

Knowledge Management

Managing and Using the Knowledge Base

Table of Contents

1	Introduction	4
1.1	Purpose of the Document	4
1.2	Addressees of the Document	4
1.3	Remarks on the Content of this Document	4
1.4	Overview of the Knowledge Management	4
2	The Structure of a Knowledge Base Article	5
2.1	Tabs	5
2.1.1	Overview	5
2.1.2	Details	7
2.1.3	File Attachments	8
2.1.4	Rating	8
2.1.5	History	8
2.1.6	Actions	8
2.1.7	Revisions	9
2.1.8	Tickets	9
2.2	The Functions of the Top Menu	10
2.2.1	File	10
2.2.2	Workflow	10
3	Creating, Deleting and Exporting Articles	11
3.1	Manually Creating an Article	11
3.2	Creating an Article from a Revision	11
3.3	Generating an Article from a Ticket	11
3.4	Deleting an Article	12
3.5	Exporting an Article	12
4	Article Actions	14
4.1	Publishing Articles	14
4.2	Checking Articles	15
4.3	Revising Articles	15
4.4	Workflow Actions	16
5	The Search	17
6	Managing the Knowledge Base	18
6.1	Knowledge Categories	18
6.1.1	Deactivating a Category	19
6.2	Knowledge Schemas	19

7	Statistics and Change Management	22
7.1	Statistics	22
7.2	Change Control	22

1 Introduction

1.1 Purpose of the Document

Xpert.NET is a very dynamic help desk solution that can be configured in nearly every direction. Daily routine and experience have shown that, while most administrators familiarize themselves with the most important modules and configurations after some time, many questions remain unanswered and much potential unused, due to a lack of knowledge.

This document is supposed to help you with the orientation in the *Knowledge Management* module. For this purpose, it will describe the configuration as well as its integration into the entire *Xpert.NET* system step by step.

1.2 Addressees of the Document

This document mainly addresses administrators.

Nevertheless, end users may also find helpful advice on handling the module here. As an administrator, you can compile a slim document for your end users by leaving out passages only necessary for the administration of the module. We have, however, smaller, slimmer documents for users and members of support available.

1.3 Remarks on the Content of this Document

In this document, all kinds of functions of the module *Knowledge Management* will be named and described. The functional range can, however, fluctuate due to configuration, licensing, and versioning. If you miss certain functions listed in this document in your *Xpert.NET* installation, please contact our support directly.

1.4 Overview of the Knowledge Management

The completely web-based, interactive Knowledge Management module with a full text search, rating, ranking, etc. is used for the management of an integrated knowledge base. As an additional module, it expands the functions of *Xpert.NET*. In this documentation, all available functions will be described.

In Chapter 2 the structure of a typical knowledge base article with its various tabs in the side bar will be illustrated. Chapter 3 focuses on creating, exporting, and deleting individual articles. In the following Chapter 4, the various available article actions will be detailed. The search options in the knowledge base can be found in Chapter 5. Chapter 6 describes the management of the knowledge base.

2 The Structure of a Knowledge Base Article

The structure of a KB article is very similar to that of a ticket. There are, however, some differences that will be explained in the following.

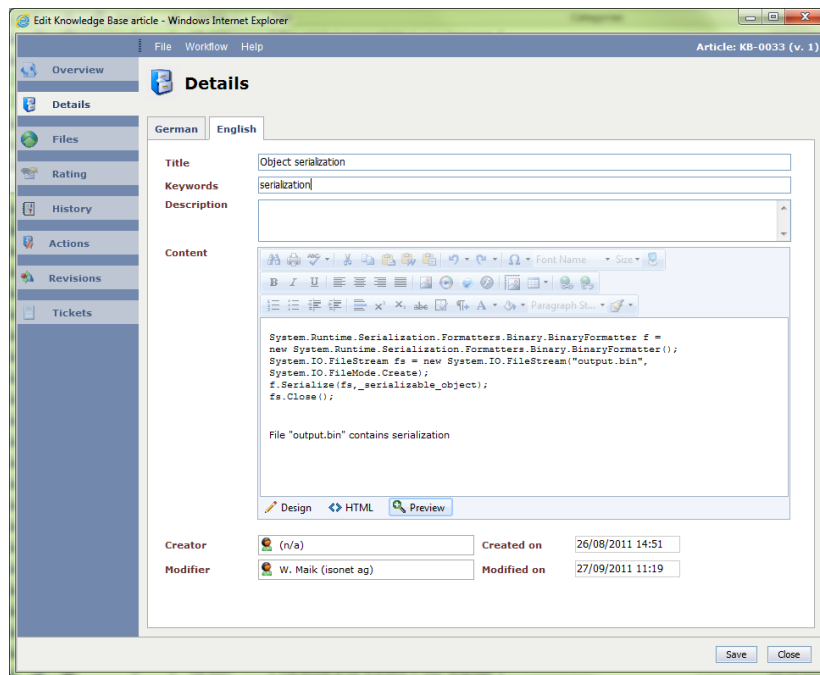


Figure 2.1: The detail view of a knowledge base article

2.1 Tabs

A KB article is structured similarly to a ticket providing several tabs on the left side.

2.1.1 Overview

In this overview, several details can be seen, like the identity displaying the internal naming of the article (e.g. KB-0011) and the template the article has been created from, for example.

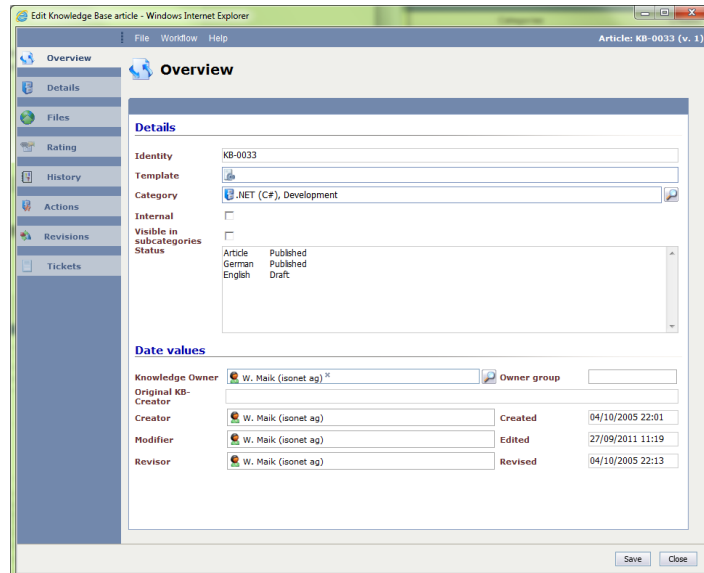


Figure 2.2: The overview of a KB article

The following information is displayed under Details:

Please note

If values are to be changed in an article, the user to change them has to have the necessary rights. You can find further information on user permissions in the *User Management* document.

Identity: Contains the article number of the KB article. It is composed similarly to a ticket number and used for identifying the article. Using this number in the direct access the KB article can be opened directly.

Template: Displays the article template used for creating the article.

Category: Contains the categories the article can be found in to guarantee an easy-to-handle organization.

Internal: KB articles can be divided into internal and public articles. If this option has been activated, the current article will be marked as internal.

Visible in subcategories: The article will be displayed in the subcategories of the selected category/categories as well. If this option is not activated, the article will only appear in the categories it has been explicitly linked to.

Status: Contains the status of the entire article and of the individual languages. It is possible that, for example, a German article has already been published and is thus visible and usable for all users. The English part of the article, however, still needs to be revised once again or it has not been finished yet.

In the lower section under Date values information, like the knowledge owner and the owner group, is displayed:

Knowledge owner: The knowledge owner denotes the person or the user managing the article or the knowledge of the article. The knowledge owner can be changed by clicking

into the field and entering the user name. If the knowledge owner is unknown, the user browser (magnifying glass icon) can be used instead.

Owner group: Denotes the user group of the knowledge owner.

Original KB creator: Contains the creator of the KB article.

Created: Usually contains the original creator of the KB article. If, however, an article revision or version has been created by another user in the meantime, this creator will be displayed along with the creation date of the new article revision or version.

Edited: Contains the date of the last change of the article as well as the user that changed the article.

Revised: Contains the user who revised the article the last time and the date of the revision.

2.1.2 Details

On the Details tab the actual KB article is displayed. If the current user has the necessary authorization, the title, key words and content can be edited.

Title: Contains the title of the KB article.

Keywords: Key words ease the access of an article by using the full text search. The key words can be entered divided by a comma.

Content: Contains the content of the KB article which can be edited by a WYSIWYG editor that provides selection options for font, font size and other formatting options. For a user not having sufficient permissions to edit an article the article is displayed without the editor.

The figure shows two screenshots of a web interface for editing a knowledge base article. Both screenshots have tabs for 'German' and 'English'. The top screenshot is the 'Editable' view, featuring input fields for 'Title' (containing 'Sample article'), 'Keywords', and 'Description' (containing 'This is a sample kb-article'). The 'Content' field is a rich text editor with a toolbar and contains a block of Lorem Ipsum text. The bottom screenshot is the 'Viewable' view, showing the same fields but with the 'Content' field displaying the Lorem Ipsum text as plain text without the editor interface.

Figure 2.3: The two different views: Editable (above) and viewable (below)

If several languages are available for the *Xpert.NET* installation, the KB articles can be composed in these languages as well. In order to change the language, use the language tabs above the article.



Figure 2.4: Simply click on the designated tab in order to display the article in this language

2.1.3 File Attachments

On the Files tab files like screenshots, text files or Excel sheets can be attached to a knowledge base article in order to enhance their comprehensibility visually. A new file is attached by selecting the button *New file* or the actions menu where existing files can also be deleted. Select the attachment with a mouse click and select *Remove attachment*.

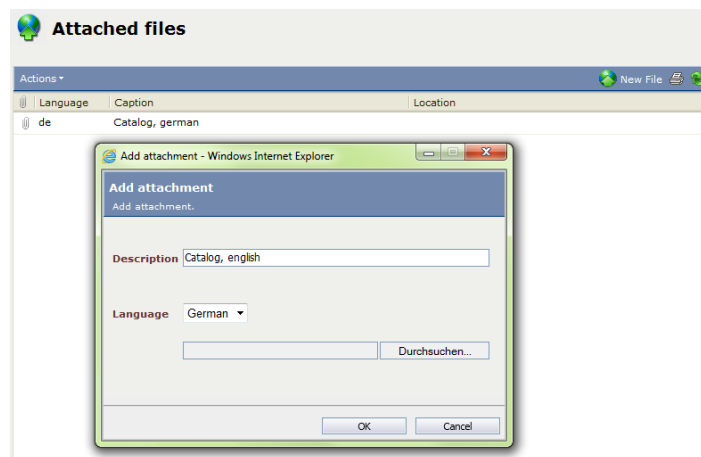


Figure 2.5: The File tab with an opened window for adding a new file

2.1.4 Rating

The Rating allows the users to rate the article (by assigning one to five points) and by entering a comment, which allows for an easy assessment of the effectiveness of the presented solution or for making suggestions for improvement.

2.1.5 History

This tab contains all changes on the article for a better comprehensibility.

2.1.6 Actions

This tab contains all workflow actions to be performed by the current user. These actions are displayed in the activity list as well.

To configure KB article actions the workflow designer is necessary (see *Workflow Management* documentation).

2.1.7 Revisions

Revisions allow for managing the versions of an article. A revision can be created in one of the available languages. If all necessary information has been provided, the revision can be published. The outdated article version will be archived automatically and the new version will be published with a new article version number (the current version number can be seen top right on the article frame).

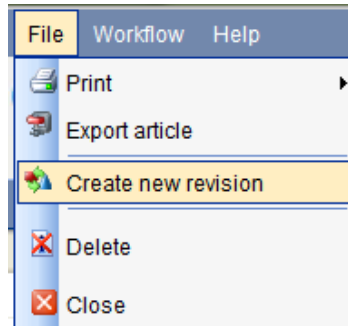


Figure 2.6: Just click the menu item Create new revision in the top menu under File in order to create a new revision

If revisions are active and a ticket has been linked to a particular article revision, this revision is always displayed in the ticket, even when a new revision of the article has been created in the meantime.



Figure 2.7: You can see the currently selected revision of an article in the upper right corner of the article window. In the background, you can see the old article and in the foreground the revision created from it

2.1.8 Tickets

This tab contains all tickets linked to this article displayed in an overview. The tickets can be opened by double click.

The display of tickets depends on the version of the opened article. If an article is directly opened from the knowledge base, the latest published version of the article will be displayed.

When an article is opened from a ticket, the article version published at the time the link has been created will be opened. This tab only shows the ticket links created until this point. Links of later versions will not be displayed.

2.2 The Functions of the Top Menu

In the top menu of every article there are further features for article management.

2.2.1 File

The menu item File provides the options *Print*, *Export article*, *Create new revision*, *Delete* and *Close*.

Print: This option compiles a page that contains an overview and the details to the article in the respective selected language. It can either be printed immediately or converted into several different formats to be saved as a file.

Export article: This option creates a ZIP file containing the current article content. After this, the file download will start automatically. The ZIP file contains information on the current article, the content of the article as an HTML file and file attachments in an additional sub folder. Embedded Flash and WMV Objects will be exported as well.

Create new revision: Clicking this button allows for creating new revisions of the current article (see also Sections 2.1.7 and 3.2).

Delete: Deletes the selected article.

Close: Closes the article.

2.2.2 Workflow

The menu item Workflow offers the pending actions for the current KB article, like Archive, Revise or Direct publishing. Please find further information on these actions in chapter 4 of this document.

3 Creating, Deleting and Exporting Articles

There are three options for creating a new knowledge base article: Creating a new article directly in the knowledge base, creating a revision of an already existing article or generating an article from a ticket.

3.1 Manually Creating an Article

A new article can be created by clicking on the *Knowledge Management* button at the bottom of the display and then clicking on the *New article* button in the top right corner of the display on the next page.

A wizard is opened to select the desired template. Another dialog is opened for further settings. By selecting the *Save* button the article can be saved. If the dialog is closed before saving, all changes will be rejected and an article will not be created.

3.2 Creating an Article from a Revision

A revision of an article is created by opening an existing article and selecting the option *Create new revision* in the *File* menu. A dialog is opened for editing the article, which is effected similarly to creating or editing an article.

The created revision of an article will be saved as a draft and can be accessed through the *Revisions* tab. The draft can then be published or revised similarly to a KB-article.

If a new revision of an article is published, all previous revisions will be archived, but only, if these revisions have also been published. Unpublished revisions will be not archived and keep their current status.

The creation of a new revision is logged in the original article the revision has been created from and in the history of the new revision.

3.3 Generating an Article from a Ticket

It is furthermore possible to generate a KB article from existing tickets, which allows for providing a ticket solution for other users.

In order to generate a KB article from a ticket, the ticket has to contain a solution. Open the ticket and select the item *Create KB article from ticket* from the *Actions* menu.

Please note

The ticket action *Create KB article from ticket* has to be configured before being used. If the menu item does not appear, you have to make sure that the ticket action has been activated in the respective status for the proper group of the user that is supposed to execute the action, and that a working mapping has been created. You can find further information in the *Ticket Management* documentation.)

3.4 Deleting an Article

If there is no further use for an article, it can be deleted beyond doubt directly from the article list by selecting the article and by clicking *Delete* in the *Actions* menu. The second option is to open the article and to select the *Delete* option in the top menu under *File*.

There are several options for deleting only a certain revision of an article. For this purpose, the option *Include revisions* can be activated under *Search*.

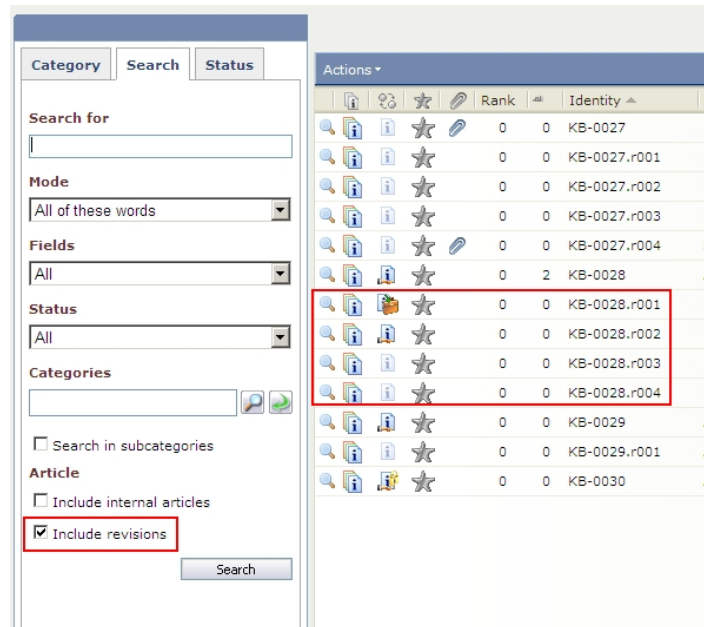


Figure 3.1: Next to the articles, the different revisions of the articles will be displayed as well

The revisions of an article will be displayed on the article list as well. It is now possible to delete the respective revision similarly to a normal article directly via the *Actions* menu or by opening them and using the *Delete* option in the *File* menu.

An article can also be opened by switching to the *Revisions* tab and by opening the desired revision by double clicking on it. The article can then be deleted by using the respective option in the top menu.

All the other revisions of the article are not affected. Deleting the article, however, will include all revisions.

Links to articles in tickets will be removed upon deletion. If a particular revision is deleted, all links to it in a ticket will be removed as well. If the whole article is deleted, all links to it and its revisions will be removed.

3.5 Exporting an Article

An article can be exported in two different ways:

- Exporting individual articles as described in Section 3.2.1 or
- Exporting an entire article category.

In order to export an entire article category, simply right click on the desired category and select *Export category*. The following dialog allows for selecting the status and the subcategories to be exported. It is possible to export attachments and internal articles as well. The name for the downloadable file can be entered as well. If all specifications have been completed, click on *Save* and a Zip file containing all of the designated articles will be created. The download will start automatically after creation.

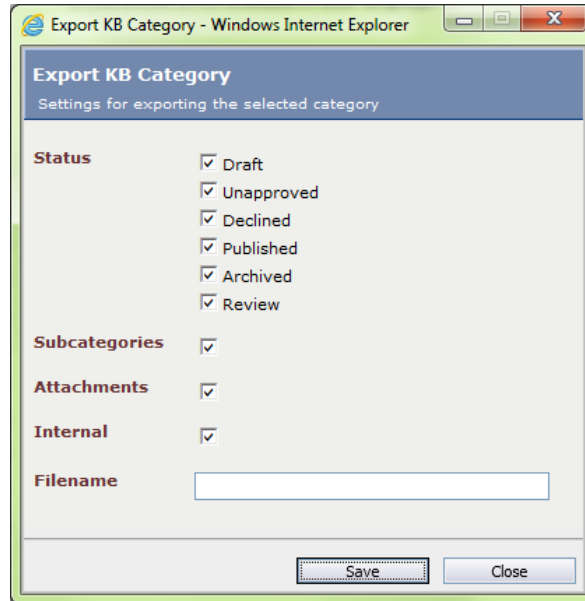


Figure 3.2: The available options for the export of entire KB categories

4 Article Actions

Depending on the current article status, several workflow actions are available.

If article actions like *Revise* or *Publish* are pending for the current logged in user, these actions are displayed in the activity list of this user.

4.1 Publishing Articles

An article created by a user can either be published immediately or be submitted for checking.

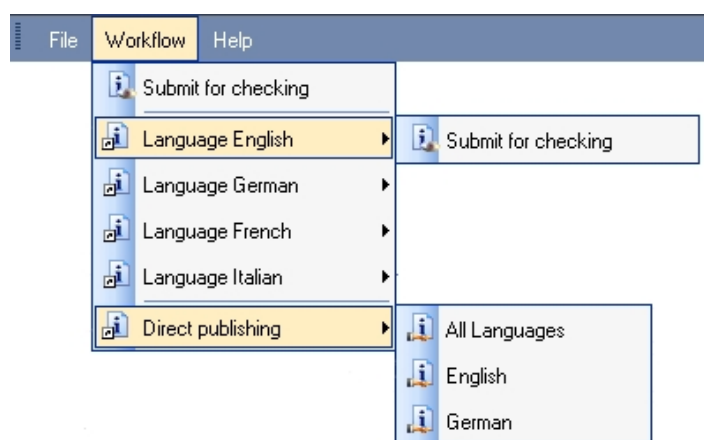


Figure 4.1: These workflow actions are available as soon as a new article has been created.

It is useful to publish the article directly if its content shall be available as soon as possible or if separate checking is not necessary. Publishing an article directly can be effected by selecting the menu item *Direct publishing* under *Workflow*. Furthermore, it is possible to define whether the article shall be published in all languages or just in a specific language. After the article is published, it is viewable and usable for all uses with permission to the KB in the respective article category.

Hint

Whether an article can be published directly depends on the user's rights!

The checking of the article has to be done for every available language separately and subsequently for the article as a whole. This, however, only applies to systems with more than one language activated. If only one language has been activated on the system, it is only possible to submit the article for checking.

After publishing the article the following actions are available:

Archive: The current article will be archived. Archiving is available for every single language as well. After the article has been archived, only the action *Revise* is available for it. Archived articles can be seen as an option for filing not up-to-date information, which may be used again later on.

Revise: The entire article is marked for revision.

Warning

If, however, the article is submitted for checking, it has to be checked by a second user and, if necessary, revised before it can be published. During this period, the article will not be available to other users.

4.2 Checking Articles

If the article has not been published directly, it has to be checked first. When the check has been finished, the following workflow actions will be available:

Decline: The article will be declined, gets the status Draft, and thus has to be revised again.

Publish Internal: The article will only be available to special user groups that have been unlocked in the User Management specifically for this purpose (authorization).

Publish: The article will be available for all users that can access the knowledge base in all languages. The status of the entire article will be set to Published.

Publish in a certain language: This workflow action is generally similar to the action *Publish*. The article, however, will only be available in the knowledge base in a certain language. It will remain in the previous status for the other languages.

4.3 Revising Articles

If an article is marked for revision, it has to be revised by a second person. For the user to revise the article, it will be displayed with the editor again and thus can be changed, as opposed to a user that can only read the article. As soon as the revision is completed, it has to be submitted for checking again.

In order to use this automatic feature, a certain agent module has to be installed. It checks, when an article is to be resubmitted for revision. When this date arrives, the status of the article will be changed to Draft, so that normal users cannot access the article any more until the revision will be completed. Such a setting can be used for articles, which are often subject to changes, for example.

Please note

If the agent module has not been started or installed, this feature can be used anyway. However, articles have to be marked for revision manually in this case.

If the article has been marked for revision, the following actions are available in the menu item *Workflow*:

Submit for checking: Forwards the revised article to a specified person or group for rechecking.

Publish directly: Allows for publishing the article immediately without rechecking the content.

4.4 Workflow Actions

As an administrator it is possible to configure certain workflow actions that will be executed whenever an article reaches a certain status. A workflow can be created by using the Workflow Designer. The workflow needs the type *KB Workflow*.

As soon as this workflow is initiated by a status change, the user actions configured in the workflow will be displayed on the *Actions* tab in the KB article. These actions will be displayed in the activities list of the users for execution. An action is opened by a double click.

5 The Search

There are several search options for finding articles quickly: Using filters, categories, the full text search or the display of articles according to status. Additionally, knowledge base articles can be searched via the extended search, which can be accessed in the top menu under TOOLS -> EXTENDED SEARCH. Details on these search options can be found in the *Search and Filter* documentation.

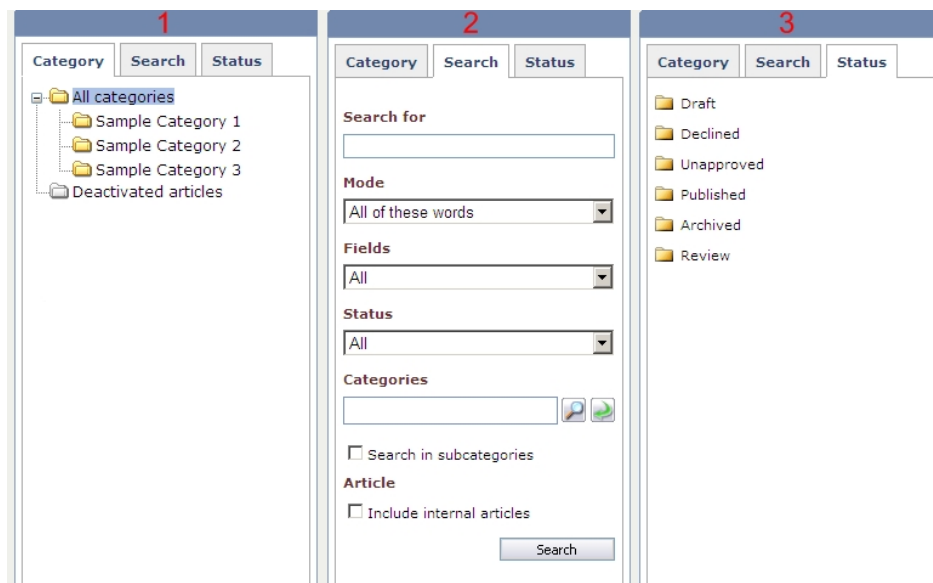


Figure 5.1: An overview of the search options in the knowledge base: Category (1), Search (2) and Status (3)...



Figure 5.2: ...and the three predefined filters

6 Managing the Knowledge Base

The setting options for the knowledge base can be found under **SETTINGS -> KNOWLEDGE MANAGEMENT**.

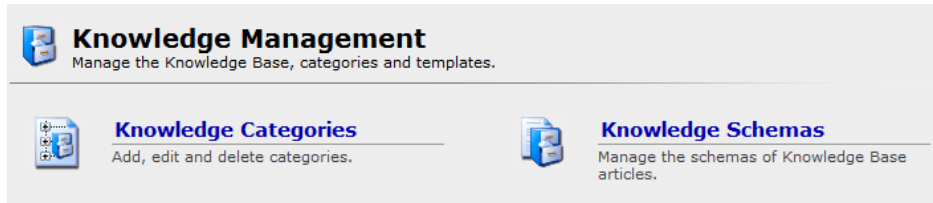


Figure 6.1: The Knowledge Management

6.1 Knowledge Categories

This menu allows for creating new categories and subcategories by selecting the *Insert* button. Furthermore, existing categories can be edited by selecting the *Edit* button (e.g. to change the name and description). Additionally, categories can be activated and deactivated by selecting the *Activate/deactivate* button.

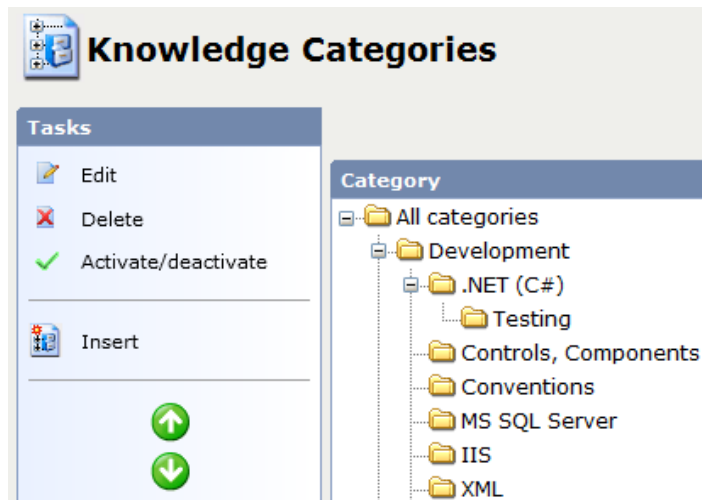


Figure 6.2

The green arrows in the *Tasks* menu allow for moving categories upwards or downwards in the hierarchy and within a category as well.

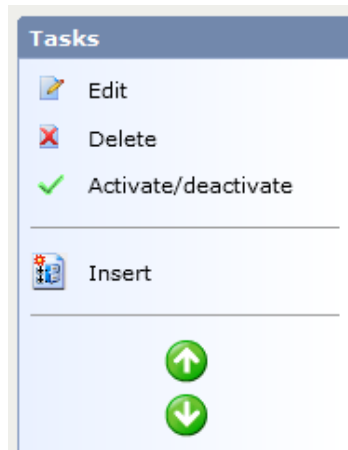


Figure 6.3: The Tasks menu with its functions

6.1.1 Deactivating a Category

A selected category can be deactivated by clicking on *Activate/Deactivate*.

For inactive categories please note the following facts:

- An inactive category will be displayed to all users having the right to manage the knowledge base. If such a category is selected in the knowledge base in order to view an article, only the articles contained are inactive and at least one active category will be displayed.
- Under the node *Deactivated Articles* all articles contained in the inactive category will be listed.
- A category can only be deleted if it does not contain any articles, which means that all articles have to be deleted in order delete the category afterwards.

6.2 Knowledge Schemas

The menu *Knowledge Schemas* allows for creating, editing and deleting knowledge schemas.

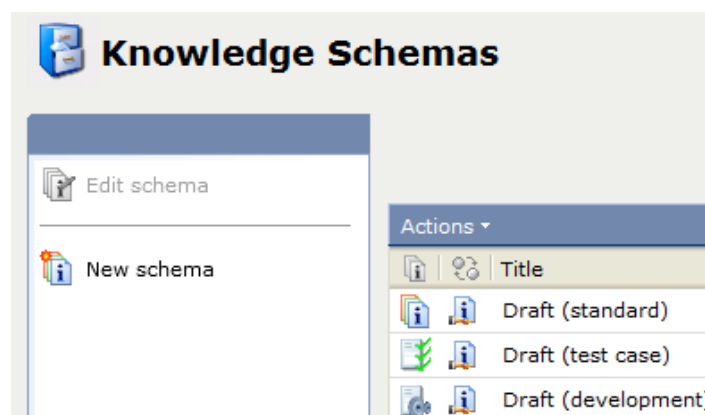


Figure 6.4: The options for creating or editing a schema can be found in the sidebar

If a schema is opened or a new one is created, the following options are available on the *Common* tab:

Title and Description: Contain the name and description of the schema. Both have to be specified in all of the languages activated on the system.

Icon: Contains a distinct icon that can be chosen for the selected schema for identifying articles that have been generated with this schema.

Status: Defines the initial status all of the articles created with this schema. If the status *Deactivated* has been selected, no articles can be created with this schema.

Validity

The *Validity* tab allows for defining whether articles that have been created with this schema shall only be valid for a certain time period. After this period has been expired, the article will automatically be set to the status *Archived*.

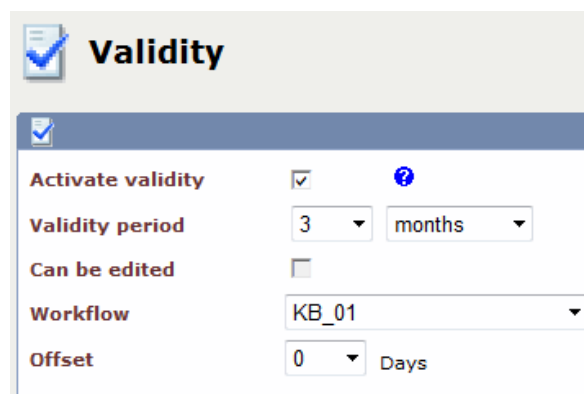
The image shows a software interface for configuring the 'Validity' of a schema. The title 'Validity' is displayed in a large, bold font at the top left. Below the title, there are several configuration options: 'Activate validity' with a checked checkbox and a help icon; 'Validity period' with a dropdown menu set to '3' and another dropdown menu set to 'months'; 'Can be edited' with an unchecked checkbox; 'Workflow' with a dropdown menu set to 'KB_01'; and 'Offset' with a dropdown menu set to '0' and the unit 'Days'.

Figure 6.5

Activate validity: This option allows for determining whether articles of the selected schema will be subject to validity. At the end of the validity, a workflow can be initiated to execute a certain predefined action, for example.

Validity period: Defines the validity period of the article.

Can be edited: If this option has been activated, the validity of an article can be edited even after its creation. The start and end date can be reset.

Workflow: Defines the workflow to be initiated at the end of the validity.

Review

On the *Review* tab the settings for an automatic resubmission of articles can be customized. After the configured period the article will be removed from the status *Published* and submitted for a review to a predefined number of users.

Activate resubmission: Defines whether the resubmission shall be activated.

Resubmission in: Defines the time period the article shall be resubmitted automatically after.

Starting with status: Defines the status the resubmission shall be performed for. If this status has not yet been reached in an article, it will not be submitted for a review either. It does, for example, not make any sense to mark an article having the status *Draft* for a review automatically as it has not been finished yet.

Workflow: Contains the workflow to be initiated at the same time as the resubmission.

Status transition

The fourth tab, *Status transition*, allows for a definition of your own status transitions from status to status. In the overview all defined status transitions are displayed. A new status transition can be added by clicking on *Add status transition*.

A dialog is opened to define the following four options:

Old status: Contains the desired initial status.

Warning

You are advised to use the status *No status* when you want a workflow to be triggered for a KB article after creation. This status only allows for switching to the *Draft* status. The selected workflow is the initial workflow of the article.

New status: Defines the desired target status.

Workflow: Defines the workflow to be initiated on status changes.

Type: Defines whether articles, revisions or both can perform this status transition.


7 Statistics and Change Management

7.1 Statistics

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Document name	Knowledge Management 3.8-2_EN

7.2 Change Control

Version	Date	Executed by	Comments
3.0	07.01.2011	Maik Wisatzke/- Marco Mehl	Complete revision/advices for inactive categories added
3.1	09.09.2011	Marco Mehl/Maik Wisatzke	Remark on the display of tickets on the Tickets tab; general revision; revised search
3.2	08.08.2012	Maik Wisatzke/St- effi Kurnot	Startworkflow added, linguistic revision
3.8-1	24.01.2013	Maik Wisatzke	Changes for Xpert.NET 3.8.x
3.8-2	26.04.2013	Maik Wisatzke	Sub-headlines for knowledge schemas added
3.8-3	23.01.2014	Maik Wisatzke	New design adapted, new figures



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