Standard Operating Procedure

Managing the Knowledge Base

Center of Excellence

Version 1.0

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1 Introduction

This document describes the tasks needed in managing the Knowledge Base in Global IT Service Desk (GITSD).

Audience

- Knowledge Managers
- System Administrators

2 Process

Dependencies

Roles and Responsibilities

Activity Responsibility	Owner
Tool Management	GITSD System Administrators
Submit Knowledge Documents	Employees, Analysts, and Knowledge Engineers
Publish Knowledge Documents	Knowledge Managers
Review Knowledge Documents	Knowledge Engineers
Edit Knowledge Documents	Knowledge Engineers and Knowledge Managers

Related Documents

- Adding a Knowledge Document.
- Creating a Knowledge Document from a Ticket.

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- Creating Knowledge Base Usage Reports.

3 Procedures

Daily Tasks

To perform your daily task, do the following:

1. Check your "ABC" email for any notifications regarding the new documents submitted.

2. Log on to GITSD.

3. Click the **Knowledge Documents** node.

4. Check the documents in each sub-node, if any.

5. Perform the tasks as follows:

   a. Inbox –Documents assigned specifically to you go into this sub-node. For more information, refer to Publishing a Knowledge Document.

   b. Group Inbox – Documents assigned to your group go into this sub-node. For more information, refer to Publishing a Knowledge Document.

   c. Unassigned – Documents created by GITSD users that are neither Analysts nor Knowledge Engineers go into this sub-node.

      i. Check with the author whether the document was created as per requirements.

      ii. If the document was created to be added to the Knowledge Base, determine the correct category and reviewer and refer to Publishing a Knowledge Document. If not, delete the document.

   d. Non-indexed – Documents created by Knowledge Engineers go into this sub-node.

      i. Check with the author whether the document was created as per requirements.

      ii. If the document was created to be added to the Knowledge Base, assign the appropriate category and refer to Publishing a Knowledge Document. If not, delete the document.

Publishing a Knowledge Document

1. Open the document and check whether the new document is a duplicate of any existing document. If so, contact the document owners to resolve the issue accordingly:

   a. The new document is a duplicate of an existing published document and therefore is not published. Re-indexing the existing published document might be required to make it more visible during a search.
   b. The new document replaces the previous document because it is up to date. In this scenario, retire the previous document.
   c. The new document contains useful information not present in the existing published document. The two documents need to be merged and re-indexed so that the search for the new information brings up the document.
   d. Duplicate documents are kept as separate documents because a closer review determines that the documents actually represent different scenarios. In this case, the titles, summaries, resolution fields, and the indexing keywords must be updated to reflect the content of the documents.

2. Click **Edit**.

3. Go to the **Attributes** tab.

4. Enter information in the following fields:

   a. Owner: Check the Knowledge Groups list to determine the document owner.

   b. Review/Expiration Date:

   - Knowledge Documents – One year from creation date.
   - Known Errors in GITSD – Six months from creation date.

5. Check that the correct Approval Process Template is assigned. For documents found in the unassigned sub-node, select and assign the appropriate template.

   Note: If a new template is necessary, raise a request in GITSD to have a new template created.

6. Go to the **Categories** tab.
   Check if the document is added to the correct category.

7. Click **Forward**.

8. Select the reviewer from the list and click **OK**.

9. When the document has been reviewed, open the document and check for grammar and content.

10. Click **Edit**.

11. Click **Publish**.

Managing the Review Cycle

1. Check your "ABC" email for any of the following notifications and perform the necessary task accordingly:

Notification	Action
Document review	Forward the document to the owner/reviewer.
Document about to expire	Send an email to the document owner regarding the status.
Document expired	Send an email notification to the owner that the document has expired.
User comment	Comments are also forwarded to the document owner. If necessary, try and follow-up with the document creator.
Document Published	None
Document Unpublished	None
Document Assignment	If it is assigned to KM then review and forward.
KD approval process task for document was completed	Refer to Publishing a Knowledge Document.
Document rejected in approval	Reroute document to the author and repeat the review cycle.
Document republished	No action needed. Re-publishing is necessary.
Document status changed	Publish
Knowledge submitted	Forward the document to the owner/reviewer.

2. Follow up on the status of documents that are about to expire or are in review and escalate when necessary.

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Removing a Knowledge Document from the Published Documents List

1. Log into GITSD.

2. Go to the **Knowledge** tab and locate the document to be unpublished.

3. Open the document.

4. Click **Edit**.

5. Click **Unpublish**.

DOCUMENT CHANGE HISTORY

Version #	Date	Author	Brief Description of the Change
1.0			