



transversal
connecting people to knowledge

White paper



Integration overview

Using Transversal with
third-party products



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1. Introduction

“This document provides a high-level overview of the options available for embedding Prescience™ within an existing solution.”

Although often delivered as a fully-hosted micro-site, Transversal’s knowledge platform, Prescience™, is also available for use in an embedded form within existing web and non-web solutions. This is accomplished through use of the Prescience™ API. The API allows direct, programmatic access to the functionality of the Prescience™ platform, including all the standard features of a visitor site knowledgebase. This document provides a high-level overview of the options available for embedding Prescience™ within an existing solution.

There are two main areas for consideration when planning to use Prescience™ as a knowledgebase within the context of an existing system. Firstly, how the knowledgebase will be exposed to site visitors and secondly, how user management will be applied. Each of these is discussed in turn below.

2. Knowledgebase access

2.1. Approach

In order to maximize the benefit of new knowledge tools, it is essential to provide access to their content as easily as possible for prospective users. A knowledgebase that is not well integrated and highly visible to its target audience will struggle to deliver the expected business benefit as users will not diverge from their prior usage patterns to either seek out or engage with the new knowledge repository.

As such, it is strongly recommended that the knowledgebase be placed in a highly visible location on a system that is frequently used. On a public website or intranet this might be in the header bar or as a sidebar tool that appears on every page, for a contact centre desktop this might be embedded in to the CRM, email or order fulfilment system.

Transversal provides a number of different mechanisms to support this. Most frequently, clients choose to host their whole knowledgebase application directly on the Prescience™ platform as a software-as-a-service solution. This model provides extremely quick setup and implementation times, with almost no IT involvement.

However, in other cases the best option is to provide a deeper integration, in order to embed the power of the Transversal knowledgebase directly within an existing product or platform. In this scenario, the most common requests are that the knowledgebase be delivered directly within either:

1. An existing CRM solution within the contact centre, such as SAP Interaction Centre or Microsoft Dynamics.
2. An existing portal platform, such as Microsoft SharePoint, Oracle Portal or Liferay. Portals offer a number of specific benefits within the enterprise, including tools for

configuration, personalization, access control and the ability to rapidly deploy pre-built standards-compliant components from third-party vendors.

Transversal is able to offer access to all core knowledgebase functionality through a JSON API. This enables features such as our natural language search tool, the Memory Engine™, to be used directly within third-party products.

In all cases, the solution continues to use the Prescience™ software-as-a-service platform to provide all content management, workflow, auditing and reporting functionality. This facilitates both easy separation of administration and end user activities on the knowledgebase and also allows the knowledgebase content to be seamlessly reused through other access points, such as a public website, third-party contact centre or remote office locations.

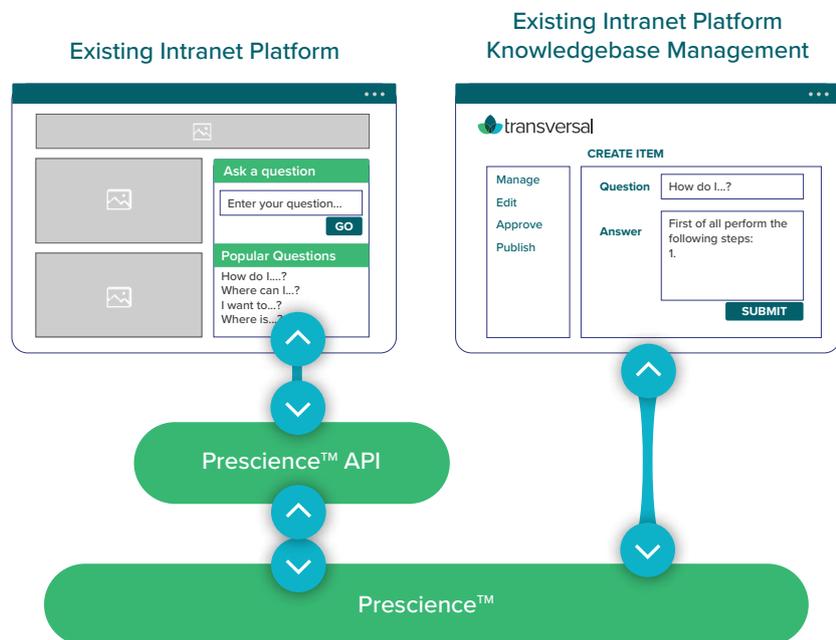


Figure 1: An existing intranet accessing the Prescience™ platform through the Transversal Open API.

2.2. Features

The following standard features are supported through the JSON API:

- natural language search
- search ahead – search as you type
- ‘top 10s’ – both global and by category
- content browsing by category
- related articles – suggested knowledgebase articles based on ‘train of thought’
- rating and feedback on knowledgebase articles
- knowledgebase suggestions – suggest ideas for new content
- newsflashes – push messages from the knowledgebase manager
- Promotion Engine™ – banner and text ads based on the context of the user journey
- contact us – escalate to agents via email or web form (public-facing sites only)
- analytics enablement – track system usage to provide reporting and insight.

2.3. Integrations

Transversal has many active clients and technology partners using its API. A few examples are included below to provide ideas of how the Prescience™ platform can be leveraged.



Figure 2: Some of the channels with which Prescience™ has been integrated.

2.3.1. Websites

Clients such as Volkswagen use the Prescience™ API to embed knowledgebase capabilities within their website. Using the API allows the site design to be owned by their design agency while still making use of our best-in-class knowledge solution.

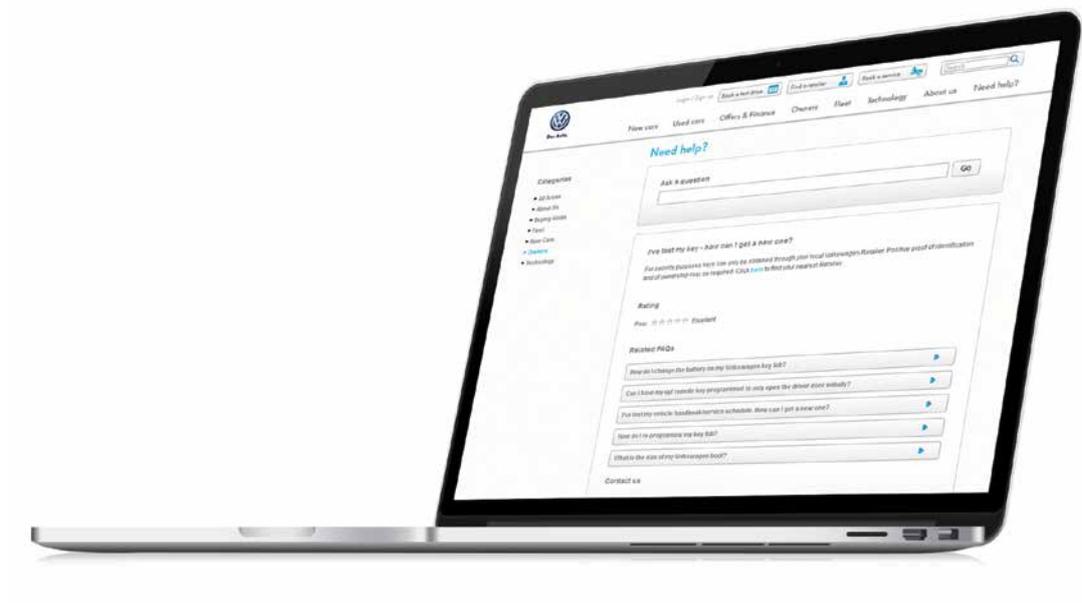


Figure 3: Prescience™ delivered on volkswagen.co.uk

2.3.2. Enterprise portals

Transversal has an out of the box web app integration with SharePoint portal, providing access to all its standard functionality directly within the SharePoint environment.

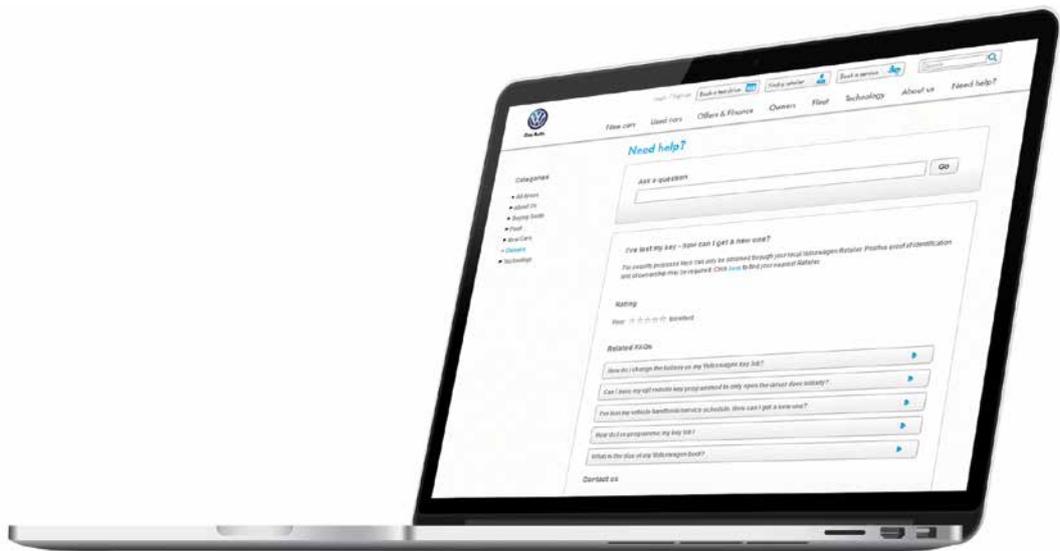


Figure 4: Prescience™ integrated into the SharePoint environment

2.3.3. CRM

Prescience™ can be delivered within SAP Interaction Centre. Knowledge articles are displayed directly within the service request creation page providing agents with recommended articles as they create new tickets.

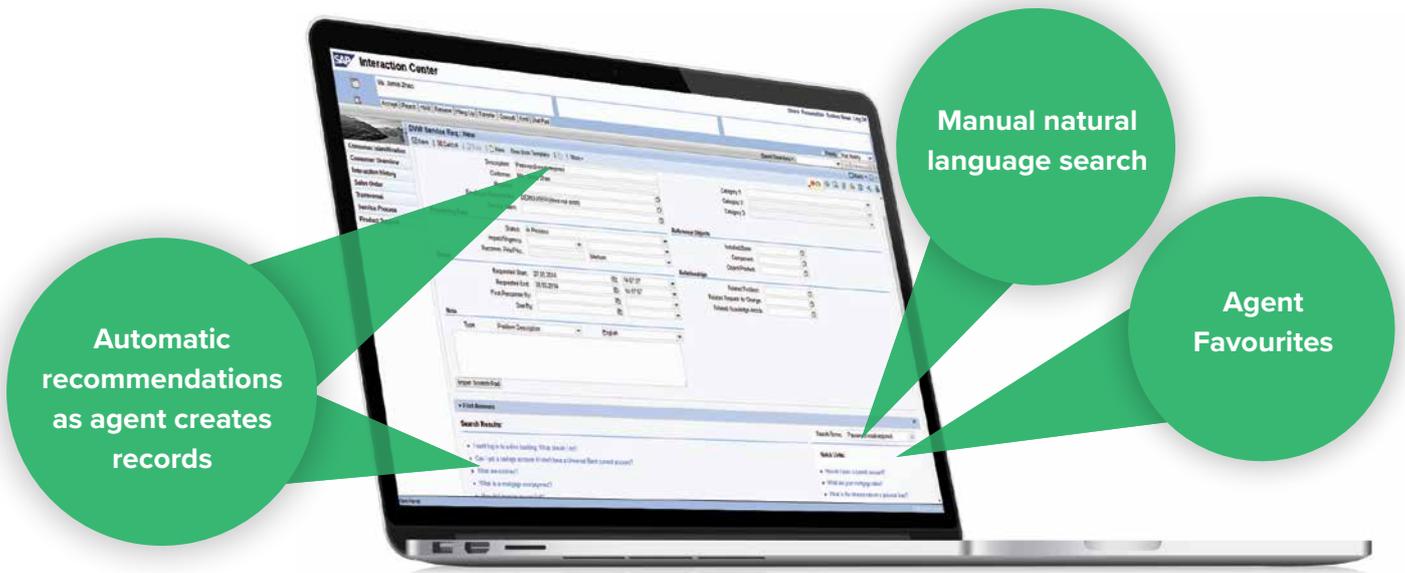


Figure 5: Prescience™ integrated into various different points in the SAP interface.

The system dynamically links together related content and allows feedback from the agent if they find errors or omissions.



Figure 6: An example of a knowledge article, related content and feedback functionality within the SAP interface.

Agents can see the current trending articles within the contact centre and suggest new articles from directly within SAP.

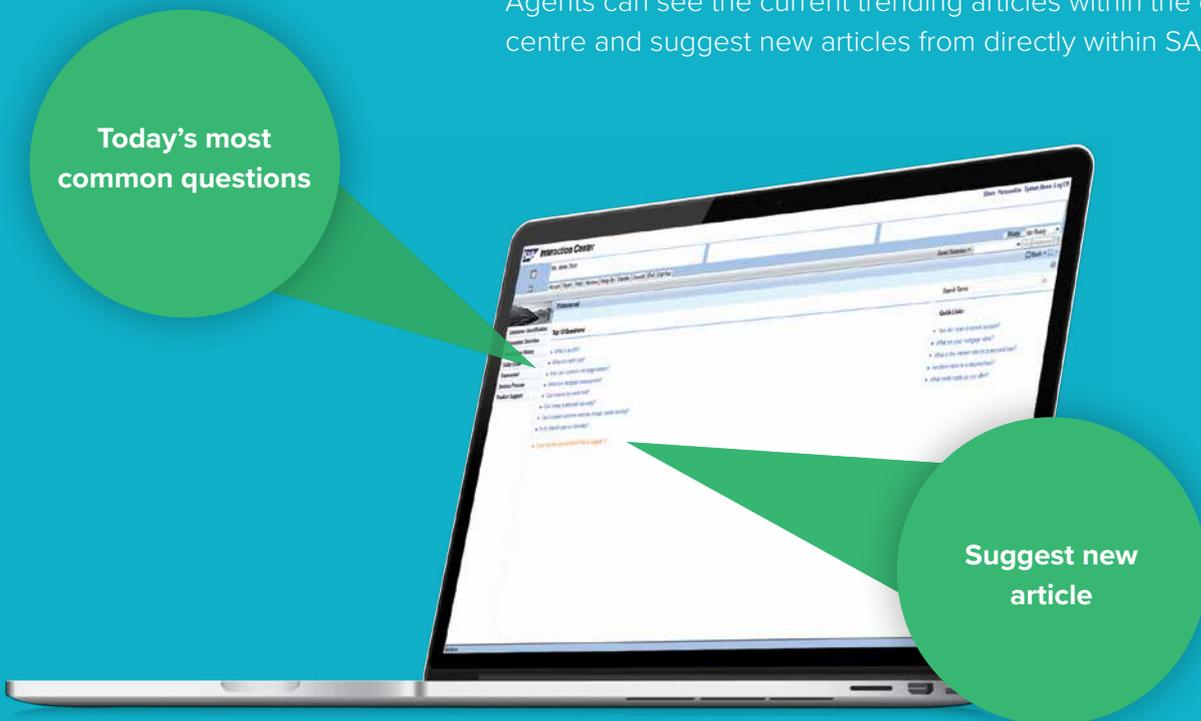


Figure 7: An example of the top 10 questions and suggest a solution functionality within the SAP interface.

2.3.4. Web chat

Prescience™ allows users to access the shared, centralized knowledgebase from directly within web chat clients, such as InstantService, Vivocha or LivePerson.



Figure 8: Access to the knowledgebase through a web chat client

2.3.5. Mobile apps

Clients such as Barclays run multiple access points from a single knowledgebase, including a number of separate web access points and mobile app integration. In the example below, note that the most popular questions reflect the context in which the request is made – automatically.



Figure 9: The FAQs for the Pingit service on the Barclays website and within the app itself.

Use of Barclays' trade marks by Transversal Corporation Limited is under licence from Barclays Bank PLC.



Figure 10: Transversal services embedded within the Barclaycard app for iOS and Android.

2.3.6. Multichannel customer engagement platforms

“Prescience integrates with a number of multichannel engagement platforms.”

Prescience™ integrates with a number of multichannel engagement platforms, including Genesys, Klick2Contact and Intelcom. In the example below, Prescience™ is being used to manage email and white mail templates for a Genesys system, providing an efficient means of moving from an initial customer query to a pre-prepared email response in just a few clicks.



Figure 11: Prescience™ managing email and white mail templates with Genesys.

3. User management

“...provides a **flexible toolkit** that can support a wide range of integration options...”

When integrating into an existing system, it is common to want to make use of the existing user and group permissions that have already been configured for that platform. User identity and group membership can be used to both limit and personalize the view of the knowledgebase for each user.

Transversal commonly supports this in one of three ways:

3.1. Remote authentication

Transversal includes the ability to support remote authentication of users, including credential checking and retrieval of group memberships. This allows existing user management services, such as LDAP or Active Directory, to be used to manage users on the Prescience™ platform.

3.2. Trusted entitlement

The Prescience™ platform is also able to accept remote pass-through of user credentials from a trusted source. For example, a system using a proprietary user management store that embeds a Transversal knowledgebase could pass details of the current user, their group memberships and their role with each request made. In both cases, the user permissions details can then be used dynamically to personalize the information they are shown.

3.3. Contextualization

In some cases the most appropriate option is to pass through just a limited set of metadata regarding the user, such as their location or role. This allows the information presented from the

knowledgebase to be refined so that it is contextually relevant to the user, without the need for personal information to be passed around or for complex authentication models to be implemented.

4. Bespoke integration

Although the above covers some common integration scenarios, the Prescience™ API provides a flexible toolkit that can support a wide range of integration options. For scenarios not covered here a bespoke integration plan can be created with the assistance of our Professional Services team.



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