

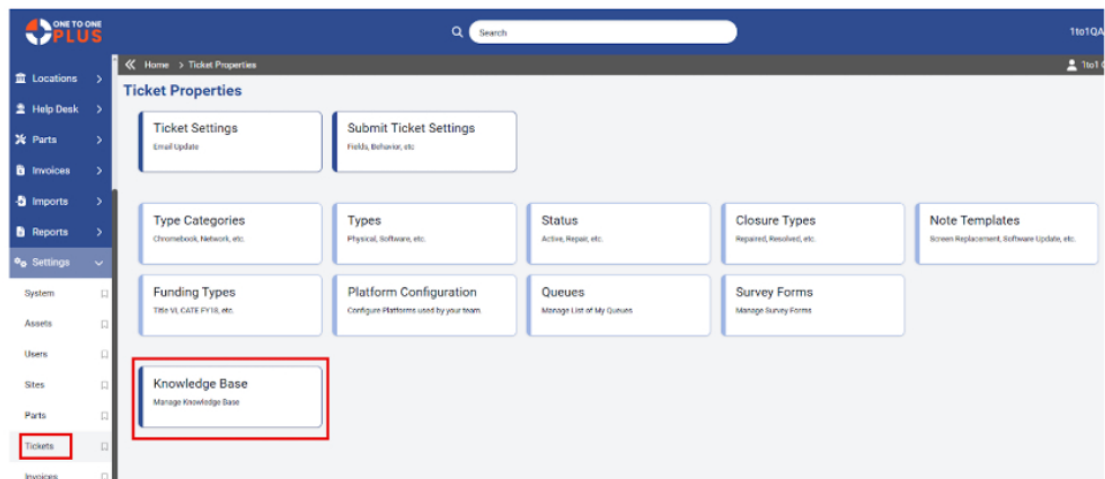
Setup and Process the Knowledge Base



1 Setup

Setup

- **Knowledge Base** - To use this feature, a KB form must be set up. You can create or manage forms by navigating to **Settings > Tickets > Knowledge Base**. You must be an Admin to create and manage KB and specific groups can have access to articles.



2 Adding/Editing KB article form

The screenshot shows a form for adding or editing a KB article. The form is divided into several sections: General, Article Name, Description, Keywords, User Groups, and Body. The Article Name field contains 'Printer Troubleshooting'. The Description field contains 'Things to try for printer problems'. The Keywords field contains 'Printer', 'Printer with no error message', 'Revolviner', 'Print', and 'Jam'. The User Groups field is empty. The Body field contains a rich text editor with the text 'Printer Troubleshooting Guide' and 'Overview'. Below the Body field, there is a section titled 'Step 1: Check Printer'.

Article Name can be a generic name of the type of KB form. **Description** allows for detailed explanation of the article. It will not appear on the ticket screens.

Keywords are the searchable words that can be used to display the article. There is no limit of how many you can create. Each keyword has a 256 character limit.

User Groups can be used to control who can have access to the article. The **Body** is used to store the details of the article or to provide external links to resources that the user can access. The body can contain images as well as details.

3 Add KB article to ticket type

Ticket Types - After KB articles are created, they will need to be linked to ticket types. Multiple articles can be linked to one ticket type.

The screenshot shows the 'Edit Ticket Type' form. The form is divided into two main sections: Ticket Type and Knowledge Base. The Ticket Type section contains fields for Ticket Type, Description, Billable Amount, Task Type Category, Email Group, Default Technician, Default?, Submit Ticket?, and Turn In?. The Knowledge Base section contains a list of linked articles: KB-4 Printer Troubleshooting, KB-5 Printers, and KB-7 Clear Cache. The Knowledge Base section is highlighted with a red box.

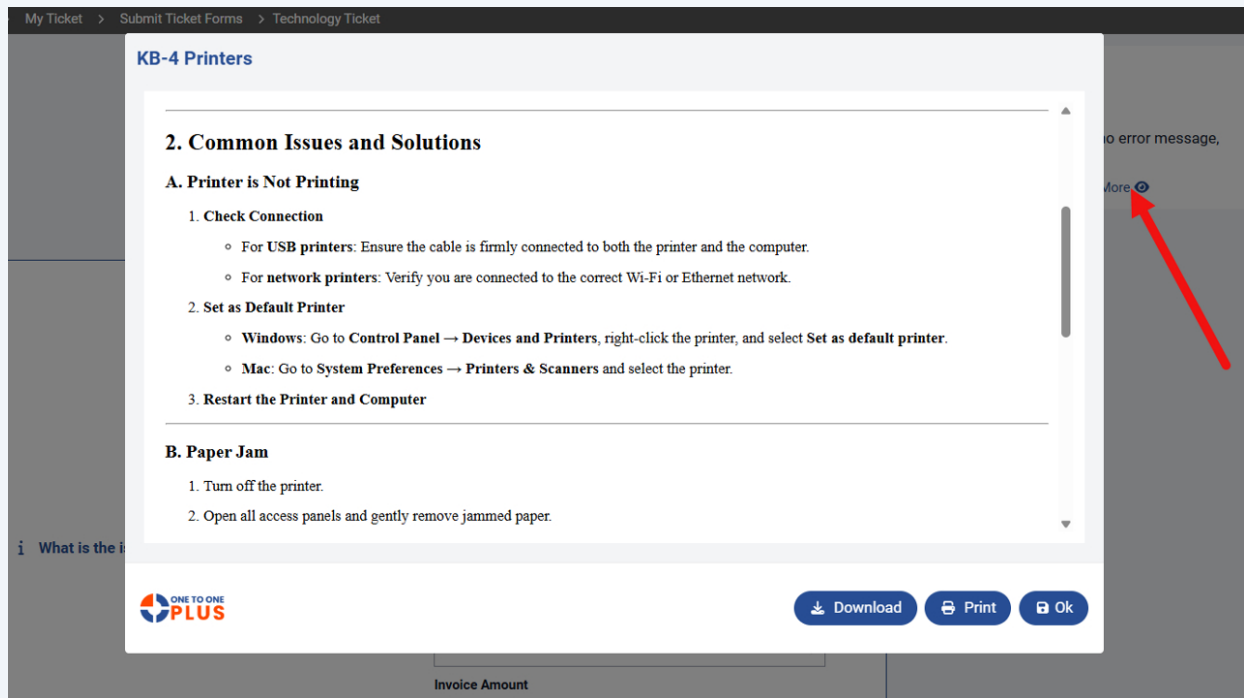
4 Process Steps

Submit Ticket, Add Ticket, Edit Ticket - When a ticket type is selected that is linked to a KB article, it will display on the right side of the ticket form.

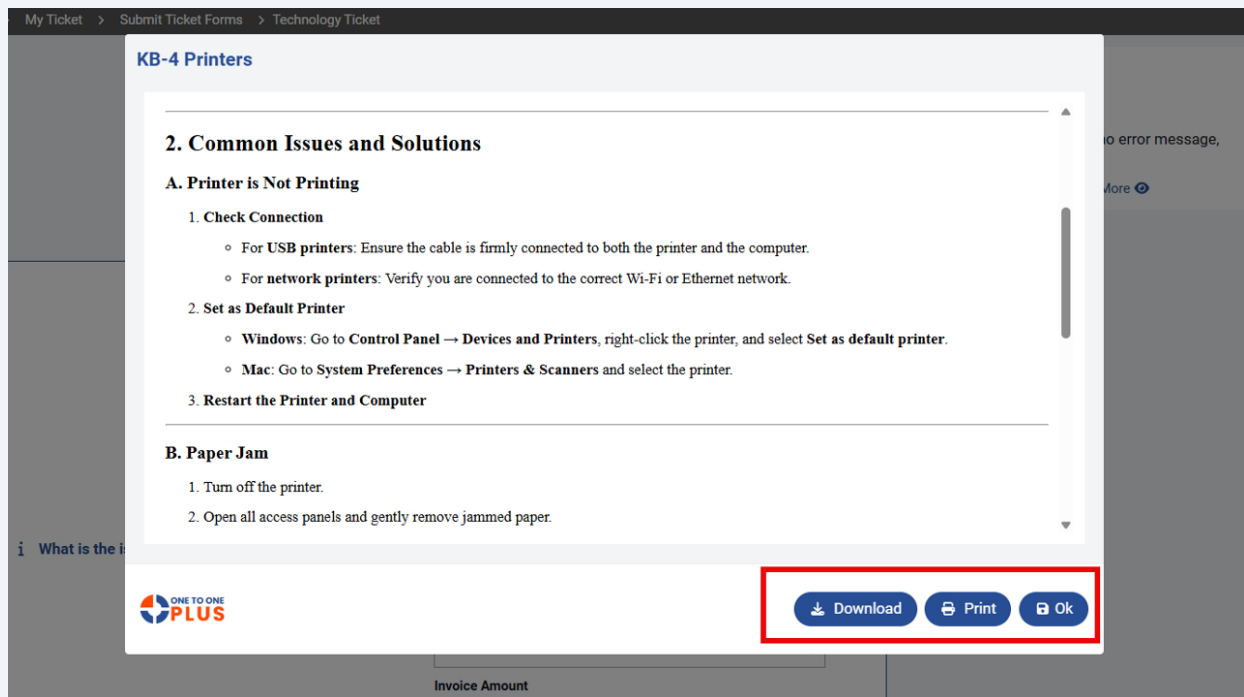
The screenshot shows the 'Submit Ticket' interface. The main form area has a header 'Submit Ticket' and a sub-header 'Submit a student ticket'. Below this, there's a section 'Select Student of who will be affected by this issue.' with a text box. To the right of this section are dropdown menus for 'Related User' (selected: Karen Zuber), 'Related Asset', and 'Collaborators'. Below these is a 'Ticket Types' dropdown menu, which is highlighted with a red box and shows 'X Printer' selected. To the right of the main form is a 'Knowledge Base' sidebar, also highlighted with a red box, listing articles: 'KB-4 Printer Troubleshooting', 'KB-5 Printers', and 'KB-7 Clear Cache'. On the far right is a 'New Student' sidebar showing a list of tickets with details like ID, description, status, and creation date.

The user can then click on the “view more” option to see the details and they can be downloaded or printed.

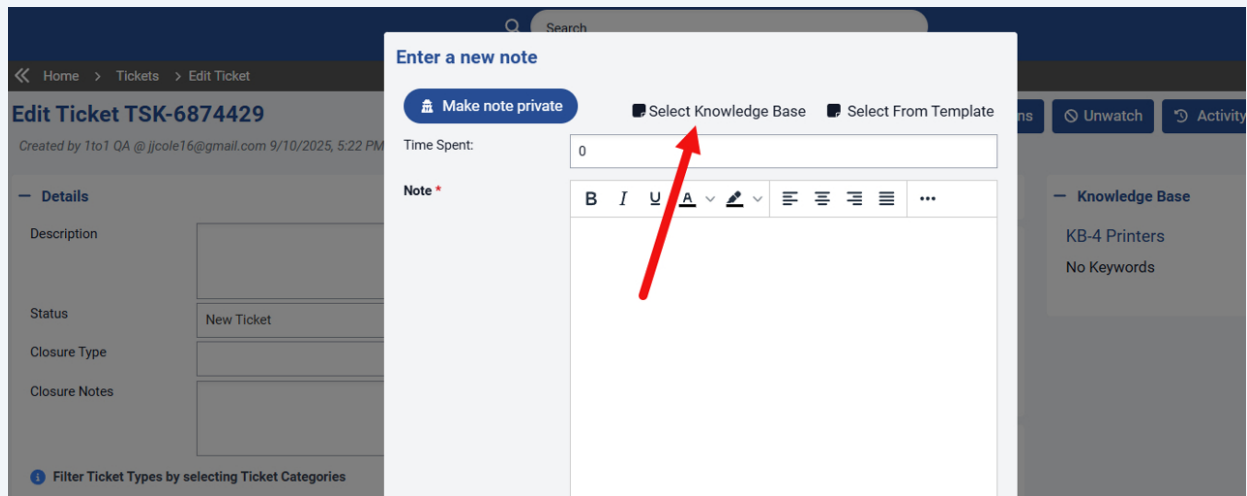
5 When the "view more" link is clicked the article will display



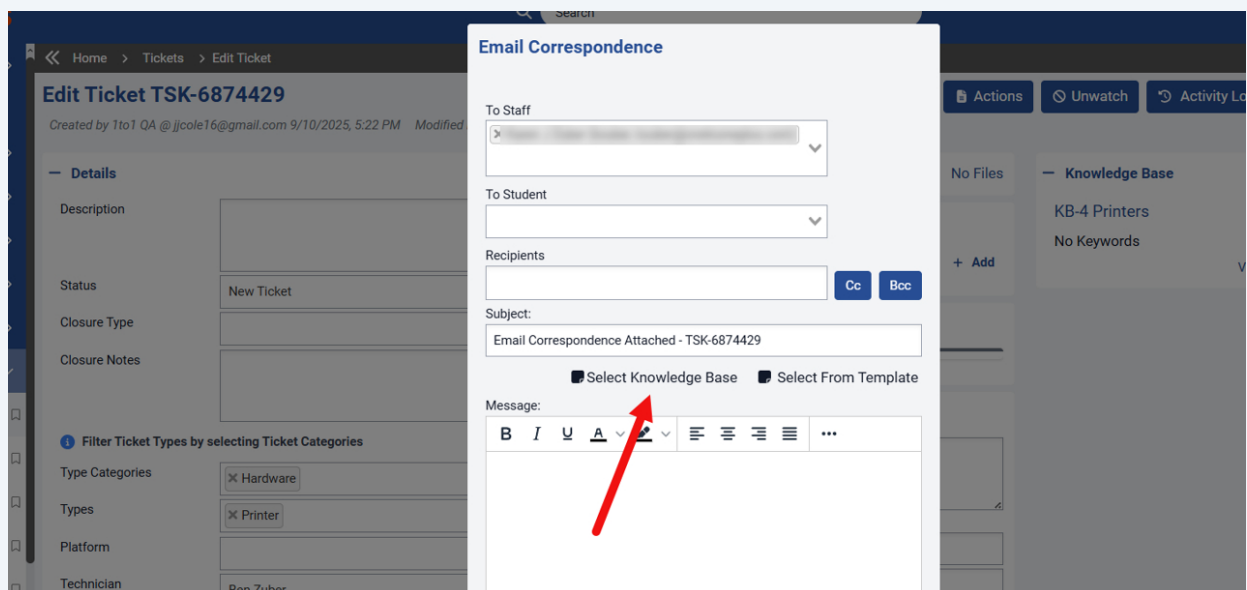
6 The article can be downloaded or printed from here



7 KB articles can also be attached to Notes on Edit Tickets



8 KB articles can also be attached to Correspondence on Edit Tickets



9

KB articles can be searched for in the "Global Search" field

