Knowledge Management Article User Manual

The purpose of this document is to create the user manual for the knowledge management portal application. This manual is intended to help first-time users through the login process and provide an overview of the basic features for an authorized user. The user manual represents the interaction of a user with the application and his expectations.

1. URL

http://ec2-18-144-75-92.us-west-1.compute.amazonaws.com:8088

2. Login Page:

User has to login using his/her username and password to access the knowledge management portal. User selects username from the dropdown menu. Users are defined as Author, Viewer and Approver. Author have the permission to create, update and submit his/her article to the Approver. Approver reviews and updates the knowledge article which has been submitted for approval and publishes it to the knowledge management portal for all to view and peruse. Viewer can search the knowledge management portal by using search criteria so that he/she can read the article to gain knowledge.



How to Login In

1. Select User Name from the dropdown menu and provide password. Users are defined as Author, Viewer and Approver. Different users are assigned with different permissions or roles.

[Note: Article Viewer: Search and view articles

Article Author: Article Viewer permissions + Create new article, update draft articles **Article Approver/Publisher**: Article Author permissions + Approve/Publish articles]

	User Name	Password
1	author Kim	Password1
2	approver Ben	Password1
3	viewer John	Password1

- 2. Click on the Login button.
- 3. Upon logging in, User reaches to the landing page.

3. Landing Page:

In landing page, User can search articles that have already been published. Author can create a new article and Use can see all the articles listed below. Articles are grouped into four tabs. Published, In Review, Draft and Pending for Approval tabs.

- **Published tab:** User can see all the published articles. Viewer can only see the Published tab.
- In Review tab: Author and Approver can see the article which is in review.
- **Draft tab:** Author can see the draft article that he/she saved as a Draft.
- **Pending for Approval tab:** Only visible for Approver. All the newly created article is placed under "Pending for Approval" tab for Approver.

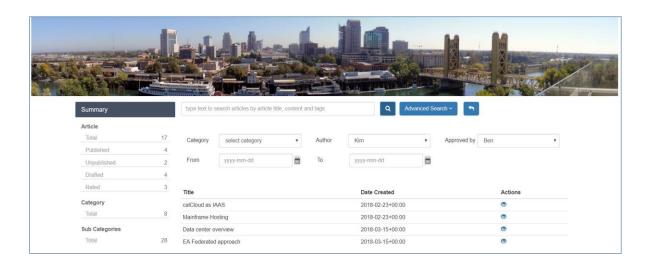
4. Search Article:

User can browse through the articles that have already been published. User can search articles and associated tags by providing search criteria so that User can find the article he/she is looking for.



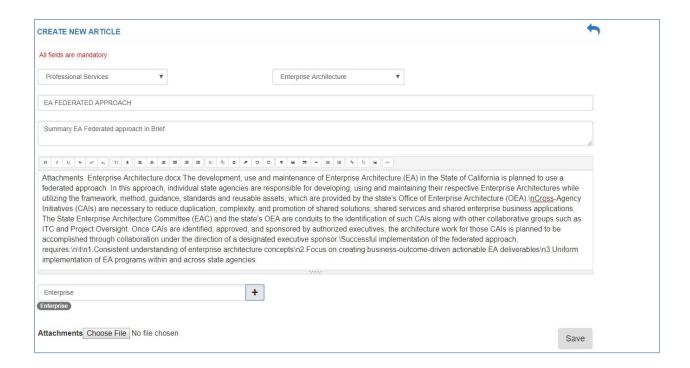
How to search article:

- 1. Enter article title, article content or associated tags as a search criteria.
- 2. Click on the search icon to see the related articles below.
- 3. User can also enter any of the most popular tags in the search criteria textbox to see the related articles below.
- 4. Click on the Advanced Search button to the see the advanced search option below.
- 5. In Advanced search, User can search published articles by selecting article category, author name and approver name from the dropdown menu and from date range.
- 6. Click on the search icon to see the related published articles below.



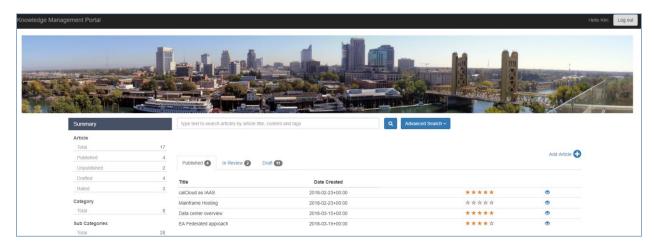
5. Add Article:

User creates a new Knowledge Article so that he/she can share that knowledge with other employees and customers.



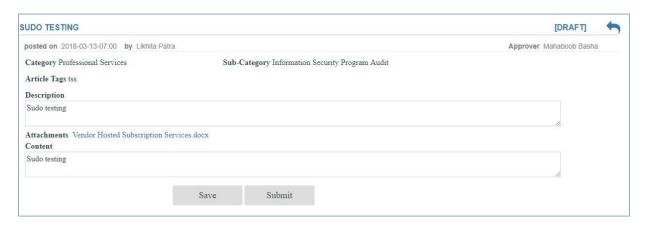
How to create article:

1. On the landing page, click on the Add Article 🕂 icon to open create new article.



- 2. Select an appropriate Category for the new article from the dropdown list to classify that article.
- 3. Select an appropriate Sub-Category for the new article from the dropdown list to classify that article.
- 4. Provide an appropriate Article Title. This is a mandatory field.
- 5. Provide Article Summary. This is a mandatory field.
- 6. Enter the Article Content in the text editor.
- 7. Add necessary keywords as tags to search the article efficiently.
- 8. Upload an existing document to share with other employees and customers.

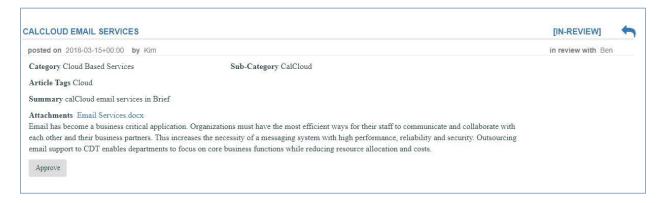
- 9. Click on the Save button to save the newly creates article as draft so user can work on the article at a later point in time. This would appear in the Drafts tabs on the landing page and can be accessed later by logging in to the portal by the Author.
- 10. Click on the Draft tab on the landing page. User can see his/her article name there. Click on the view icon to view the draft article. Click on the Submit button to submit the new article to the Approver to share that knowledge with other employees and customers.



11. The newly created article is placed under "Pending for Approval" tab for Approver.

6. Article Approval:

Once a new article is submitted, an email is sent to the Approver by the system notifying the Approver that a new article has been added for review/approval. And Author also gets an email notification when Approver approves and publishes the article.



How to search article:

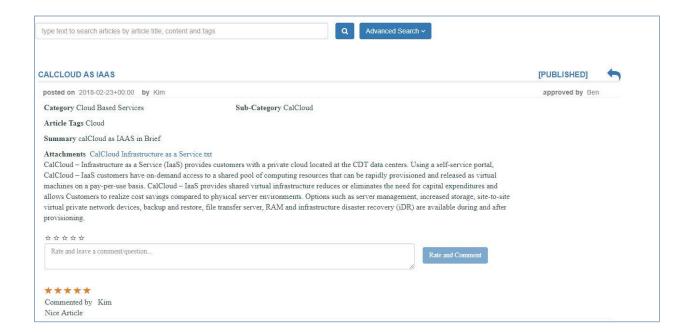
 Approver User receives email notification when a new article is submitted for approval and the User takes quick action on these articles. Approver's email information is described in the below table.

- 2. Approver reviews and updates (as required) the articles submitted for approval. Once the Approver is ready to update the article, he/she can visit the Pending for approval tab and make the necessary change to that article.
- 3. Approver approves and publishes the articles by clicking the approve button.
- 4. Author User receives an email notification when Approver approves and publish his/her article.

Webmail URL:	https://apps.rackspace.com/a/index.php?version=full
Email ID:	kmtadmin@xfusiontech.com
Password:	kmtadmin2018#

7. Knowledge Article Learning, Feedback and Rating:

User can view the ratings and comments for the existing published articles in the portal so that user gains the understanding about the popularity, demand and effectiveness of the articles and derive the need for future articles.



How to view article:

- 1. To view or learn the article click on the view icon in published tab.
- 2. User can view the ratings and comments for the existing articles.
- 3. User can also view the list of most popular tags so that user can understand the demand for knowledge articles in specific areas.
- User can rate the knowledge article by clicking the star icons ≠.
- 5. User can provide comments and feedback in the feedback textbox by clicking Rate and Comment button.

8. Log out:

To logout, click on "Log out" button in the top header menu from any page. User will be logged off and taken to the Log in Page.