How to Create FAQs for Espressive Barista

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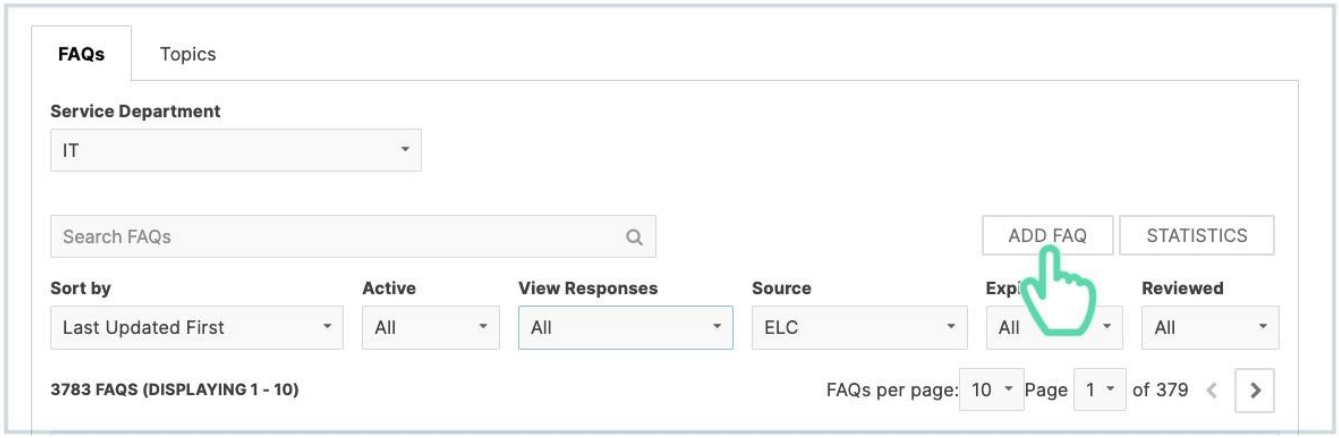
Creating FAQs

Follow these instructions to create a new FAQ for Espressive Barista:

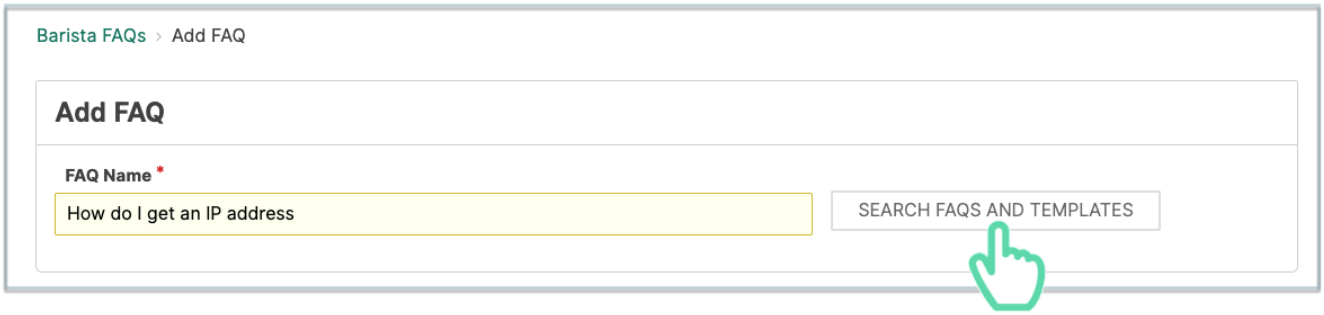
1. Open a browser and log in to your Barista environment: https://<TENANT>.esprssive.com/
2. Select **More** from the left-hand menu, then select **Admin**.
3. Hover your mouse over the gray left-sidebar to display the menu.
4. Select **Barista FAQs**.

   Note: Only FAQ Admins can access the Barista FAQ Dashboard.
5. Click on the **ADD FAQ** button.



6. Add a name to the FAQ and then click on **SEARCH FAQS AND TEMPLATES**.

   The best practice is to name it with a phrase similar to what an employee might ask Barista.



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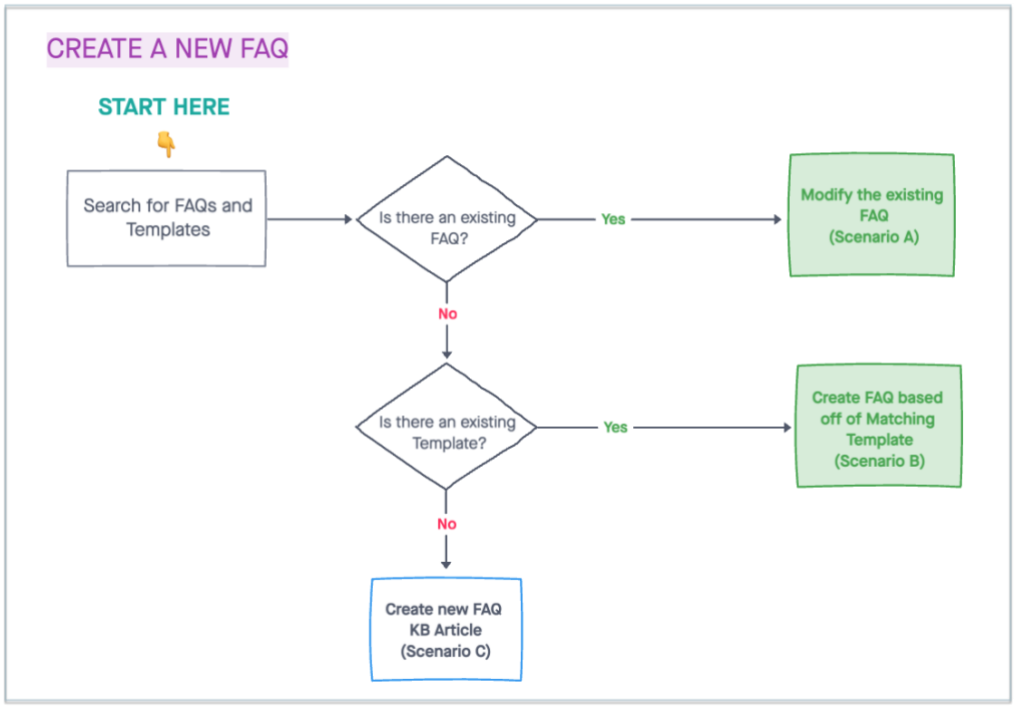
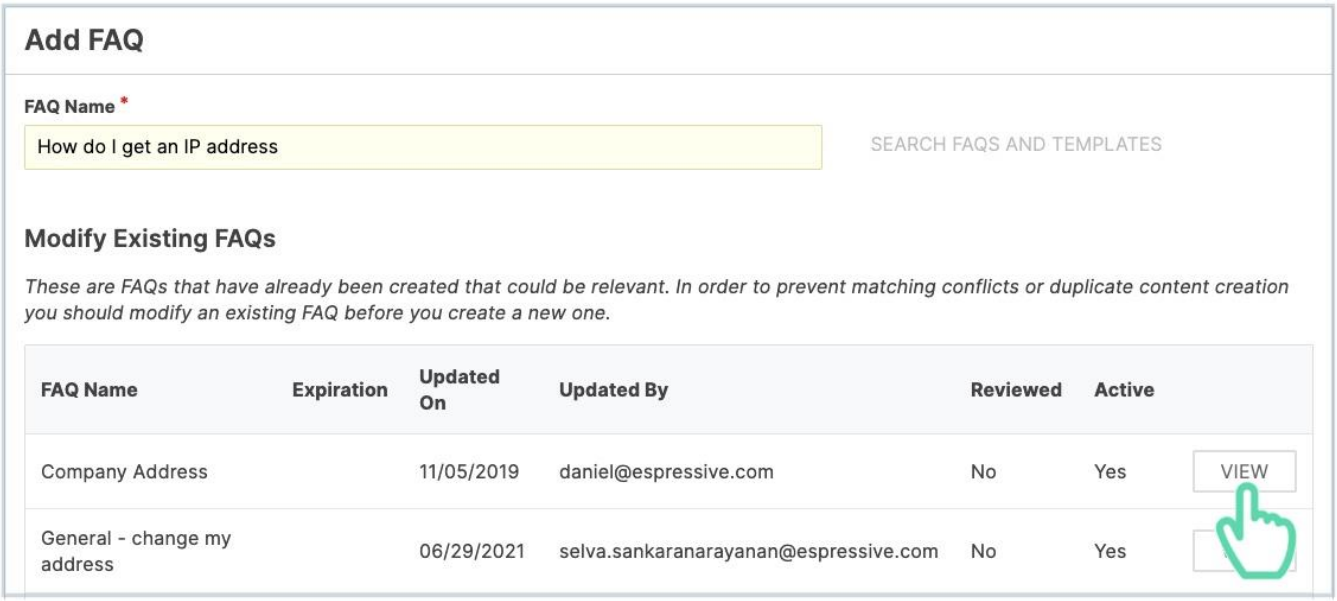
7. Check the diagram below to know which scenario to follow next (A, B, or C):



A. Modify the existing FAQ.

1. Click on **VIEW** to see the responses.
2. Add or modify the existing response.

   To edit the response, see the Editing Responses chapter.



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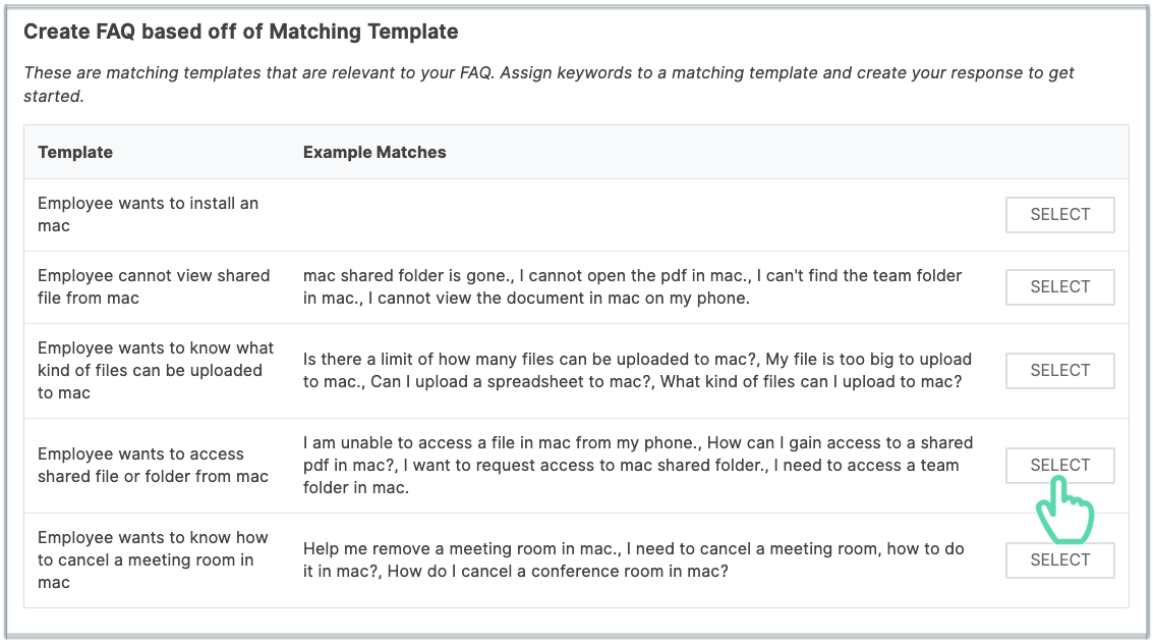
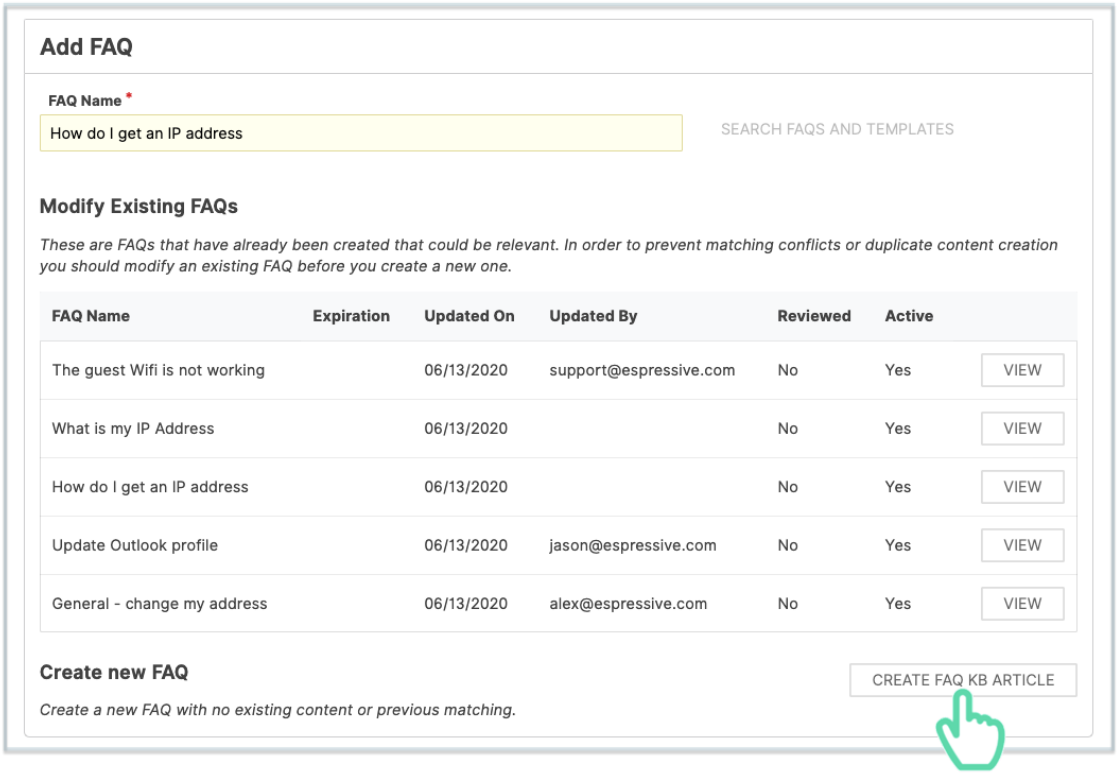
B. To create a new FAQ based on matching template, select the template that best fits your new FAQ. If there is no matching template, follow the instructions scenario C.



C. If the FAQ you need does not correspond to any of the existing templates or existing FAQs, you can continue by clicking on the CREATE FAQ KB ARTICLE button.



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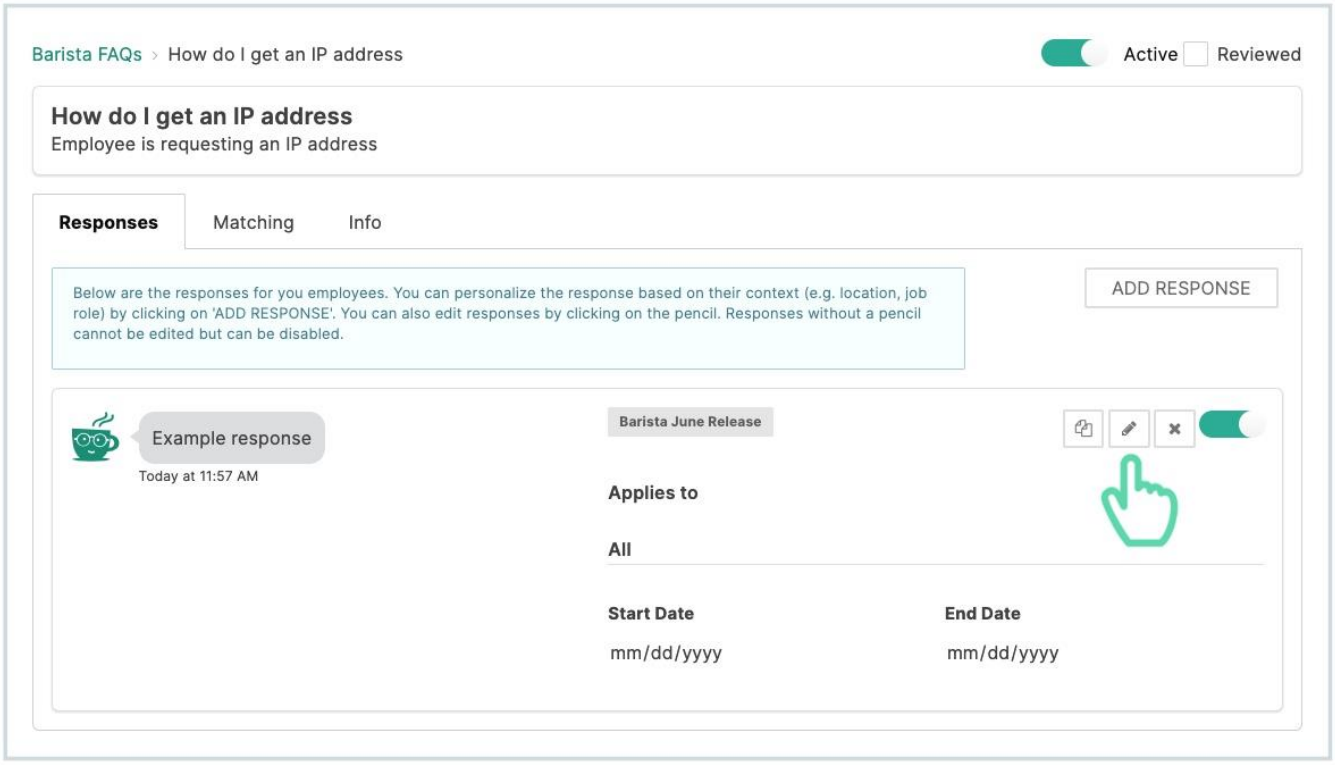
Editing Responses

On the **Responses** tab, you can see how your response will look in the Barista chat.

1. Change the title of your FAQ anytime you need by clicking on the **EDIT TITLE** button.
2. Before adding a response, check if there is already a **Response sample** for you to edit. If there is, just click on the **pencil** icon.



3. To **Delete** a response, click on the **X** icon.

   Note: You can only edit or delete responses that your organization has created, not ones created by the Employee Language Cloud (ELC). The gray label in the middle indicates if the ELC or someone at your company created the response.

4. To **Duplicate** a response, click on the **copy** icon.

   This tool is helpful when you want to save time by creating a new response that is similar to an existing one. For instance, you can duplicate an ELC response (that is not editable) to create a new response that you can then edit and fine-tune.

   *Note: Duplicating a response will not bring over any **Applies to** conditions.*

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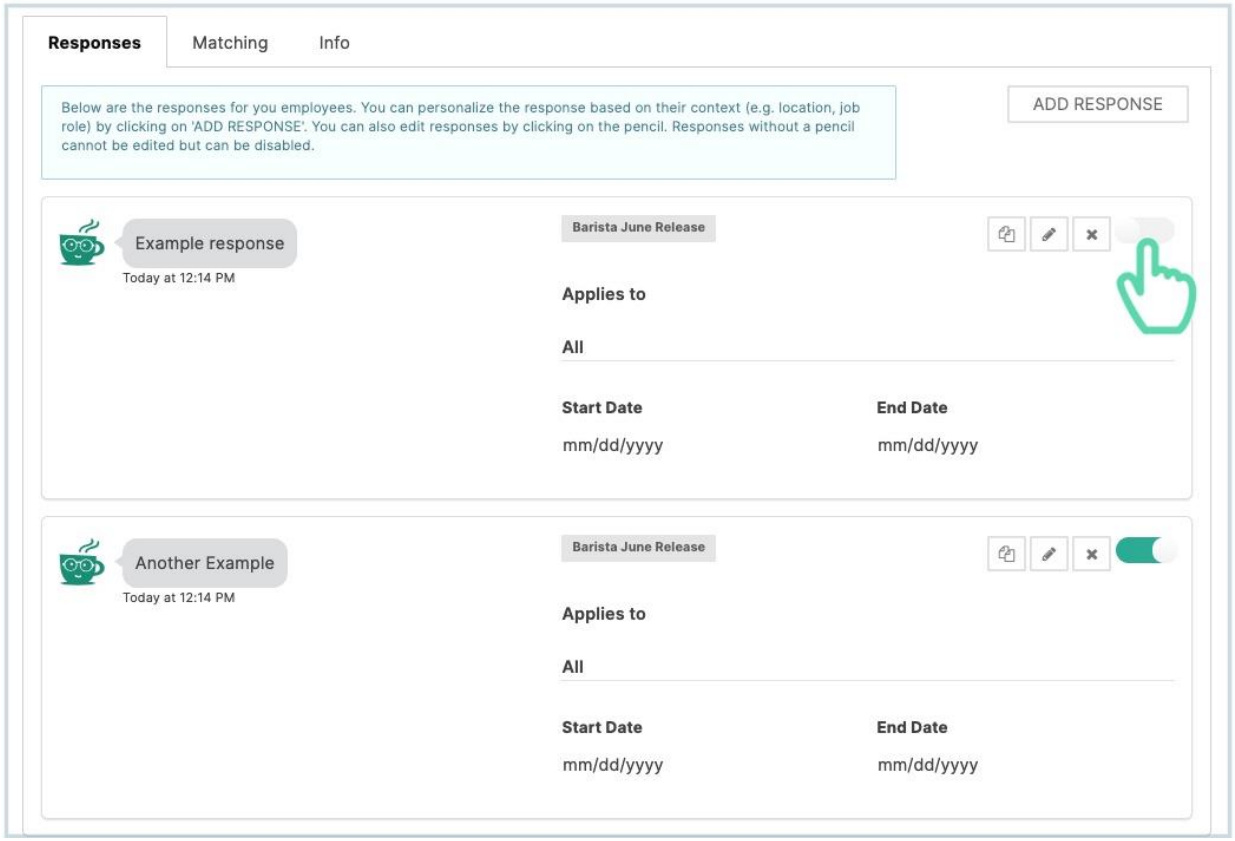
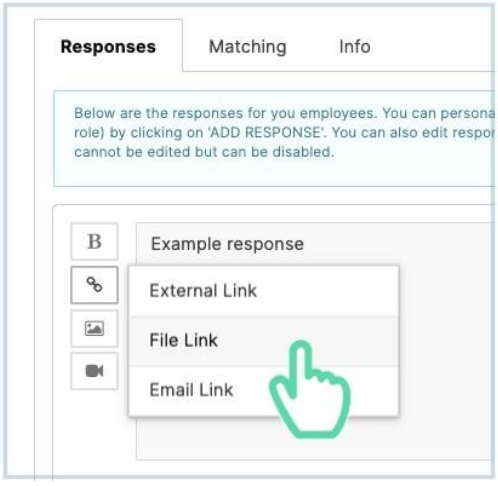
5. If there are many responses to an FAQ, you can disable a specific response by turning the **Active** button off on the right. When a response is disabled, it is entirely ignored by Barista, as if it doesn't exist.



6. Click on the **pencil** icon to edit the text or change the **Applies to** section.
   - On the left side of the text box of the response, you can select the **B** button to write in **bold.**
   - Add a link to your response by clicking on the **Link** button.

     A pop-up window will appear where you can select the type of link you want to add.

     - EXTERNAL LINK: Select this option to add a link to an external webpage or video. Enter the external link and define the text of your response that will lead to the link.
     - FILE LINK: Select this option if you want to add a file to your response. Click on the **folder** icon to search for the file on your computer. After selecting it, you can define the text of your response that will lead to this file.
     - EMAIL LINK: Select this option to enter an email address and then define the text of your response.



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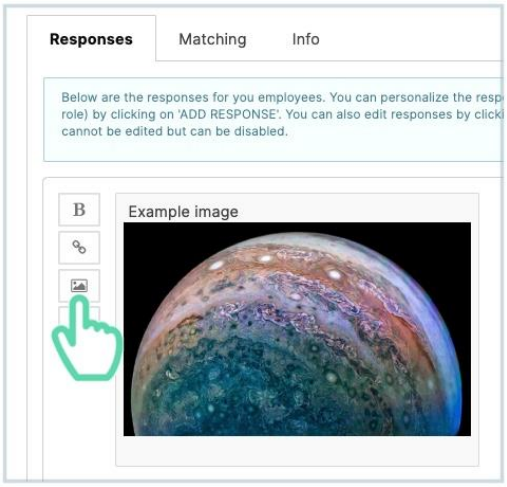
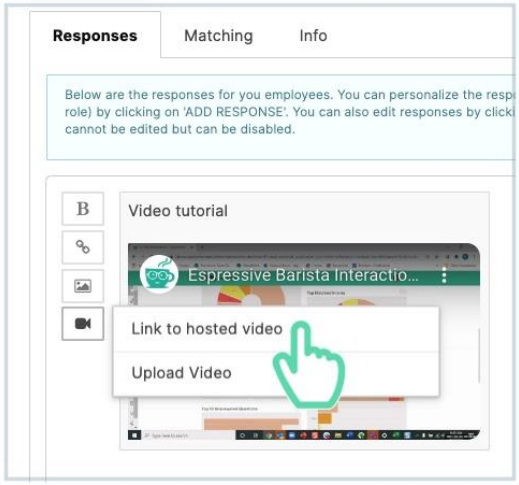
- Add an image to your response by selecting the **Image** icon.

  A pop-up window will appear where you can search for the images on your computer. After selecting it, click the **Open** button to add it.



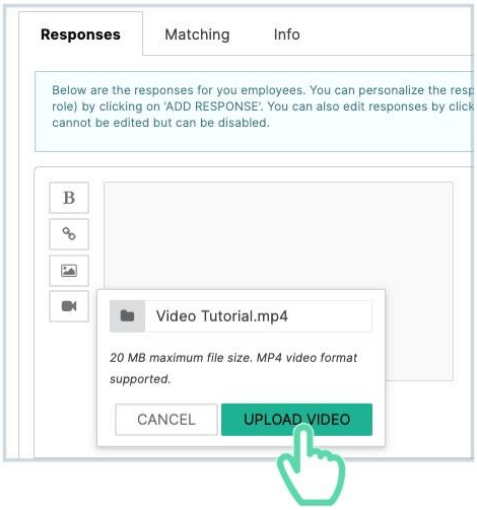
- Add a video from a link by clicking on the **Camera** icon. Just select **Link to be hosted video** then enter the URL of the video and click on **ADD VIDEO**.

  Note: Currently, only YouTube and Vimeo videos are supported.



- Upload a video form your computer by clicking on the **Camera** icon and then selecting **Upload Video**. A pop-up window will appear, where you can search for the video on your computer. After selecting it, click on **UPLOAD VIDEO**.

  Barista supports mp4 video formats and the maximum file size you can upload is 25 MB.



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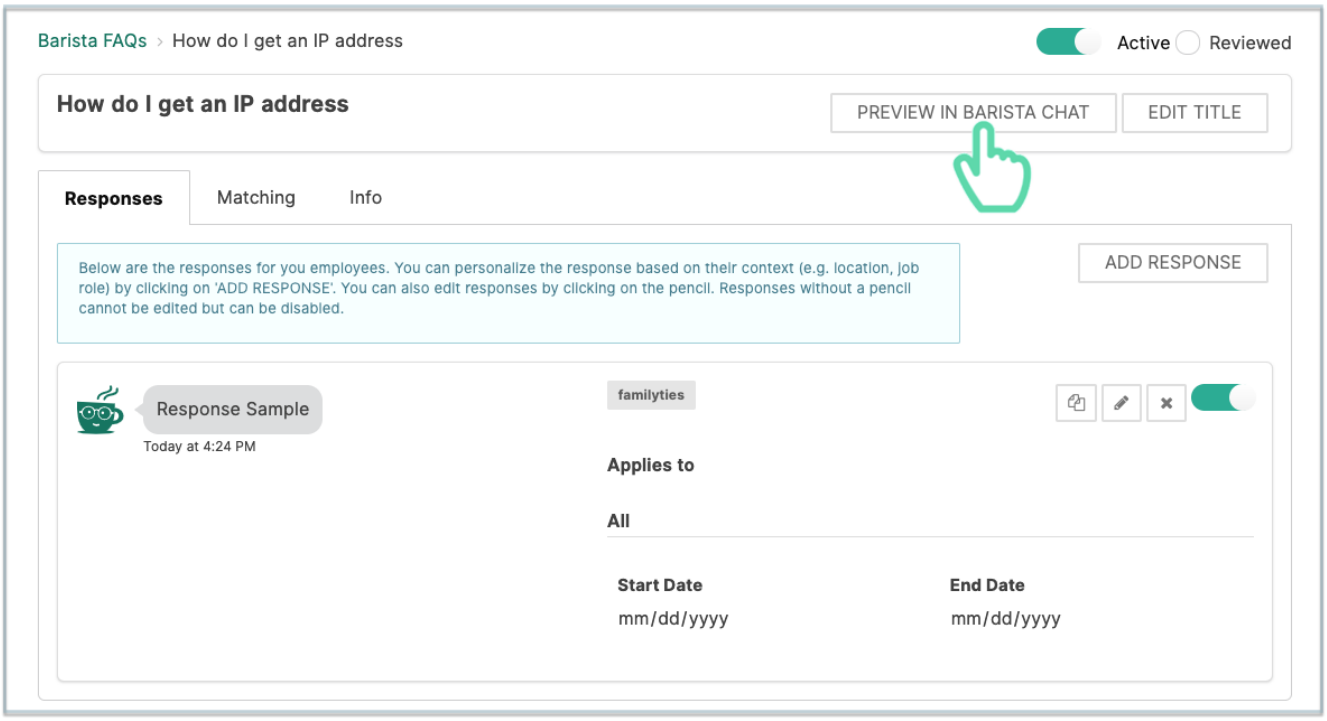
7. Click on the **PREVIEW IN BARISTA CHAT** button to launch Barista in a new window and validate your FAQ.

   This is a quick way you can test the matching of your FAQ based on the title and the content of your response.



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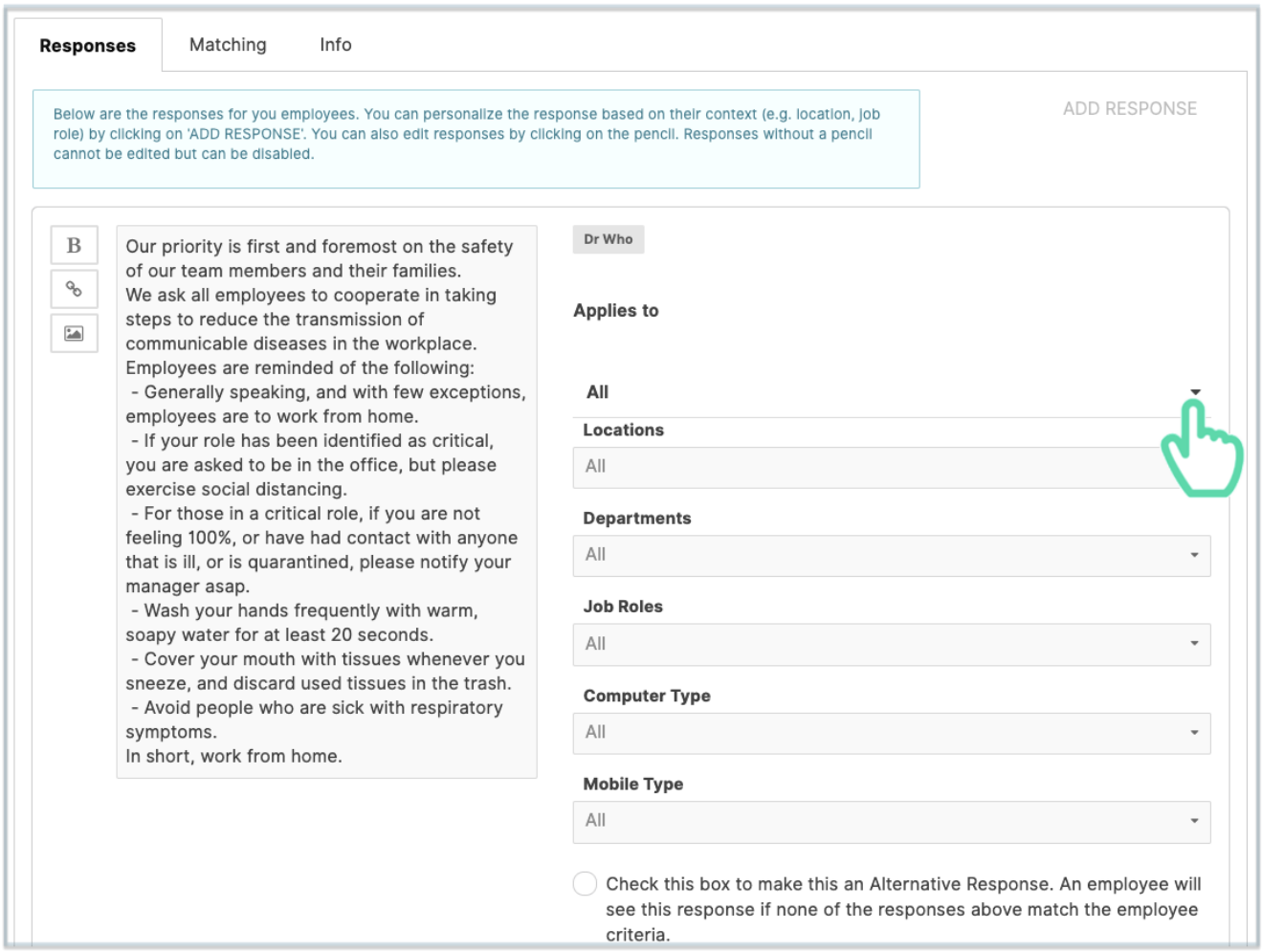
Setting the 'Applies to' Section for FAQs

1. Click on the arrow next to **All** to display the **Applies to** conditions.
   Filling out this menu is optional. If you do not fill it out, by default, it will show the response to everyone,
   Note: If your FAQ does not have a Matching Wizard template, it will not respect the conditions you add here. Learn how to add a template in the Matching FAQs chapter.



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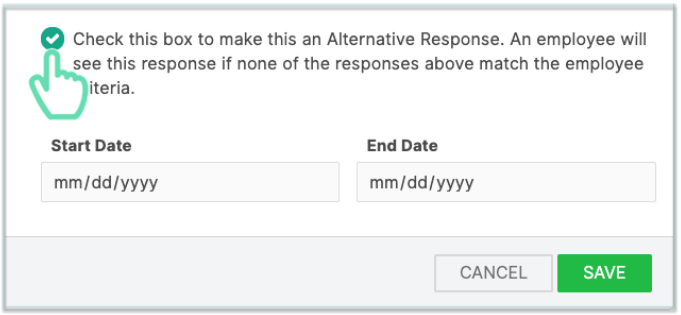
2. Target the response by specifying the following options:

Target Option	Description
Location	l allow you to target the response to employees from a specific work location. On nu, you can select more than one location if needed. *Note: When you choose a location, it also includes any locations inside that location. For example, if you choose a building, it will include all the floors and offices inside that building.*
Departments	This will allow you to target the response to employees who belong to a specific department. You can select more than one, as well as choose higher-level departments that include lower levels.
Job Roles	This will allow you to target the response to employees that have a specific job role. You can select more than one.
Computer Type	This will allow you to target the response to employees that have a specific type of computer, such as a Mac or Windows computer.
Mobile Type	This will allow you to target the response to employees that have a specific type of mobile device, such as an iPhone or Android phone.

3. Click on **SAVE** after editing or adding responses and specifications.

4. Mark the checkbox below the **Applies to** menu if you want to mark it as an **Alternative Response**. This is useful when you have a specific response that you have defined with **Applies to** conditions, but also want to make sure you have a targeted response for everyone else. For instance, in the FAQ for company holidays, you can have a unique response for US employees, another unique response for Mexico employee, and a default response for everyone else with this option selected.



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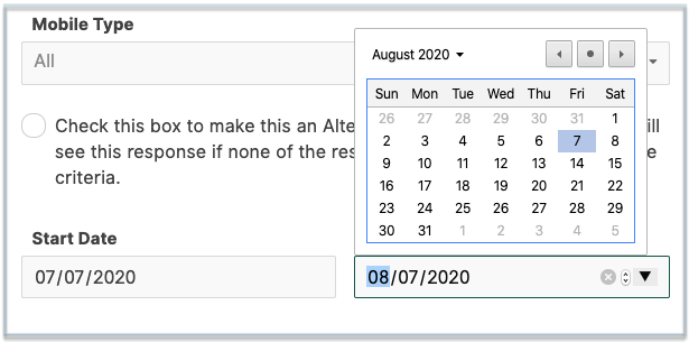
5. Enter a **Start Date** and **End Date**. This will allow you to set the time that your response will be active. If you do not define this setting, the response will be displayed all the time.



   - Selecting a **Start Date** but not an **End Date** will show the response from the day you set it without expiring. This allows you to schedule a response in the future.
   - Selecting an **End Date** but not a **Start Date** means the response will be active from now until the end date you set.
   - Selecting a **Start Date** and an **End Date** will define the date window your response will be active.
   - You can also fix a **Start Date** and an **End Date** for a specific time of a response, and then set a new response with a **Start Date** beginning on the **End Date** of the previous response, to roll over. This way, when one response ends, the other will begin.

6. Click the **SAVE** button when you finish adding conditions.

Matching FAQs

Using Standard Matching vs Using the Matching Wizard

Using the standard matching is easier because it uses the title, the content of the response, and the additional descriptive text to match the FAQ to the employee phrases asked to Barista. The disadvantage is that, if there are many similar articles with similar content, Barista may have to show the employees multiple results, and the employee would have to choose.

The Matching Wizard uses a template instead of the content of the FAQ. Templates correspond to language patterns that include many variations of similar phrasing. Assigning a template is a way you can match your FAQ to an employee phrase asked to Barista more accurately. It also has a slightly improved experience where Barista will show only one answer because we are more confident in the results.

We recommend you use the Matching Wizard for your FAQ, if there is a corresponding template. However, if your FAQ does not have a template, then the standard matching will work.

For example, if your FAQ is about “X application is slow,” there is already an existing corresponding template for software being slow. However, if your FAQ is about “How to turn off notifications for X application” and we don’t have a template, in that case, you should use the standard matching.

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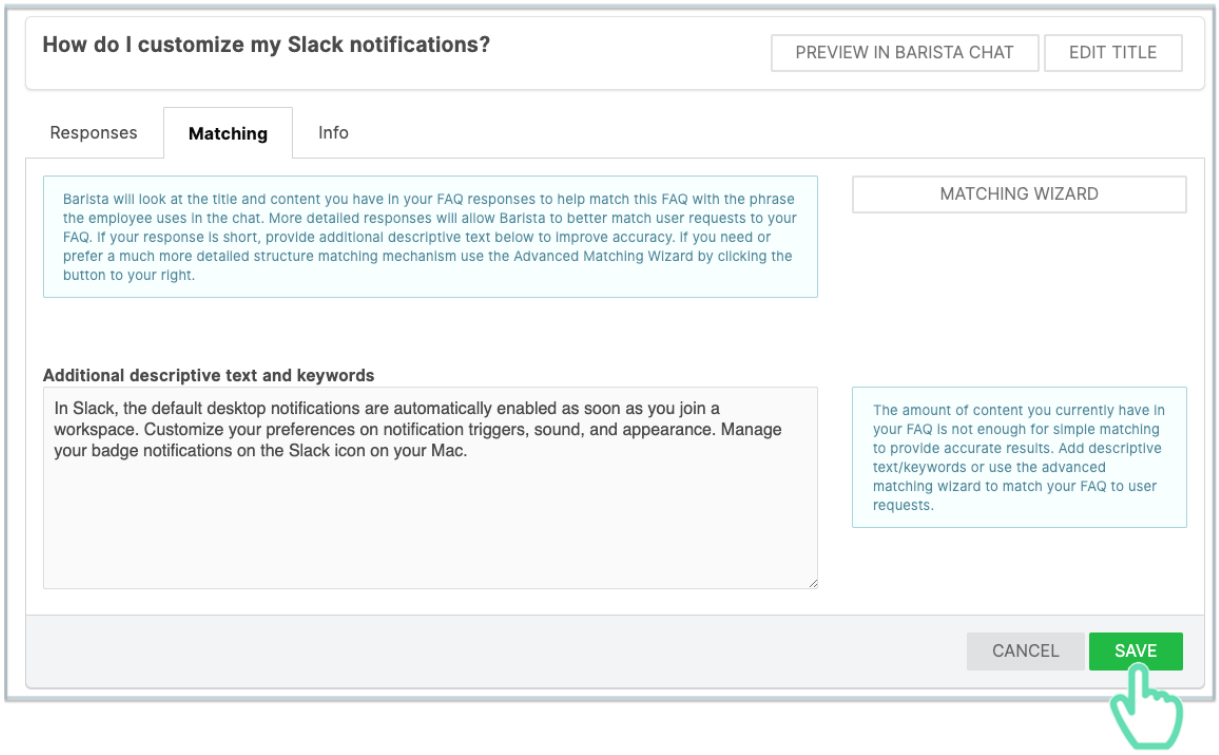
Note: This is only for FAQs that your company has created. You cannot edit the matching FAQs that originate from the Employee Language Cloud (ELC), but you can disable them.

On the **Matching** tab:

1. Click on **ADD DESCRIPTIVE TEXT** to type keywords or a small paragraph about the content of your new FAQ (this is optional). The information you type here will help your new FAQ to match to employee questions that are being asked to Barista.

   Note: If you selected a template at the beginning of creating the new FAQ, this option won't show up.

2. Click on **SAVE** after adding a description.



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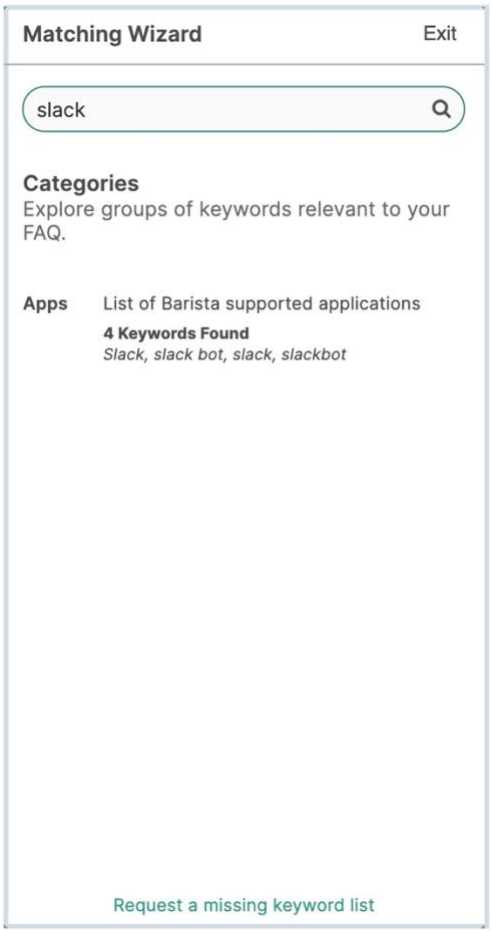
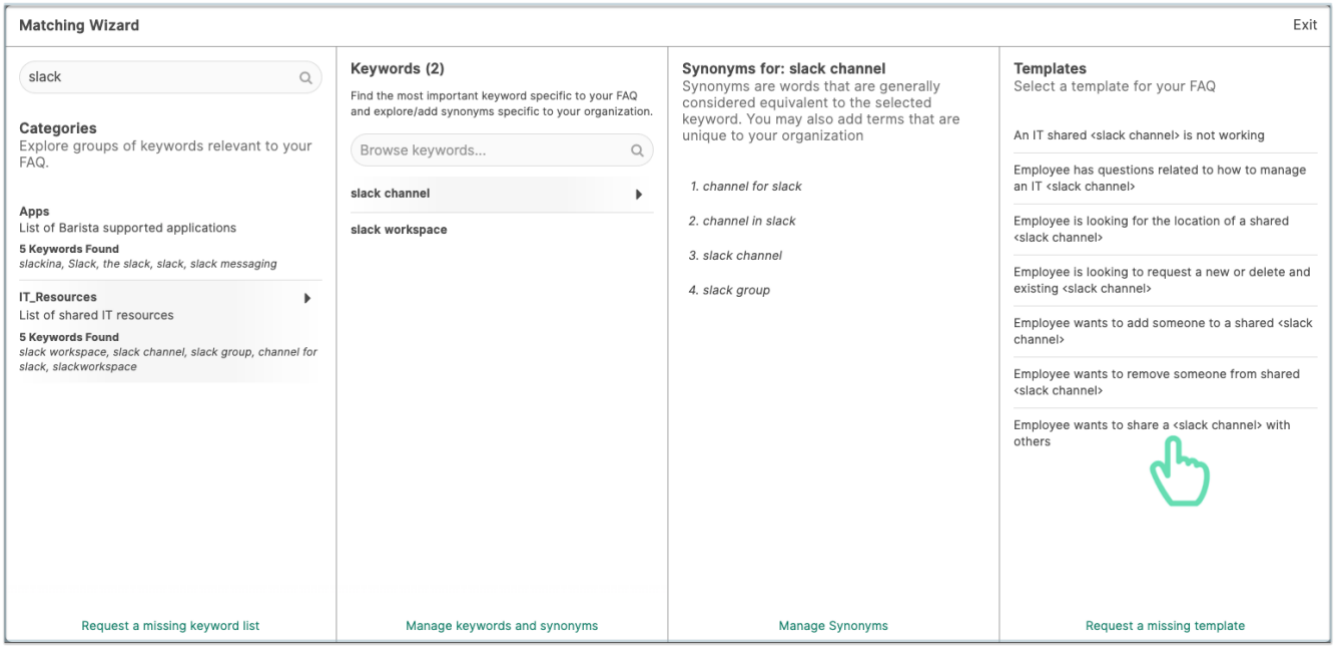
Using the Matching Wizard

To assign a template:

1. Click on the MATCHING WIZARD button.
2. Select a **Category** and then a **Keyword** in order to see the available Template. For example:
   - If your FAQ is related to installing a printer, you may want to search for “printer” and select IT_Resources as the Category.
   - If your FAQ is about how to manage a Slack channel, you may want to search for “Slack” and select either Apps or IT_Resources as the Category, depending on the content of your FAQ.
   - If your FAQ is associated with a company holiday, you may want to search for “holiday” and select either HR_Holidays or HR_Benefits as the Category, depending on the content of your FAQ.



3. Select the **Template** that best fits your FAQ.



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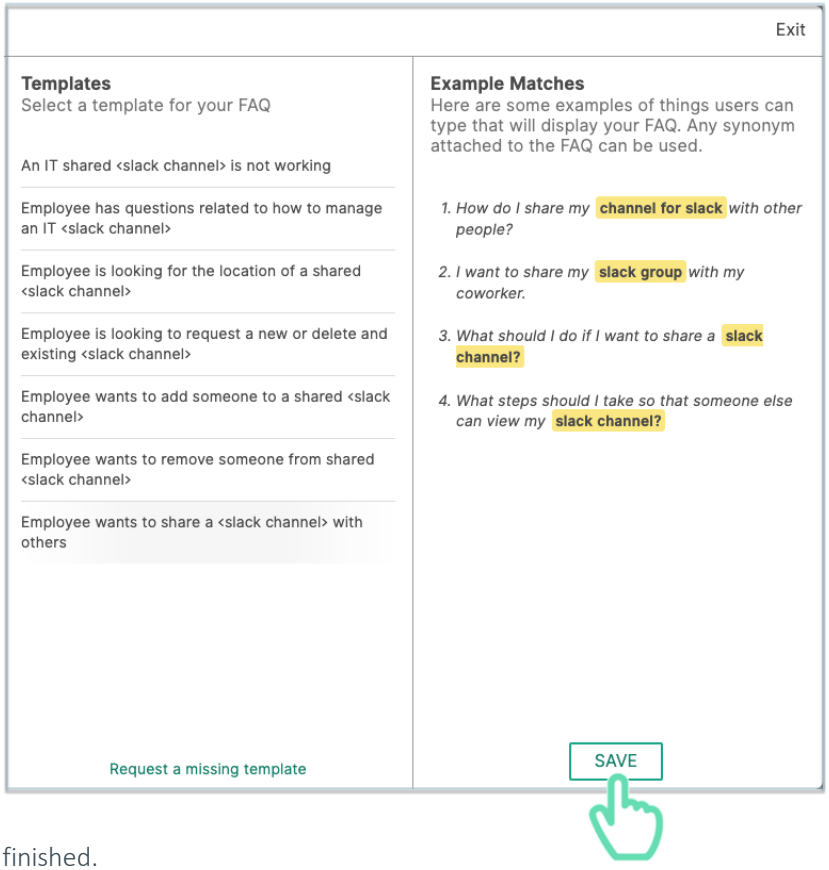
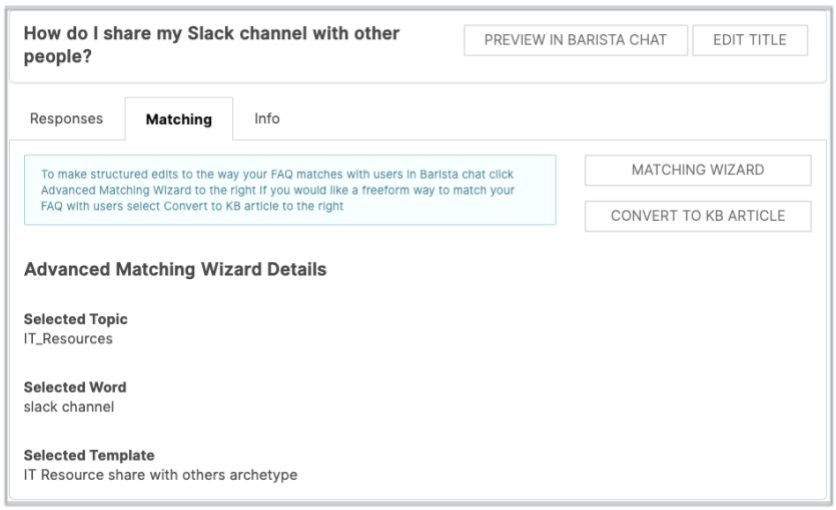
4. See the **Example Matches** that users can type that will display your FAQ when selecting this Template.



5. Click **SAVE** when finished.
6. Now you will see your configuration on the **Matching** tab:
   - SELECTED TOPIC: Here you will see the chosen Category.
   - SELECTED WORD: Here you will see the chosen Keyword.
   - SELECTED TEMPLATE: This is the name of the chosen template for your FAQ.



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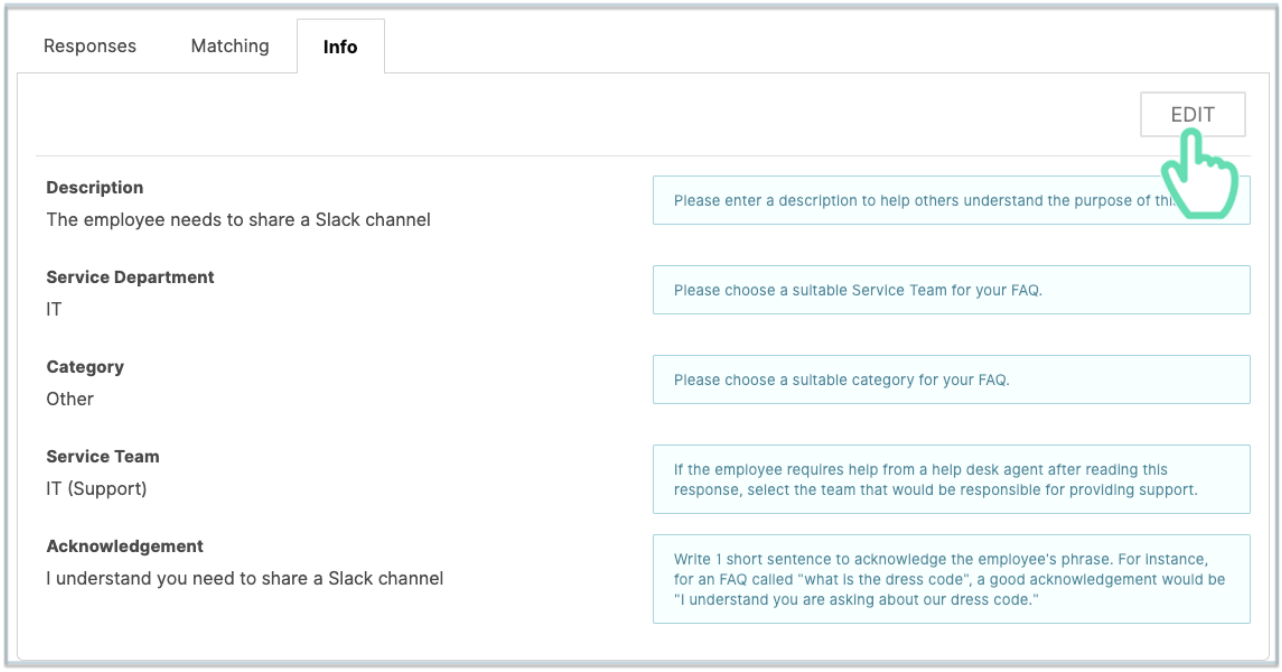
7. On the **Info** tab, you will see the **Description**, **Service Department**, **Category**, **Service Team**, and **Acknowledgement** information previously assigned. To make changes, click on the **EDIT** button.



Options to Edit	Description
Description	Here you can edit the description that helps others understand the purpose of the FAQ you are writing.
Service Department	The Service Department determines which department owns the FAQ. *Note: Changing this will also change the routing rule for the FAQ from Barista.*
Category	This allows you to enter or change the Category of the FAQ. *Note: Your Espressive Admin defines all the Categories.*
Service Team	The Service Team determines which assignment team or group owns the FAQ. *Note: Changing this will also change the routing rule for the FAQ from Barista.*
Acknowledgement	This is a short sentence that Barista will say in order to acknowledge what the employee is asking about. For instance, for an FAQ called, “What is the dress code,” a proper acknowledgement might be, “I understand you are asking about our dress code.”

8. Click on **SAVE** after editing or adding all the information.

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Helpful Keyword List

Options to Edit	Description	Example Words
Apps	List of common apps in the market today.	▪ Salesforce ▪ Microsoft Outlook ▪ Zoom ▪ Slack
IT_Devices	Main technology devices provided to employees.	▪ Laptop ▪ Monitor ▪ Mac ▪ Keyboard
IT_Accessories	Typically, complementary items and consumables that work with devices.	▪ Docking Stations ▪ Dongles ▪ Cables ▪ Batteries
IT_Resources	Resources or generic services provided by IT.	▪ Mailing List ▪ Printer ▪ Calendar
IT_Network_Resources	Used specifically for internet or network related resources.	▪ Wi-Fi ▪ Guest Wi-Fi
IT_error_msg	For creating FAQs to respond to specific error messages.	▪ Unable to connect to email server
IT_MailList_Names	Used for recognizing mailing list related intents, where employees might mention a mailing list.	▪ SalesUS ▪ NA_All_Emp
IT_List_ReportNames	Used for recognizing topics and issues related to reports.	▪ TPS Report
IT_emaill_topics	Used for recognizing topics and issues related to email.	▪ BCC ▪ Signature
IT_Policies	List of IT policies for questions and FAQs where the policy is mentioned.	▪ BYOD policy
IT_App_Addons	List of application components related to integration.	▪ Plugin ▪ Tools ▪ Players ▪ Add-in
IT_Office_Topics	List of office suite related topics to help with issues.	▪ Worksheet ▪ Pivot Table

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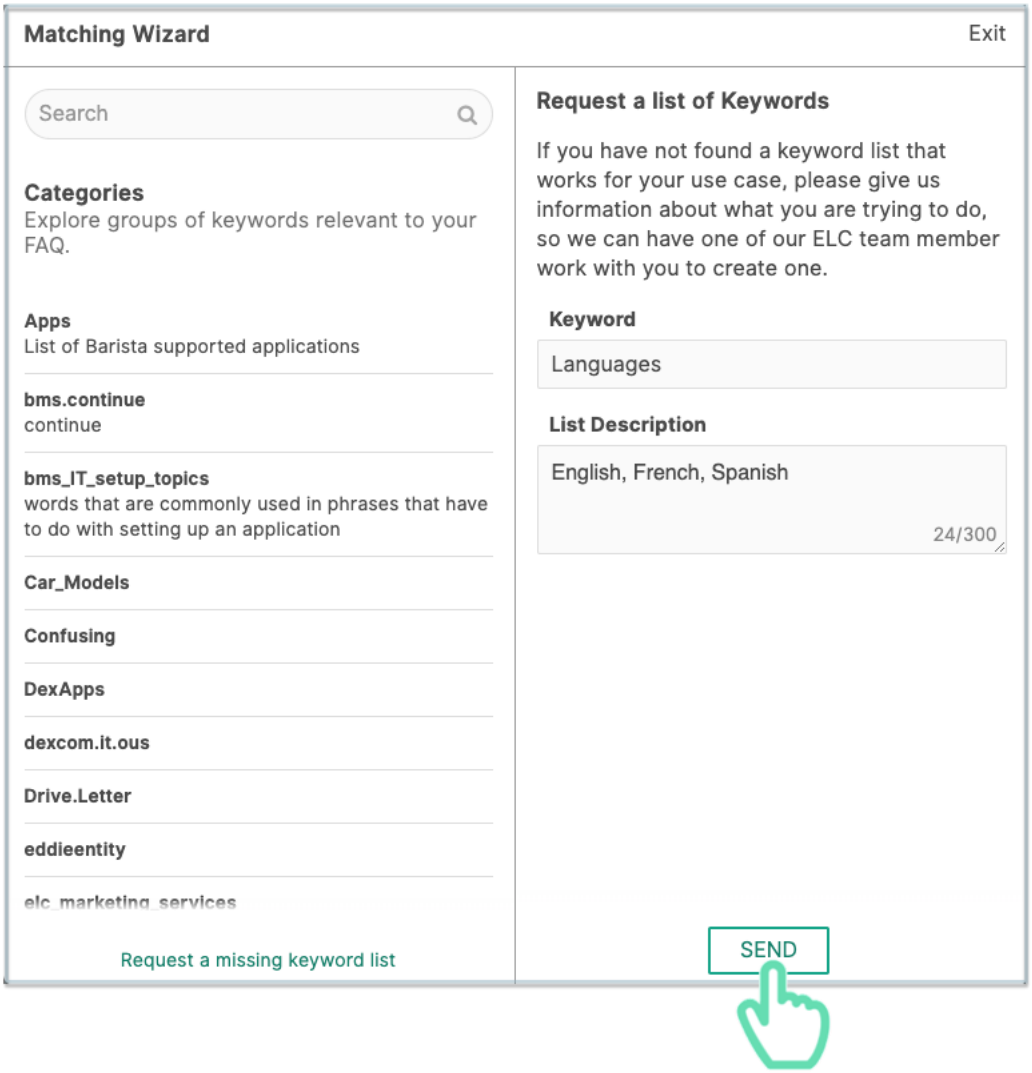
How to Request a New Keyword List for the Matching Wizard

It is possible that, when browsing the available Categories, you don't find the right Keyword List for the FAQ that you have in mind. When this happens, you can ask the Espressive Admin of your company for help. If it seems like the Employee Language Cloud library (available to all customers) would benefit from a new standard list, you can request it by following these steps:

1. Go to the **Matching** tab of the FAQ and click on the **Matching Wizard** button.
2. Click on **Request a missing keyword list** located at the bottom of the menu.
3. Enter the **Keyword** you need and a **List Description** so we can have one of our Employee Language Cloud team members work with you to create one.
4. Click **SEND**.



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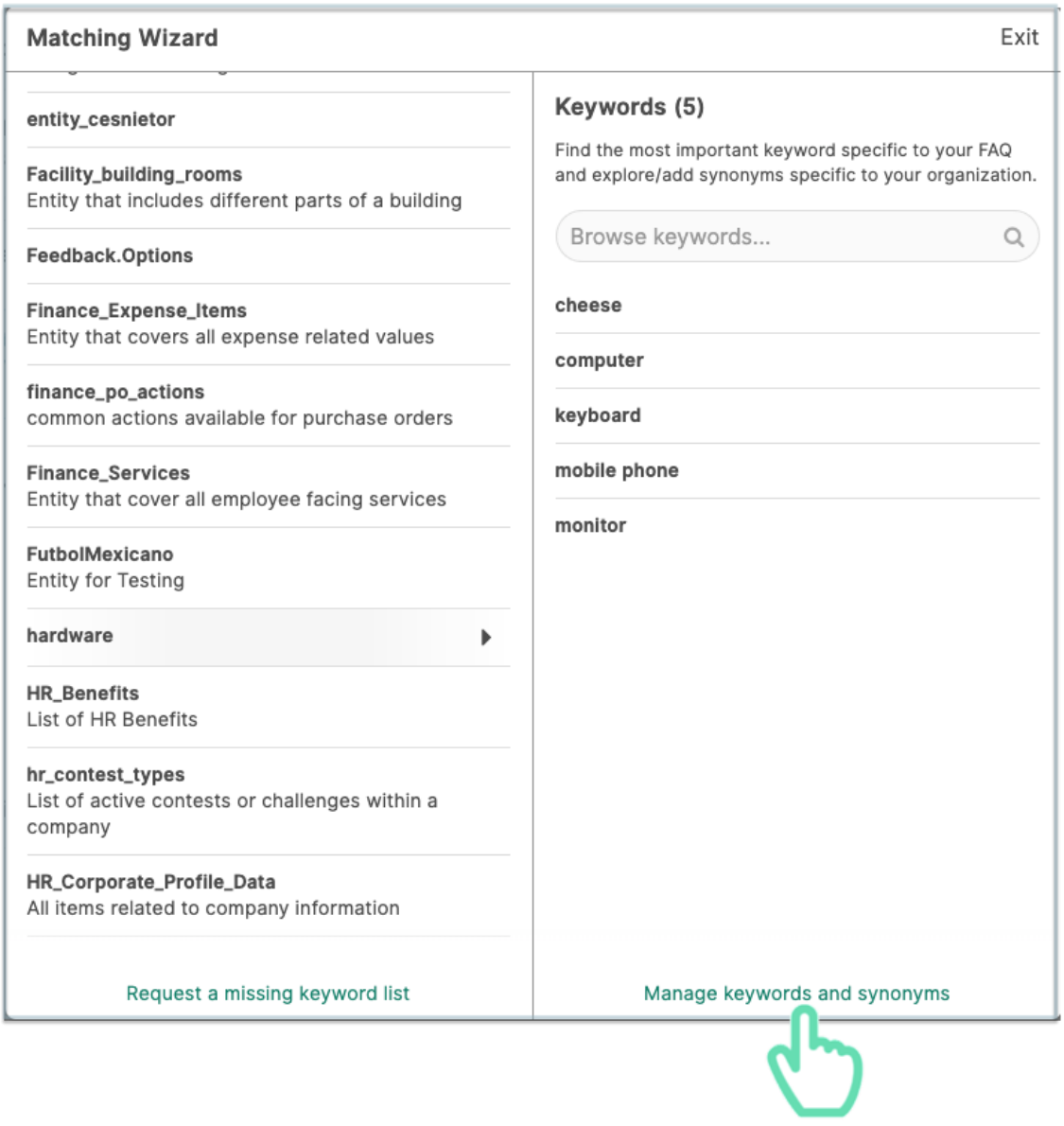
Expanding a Keyword List

If you find a Keyword List you need, but you do not see the specific Keyword you are looking for, you can add it to the list. To do so, go to the menu after selecting **Category** and click on **Manage keywords and synonyms** located at the bottom of the list.

Here you can add or edit Keywords.



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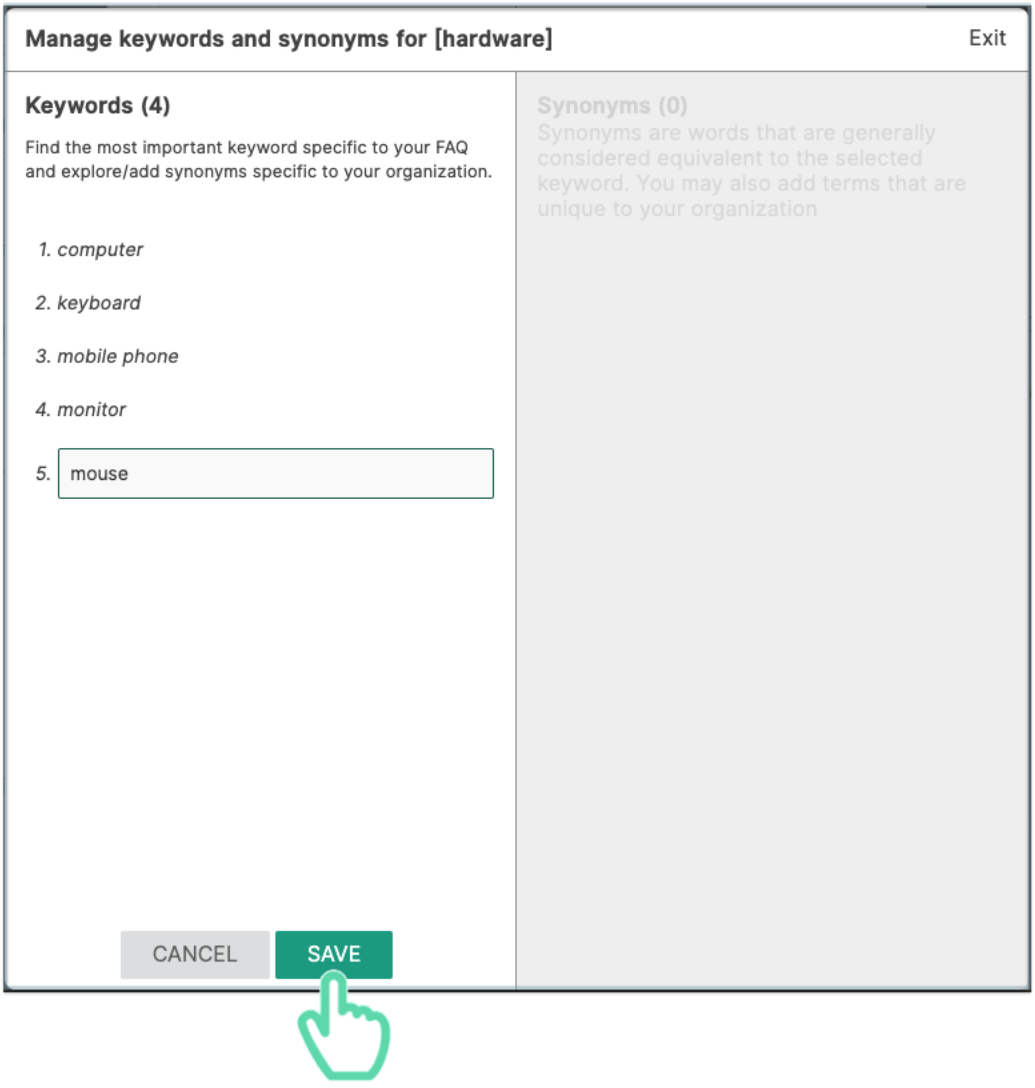
To edit the keywords:

1. Click on the **pencil** icon next to the word to retype it.
2. Click on the **X** button to delete a Keyword.
3. Click on the **ADD** button to add a new Keyword.

   To add, type in the new Keyword and then click on **SAVE**.



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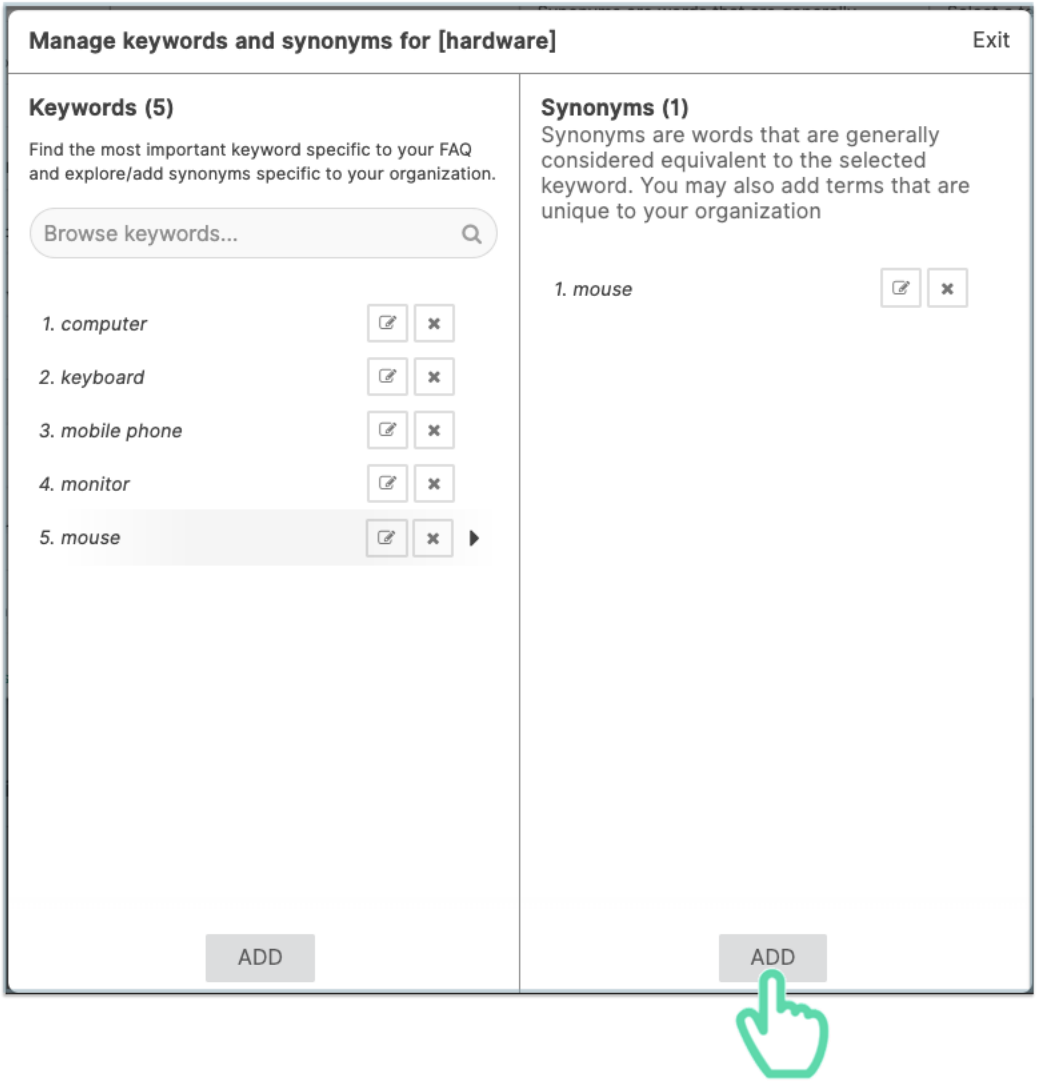
4. After you add a new Keyword, it will automatically be added as a Synonym. If you want to add another **Synonym** to the list, click on the **Add** button on the Synonym menu.



5. Enter the new Synonym or the alternate spelling of the Keyword, and then click on **SAVE**.
6. After you finish adding new Keywords and saving them, click **Exit**.

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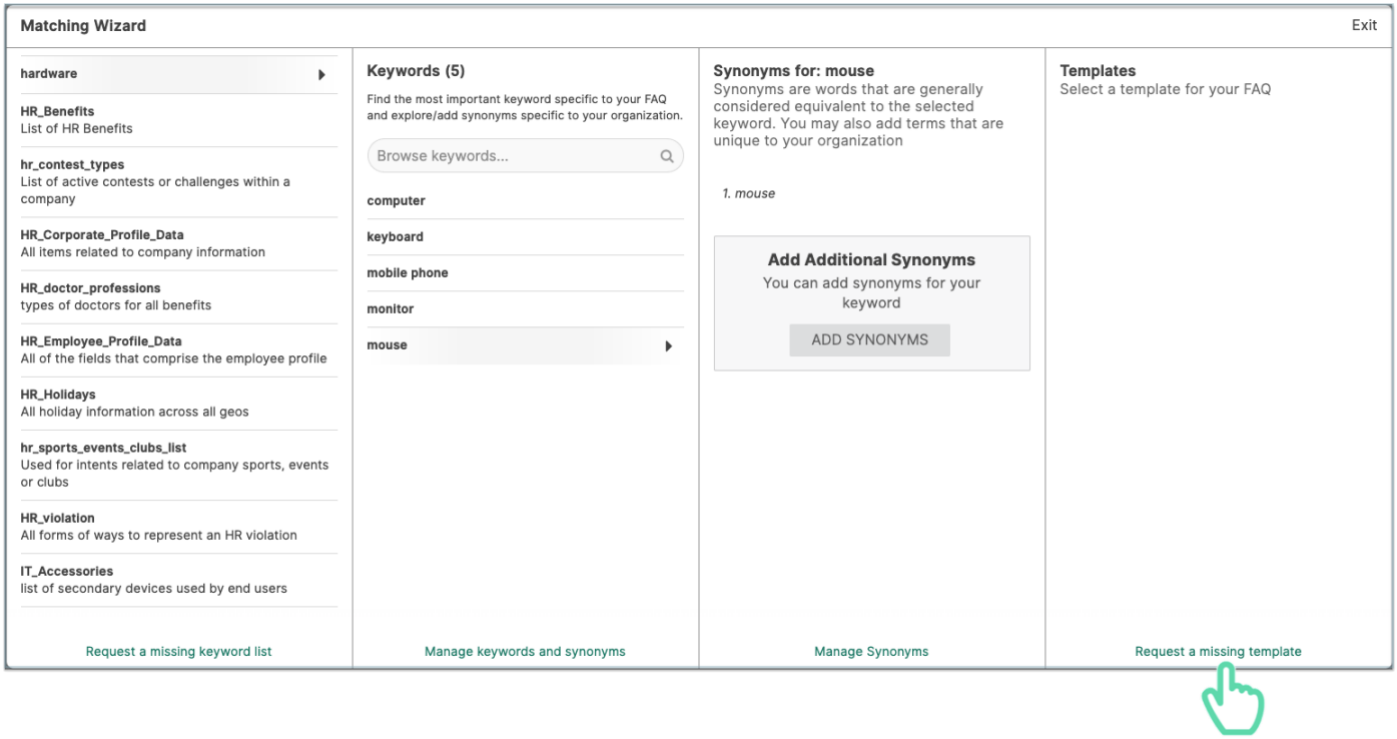
Requesting a Missing Template

It is also possible that, after selecting or adding the correct Keyword from a Keyword List, you do not see a template that corresponds to the intent of your FAQ. If this is the case, you should not just pick any other template. Instead, you can ask your Espressive Admin to create a template for you, or if the template seems like it could benefit other people, you can request a new template from the Employee Language Cloud team.

To request a new template:

1. Click on **Request a missing template** on the bottom of the **Templates** menu.
2. Add a description and example questions.
3. Send the request so the ELC Team can create a new template for you.



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Dos and Don’ts When Creating a New FAQ

Dos	Don’ts
When there is no matching Template, do use the standard matching.	Don’t make similar FAQs that may compete with each other.
Do have many responses when you have unique answers for different sets of employees.	Don’t create a different response because your response is long.
Do make sure to choose a Template that best suits the intention of the FAQ.	Don’t select a template that does not align with the intention of the FAQ.
Do browse the existing Keyword Lists, Keywords, and Synonyms before adding new ones.	Don’t risk adding a duplicate word or list, which might confuse Barista.

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