REQUEST TRACKER 4
“ARTICLES” KNOWLEDGE BASE

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AGENDA

- Features
- Structure and setup
- Demo
- Possible uses (short term)
- Long term knowledge management
- Planned RT4 “Article” work
- Timeline
- Questions
FEATURES

- Include article text in ticket replies
- Create articles from tickets
- Link articles to other articles/tickets
- Insert multiple files or images into articles
- Search articles
- Flexibility in configuration:
  - Custom fields
  - Can have IT section available to all IT staff (and Dept./area sections only available to depts./areas)
  - Can move articles into other sections (e.g. make available to all)
STRUCTURE

• “Classes” of articles (examples):
  » ‘CampusIT-internal’ (open to all campus IT staff)
  » ‘Public’ (open to everyone with WatIAM credentials)
  » Department/area specific (permissions defined by area)

• Topics list within the classes:
  » CampusIT-internal and Public
    • IT service related topics
    • As services are better defined, these topics can be updated
  » IT Departments/areas
    • IT service related topics
    • Additional topics if needed
  » Other departments/areas
    • Custom topics
STRUCTURE/SET UP

• Custom Fields
  » Additional fields can be added for all articles in a ‘Class’
  » Default fields can be used initially

• Queues and article ‘Class’es
  » Can link specific queues to specific article classes
    • Useful for replying to tickets, or creating articles from tickets
  » The CampusIT-internal and Public articles will be linked to all IT queues
  » Queue owners can have input on how this is set up for their queue
DEMO

- Create articles from scratch
  - Insert multiple files or images into articles
  - Custom fields
- Create article from a ticket
- Include article text in ticket replies
- Link articles to other articles/tickets
- Search ‘Articles’
  - Saving searches
  - Sharing searches
  - Loading a saved search
- Move articles into other sections (e.g. make available to all)
- Articles/Overview
POSSIBLE USES - SHORT TERM

• Service desks (help desks)
  » Track answers to FAQs to quickly reply to tickets
  » Track troubleshooting information that can be quickly searched and referenced
    • Links to existing web pages/documentation
    • Ad hoc solutions

• Known Error Database
  » Can have a Class of Articles for known errors that can be referred to by support/technical staff

• Internal department/group
  » Knowledge sharing
    • Formal
    • Ad hoc
LONG TERM KNOWLEDGE MANAGEMENT

• IT Best Practices will be making a recommendation around Knowledge Management (early fall 2014)
PLANNED RT4 “ARTICLE” WORK

• Permissions
• Searching
  » Improvements
  » Documentation
• Date and Author fields
  » Auto populate
  » Display them on main article screen
• Move Topics to top of Article Creation screen
• On screen help (where possible)
• Order of fields on Article creation screen
TIMELINE

• November/December: Articles to be available (after October RT4 go live)
QUESTIONS?

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• Also: http://uwaterloo.ca/rt

• Thank you! 😊