

Knowledge Management

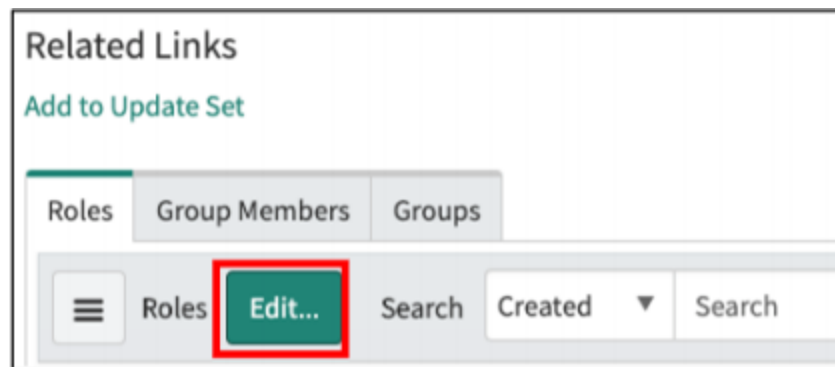
Scenario: The Infinity testing coordinator will provide guidelines for enrolling in Infinity testing to be published in the HR knowledge base. The System Administrator will grant authoring permissions to create, review and publish articles to the members of the HR group.

A. Exploring the Human Resources Group

1. As the System Administrator, go to **User Administration > Groups**
2. Create the **Human Resources** group by selecting **New**.
3. In **Name** type Human Resources, **Under the Description**, type the following: **This group contains the individuals with the Knowledge Manager role.**
4. Select **Submit** to create the Human Resources group record.

B. Assign Roles and Users to the Human Resources Group

1. Go to the Human Resources Group, go to the **Roles** tab under the Related Lists then click **Edit...**



2. Using the list collector, move the **knowledge_manager** and the **itil** role to the Roles List by double clicking on the role then click **Save**.

Add Filter Run filter ?
 -- choose field -- -- oper -- -- value --
 Collection Roles List
 Search knowledge Human Resources
 knowledge itil
 knowledge_admin
 knowledge_manager

3. Under the Groups Member tab (under the Related Lists), add Gracie Ehn and Jasmin Gum to the Human Resources Group.
4. Select **Update** in the Human Resources group record.

C. Create a new IT Knowledge Base Article

1. Impersonate **Jasmin Gum** (member of the Human Resources Group), navigate to the **Knowledge > Import Articles**.
2. Fill out the form as follows
 - i. **Knowledge Base:** Knowledge
 - ii. **Category:** [leave it blank]
 - iii. Select the Browse Files button and browse your computer for a Microsoft Word document (.docx) or any Word doc will be fine.
 - iv. Double click the file name *(Note: Multiple files can be uploaded by dragging and dropping into the **Import a Word File** box)*
 - v. Click the **Import** button. (See example below)

* Knowledge Base

1 Human Resources X ▼

Category

2 Select an option... ▼

* Import a Word File

Drag and drop DOC or DOCX files here
or

3 Browse Files

Article 1

Infinity_Open_Enrollment

Imported Document: Infinity_Open_Enrollment.DOCX

Import 5

3. Click **Continue** in the **Uploading Knowledge Articles** dialog box.
4. Click the **knowledge article link** in the **Import Completed** dialog box.
5. Click the **Edit** button from the header

< Home / General Flag article Create Incident Edit

★

Infinity_Open_Enrollment

KB0010305

☆☆☆☆☆ 1 views

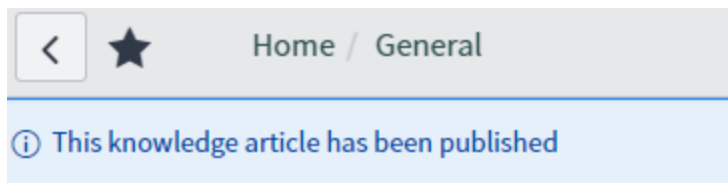
6. Select the **Publish** button

< Knowledge KB0010305 Publish Retire Update Search for Duplicates Delete

Number Article type

(Note: The default workflow for the Human Resources Knowledge Base is Knowledge-Approval Publish, this means that it goes into the Review state and other users with permissions can view the article before approving and publishing the article.)

7. Verify the information message “This knowledge has been published” is displayed.



8. **Close** the current tab and **Close** the Import Completed dialog box.
9. **End Impersonation.**
10. Go to **Knowledge > Published**
11. Open the published article you just uploaded to confirm the article by **Jasmin Gum** appears.

D. Create and Apply User Criteria

The Human Resources Knowledge Base is public to all users who have access to the **Self-Service Knowledge** module in the Cloud Dimensions instance. The System Administrator will create a user criteria to control who views the content.

1. As the System Administrator, go to **Knowledge > Administration > User Criteria** then click **New**.
2. Enter the following information

Name: **Cloud Dimensions Employee**

Companies: **Cloudward Inc**

*Note: To select Cloudward Inc, click on **Unlock Companies** (padlock icon), type cloud, select **Cloudward Inc**, and click **Lock Companies** (open padlock icon)*

* Name

Application

Active ☒

Companies

Locations

Departments

Match All ☐

Users

Groups

Roles

Advanced ☐

Unlock Users

3. Click **Submit** to create the Cloud Dimensions Employees User Criteria record.
4. Go to **Knowledge > Administration > Knowledge Bases**
5. Locate and open the **Knowledge** record.
6. Scroll down and select the **Can Read** tab

Knowledge (3) Questions **Can Read** Can Contribute

Can Read New Edit... Search Can Read

Knowledge Base = Human Resources

Can Read

7. Select **Edit...** to add an *existing* User Criteria record to the Can Read list
8. Add **Cloud Dimensions Employees** to the **Can Read** List using the lits collector interface. Select **Update**.

Collection

Can Read List

Human Resources

Cloud Dimensions Employees

'Problem Analyzers' and 'Problem Solving' Gr
All ACME Corporation employees
Users with 'Admin' Role
Users with 'cmdb_read' Role
Users with 'knowledge' role
Users with 'scrum_master' or 'scrum_admin' r