REQUEST TRACKER 4 "ARTICLES" KNOWLEDGE BASE

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AGENDA

- Features
- Structure and setup
- Demo
- Possible uses (short term)
- Long term knowledge management
- Planed 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

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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)

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QUESTIONS?

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- Also: http://uwaterloo.ca/rt

- Thank you! ☺