Knowledge Base Workflow

Overview

This article provides guidance on creating net new content and editing existing information on an article as an author.

The created/edited article should go through a technical review > editorial review prior to being published. This article provides how-to information on moving content through the review workflow.

Note: While creating the content, make sure that the Page Settings are updated per article. This helps the editor publish the article accurately to the appropriate audience.

Creating Net New Content

The following procedure walks you through the creation of new knowledge articles.

1. Navigate to [Knowledge Base Reviews](#).
2. Select the [Drafts](#) category.
3. Click **New**.
   This opens the New Page dialog allowing you to select the appropriate template.
4. Select a template page (e.g. **KBA (Delphix)**) and click **Create**.
   This opens the newly created page in edit mode.
5. Add the article title.
6. Click **Save**.
7. Copy the KBA number and append it to the end of the article title, for example, Article Title (KBA1234)
8. Edit the body of the article:
   Note that the article template is to be used as guidance and as an author you have flexibility to add/remove sections.
   - Add content as necessary.
   - Add screenshots. Attach the image to the article and then link the attachment.
   - Omit references to I, we, customer, systems, IP addresses, proprietary naming, datafile paths, actual customer naming conventions, and names of actual customers.
   - Remove unnecessary sections.
   - Optionally, remove the gray comment boxes.
   - Add internal only content in the conditional text box.
   - Add links to related articles using a bulleted list.
   - Do not remove any *dekiscripts* on the article.
9. Click **Save**.
   This saves the article, displaying it in Read mode.

10. To set the article metadata, expand the Page Settings section and close when completed.
    - **Article Type**: This is defined by your template. Do not edit.
    - **Author**: Select the author's name (your name).
    - **Technical Reviewer**: This will be selected by the technical reviewer of the article.
    - **Article Path**: Select the category to which you want this article added at publication.
    - **Tags**: Add the article number and other keywords to improve findability. Tags help users find information and drives the related articles
11. If the article is ready for review, move it to the Technical Review category.

Editing a Published Article

1. Navigate to the article that needs to be edited.
2. Select the Article to edit.
   Note: To maintain a current copy of article while editing you need to make a copy for edit. If you do not want the article to remain accessible while it is worked on, use the Move option and move the article to the Drafts category.
3. Click **Options > Copy**.
   This opens a Copy page dialog.
4. Browse and select the Drafts category.
   Home > Knowledge Base Reviews (KBA) > Drafts
5. Select **Copy page**.
6. Edit the (copied) article in the Drafts category:
   Note that the article template is to be used as guidance and as an author you have flexibility to add/remove sections.
    - Add content as necessary.
    - Add screenshots. Attach the image to the article and then link the attachment.
    - Omit references to I, we, customer, systems, IP addresses, proprietary naming, datafile paths, actual customer naming conventions, and names of actual customers.
    - Remove unnecessary sections.
    - Optionally, remove the gray comment boxes.
    - Add internal only content in the conditional text box.
    - Add links to related articles using a bulleted list.
    - Do not remove any *dekiscripts* on the article.
7. Click **Save**.
   This saves the article, displaying it in Read mode.
   Important: Do not change the KBA number in the title. The dekiscript may create a new KBA number, but do not change the title KBA number for an existing article.
8. To set the article metadata expand the **Page Settings** section and close when completed.
    - **Article Type**: This is defined by your template. Do not edit.
    - **Author**: Select the author's name (your name).
    - **Technical Reviewer**: This will be selected by the technical reviewer of the article.
    - **Article Path**: Select the category to which you want this article added at publication.
    - **Tags**: Add the article number and other keywords to improve findability. Tags help users find information and drives the related articles

Tip: In cases, where very small amounts of information are changed (for example, the update of a URL, release update, grammar update, or small clarification) or situations where the Author and the SME are one the same, the Technical Reviewer can move a KBA from Drafts to Editorial Review. This should be an outlier case. Remember, this shortened review process is only for quick corrections, not for rewrites nor for lengthy updates.

9. If the article is ready for review, move it to the Technical Review category.
    Home > Knowledge Base Reviews (KBA) > Technical Review

Moving Content for Technical Review

1. Navigate to [Knowledge Base Reviews](#).
2. Select the [Drafts](#) category.
3. Select an article for technical review.
4. Click **Options > Move**.
    This opens the Move dialog. Browse to **Home > Knowledge Base Reviews (KBA) > Technical Review**.
5. Click **Move page**.
    This moves the article to the Technical Review category.
    Once you move the article, the Technical Reviewer group will be notified through a Daily Digest that a new article is ready for review.

Keeping the URL in Sync with Title

1. Select the article for which you need to edit the title.
2. Copy the Page Title.
3. Click the **Article Title > Edit icon**.
    This displays a URL link box.
4. Click the **Link icon**.
    This allows you to edit the URL link in the link field.
5. Paste the copied title into the URL link field.
6. Click **Update title**.
    This updates the title and displays the change.
7. Verify the URL and Title are in sync.

Reviewing Content as a Technical Reviewer

As a technical reviewer you will be notified by email of articles ready for review. Based on your expertise, select articles for review and add yourself in Page Settings as Technical Reviewer.

1. Select the [Technical Review](#) category.
    This displays all the articles ready for technical review.
2. Select an article to edit.
    This displays the article.
3. Click **Edit**.
    This opens a Create Draft dialog, click Edit live. This opens the article for edit.
4. Review the article:
    *   Add content as necessary.

- Add screenshots. Attach the image to the article and then link the attachment.
- Omit references to I, we, customer, systems, IP addresses, proprietary naming, datafile paths, actual customer naming conventions, and names of actual customers.
- Remove unnecessary sections.
- Optionally, remove the gray comment boxes.
- Add internal only content in the conditional text box.
- Add links to related articles using a bulleted list.
- Do not remove any *dekiscripts* on the article.

5. Click **Save**.

   This saves the article, displaying it in Read mode.

6. To set the article metadata expand the Page Settings section and close when completed.
   - **Article Type**: This is defined by your template. Do not edit.
   - **Author**: Do not update the author's name.
   - **Technical Reviewer**: Select the technical reviewer of the article (your name).
   - **Article Path**: Select the category to which you want this article added at publication.
   - **Tags**: Add the article number and other keywords to improve findability. Tags help users find information and drives the related articles

7. *If article is ready for publication,* move the article to the Editorial Review category.

8. *If you find that this article needs to be reworked,* move the article back to the Drafts category.
   a. Click **Options > Move**.

      This opens the Move dialog. Browse to **Home > Knowledge Base Reviews (KBA) > Drafts**.
   b. Click **Move page**.

      This moves the article back to the Drafts category.

Moving Content for Publication (Editorial Review)

1. Navigate to the Editorial Review category.
2. Select an article for Publication.
3. Click **Options > Move**.

   This opens the Move dialog. Browse to **Home > Knowledge Base Reviews (KBA) > Editorial Review**.
4. Click **Move page**.

   This moves the article to the Editorial Review category.

   The editorial reviewers will be notified once an article moves into Editorial Review allowing the reviewers to select and publish articles.

Reviewing Aging KBAs

A core principle of KCS (Knowledge Centered Support) is that *use is review*. Before providing a KBA link to a customer, review the article to be sure it is up to date and accurate.

- If an aging KBA does not need to be improved, a Technical Reviewer may use the Technical Review Complete button on the article to automatically reset the aging clock:

- If a published KBA needs improvement, follow the "Editing a Published Article" process above.

Archiving or Deleting Knowledge Base Articles

If you find an article which has become redundant with documentation and needs to be archived or deleted for any other reason, please inform the team by mentioning it in the #kms channel of slack.

A member of the KMS core team will complete the following process:

1. Decide whether the article should be archived or deleted.
2. If the decision is to archive, pay attention to whether the article is internally or externally facing.
3. If the article is internal, move the article to https://support.delphix.com/Archived_Internal.
4. If the article is external, move the article to https://support.delphix.com/Archived_Articles.
5. Edit the article and use the note template to insert a cross reference, if applicable, to the documentation source or other source which supersedes the content. Click **Elements > Templates > Template: Note**.
6. Also, update the summary field to insert a cross reference, if applicable, to the documentation source or other source which supersedes the content.

   a. Click the Summary section **Edit icon**, add the archive or delete note, and click **Save**.

   b. Add the following archive language with the new source inserted for <our documentation> and the link inserted for <link>: This article is no longer current and is superseded by <our documentation>: <link>.

   c. Add the following sample delete language: This article is no longer needed as the functionality has been deprecated. -OR- This article is a duplicate of KBAxxxx <link>

Understanding Delphix-Only Internal Text

Nothing you type here will be searchable. Be sure that the information you place here is unnecessary to find the article by Delphix staff or customers. If there is a large amount of content being placed here, consider creating a Private knowledge article. Private articles are searchable by those with permission.

Suggested uses: Jira issues associated with the issue described and links to private knowledge articles. Please use this section sparingly.

Related Articles

- [Frequently Asked Questions: Review Workflow](#)