



All Topics are listed in the left and right panes of the window. To link Topics click on a Topic in the left pane and then select a Topic in the right pane, click the [Link Topics](#) link at the top.

When a Topic is selected in the left pane any linked Topics will be displayed in the right pane with the title in italics and a yellow background colour.

To remove a linked Topic select the Topic in the left pane then select the linked Topic in the right pane and click the [Remove](#) link to unlink the two Topics.

Clicking [Remove All](#) will remove all linked Topics of the Topic that is selected in the left pane.

6.4. Changing Password



Change Password

There is an Option to password protect the setup menu, by default the password is set to "admin", clicking on the Change Password link will prompt the user to enter a new password and confirm it.

6.5. Setting Options



Options

The only option currently to set in KnowledgeMax is to enable or disable the password protection of the Setup menu.

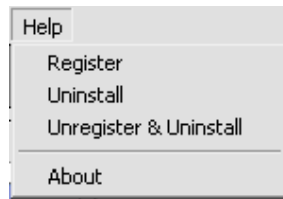
Clicking on the Options link will open the Options dialog to allow the setting of password protection.



7. Enter Registration Keys

Upon purchasing the KnowledgeMax software a Serial Number and Registration Key will be forwarded to the user. These keys have a time lock attached to them and require to be used within 7 days of their receipt.

To enter the keys go to the "Help" menu and select "Register".



The Registration Entry dialog window will open, to ensure that the keys are entered correctly it is advisable to copy and paste the keys.



Once the keys have been entered click  to complete registration.