

Infiniti KMT Prototype Screen Shots

This document includes screen shots of the Infiniti KMT prototype including the integration of Machine Learning and Predictive Learning.

Run Instructions:

To run the Infiniti KMT, go to this link:

<http://kmt.infiniticloud.com/infiniti/logon.do?.page=home.do>

Login with one of the following sets of user credentials.

Login as a Tax Auditor:

Username: asmith Password: Password1!

Login as a Tax Specialist:

Username: pparker Password: Password1!

Login as a Protest Hearing Officer

Username: pwise Password: Password1!

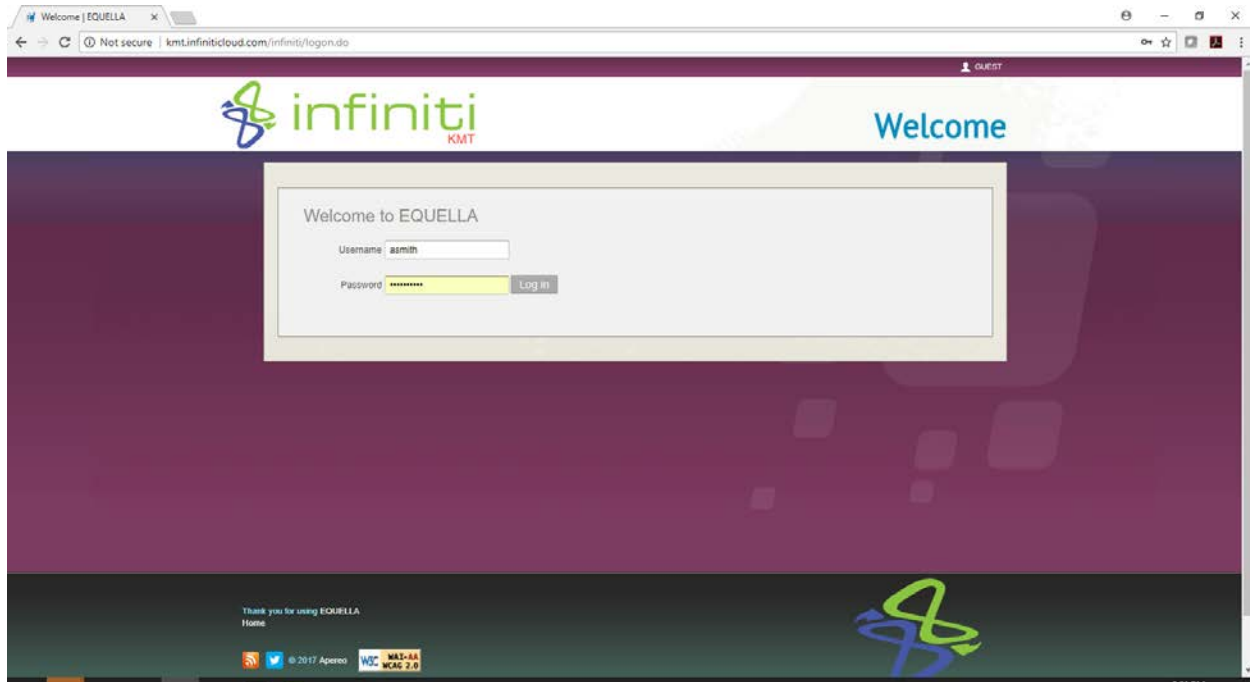
Login as an Admin

Username: bjensen Password: Password1!

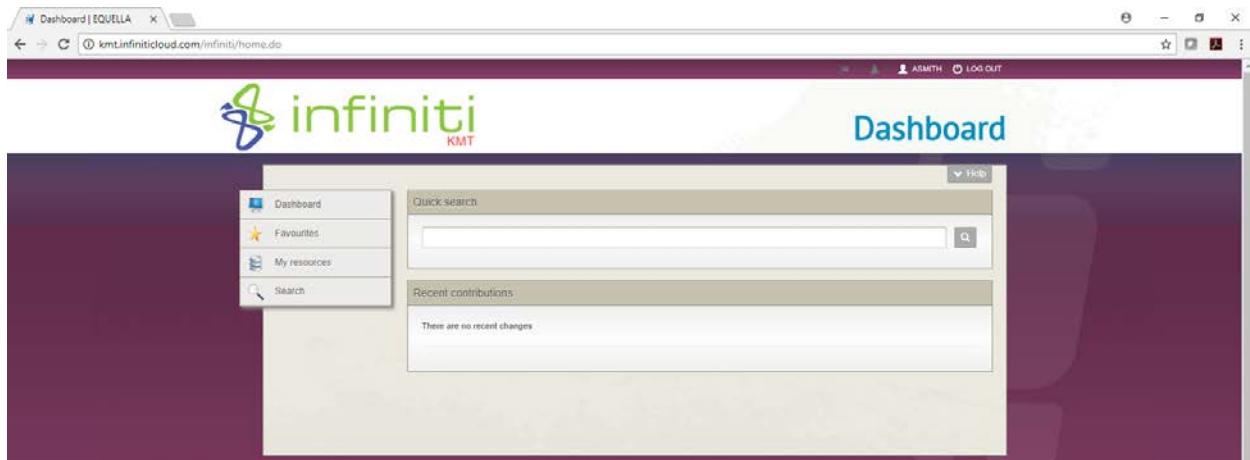
Logging in and Searching for a Knowledge article:

B1: Knowledge Sharing – Tax Auditor:

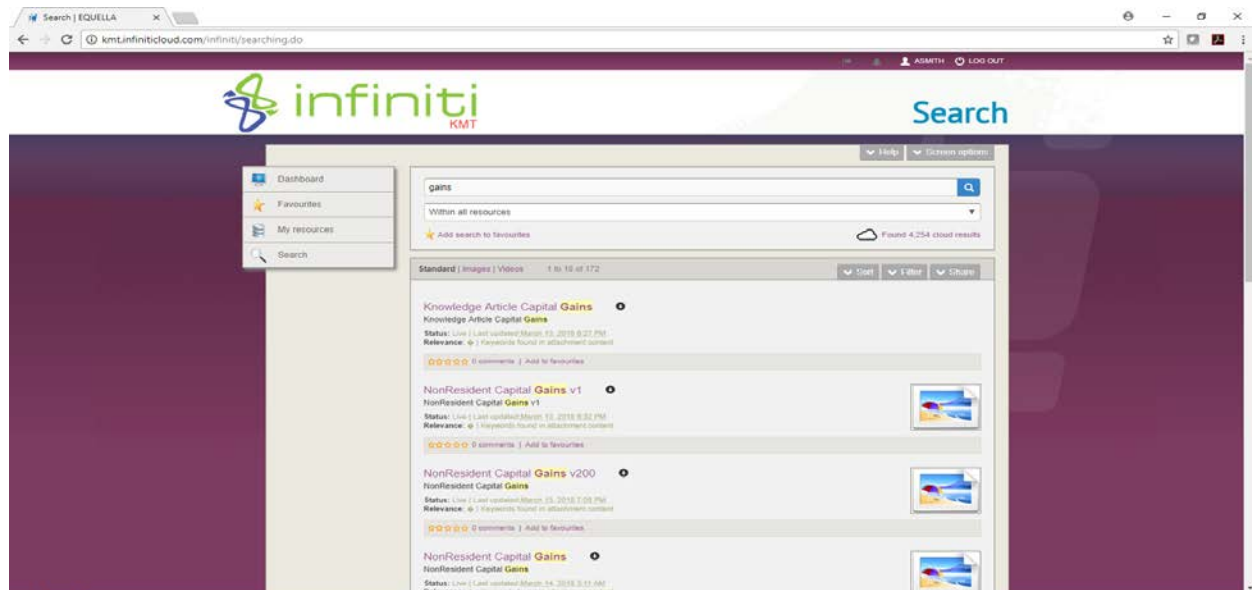
Below is the login page where user name and password are entered.



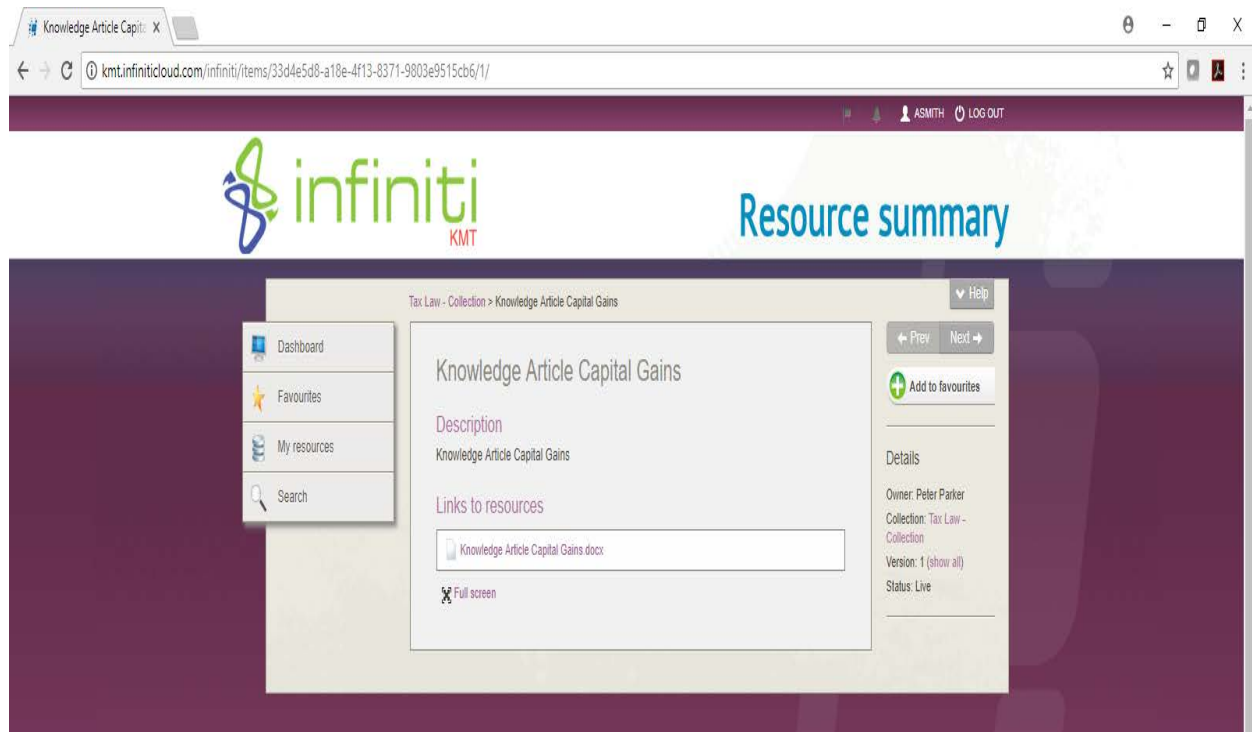
Below is the Dashboard page that allows the user (in this example a tax auditor) to navigate and enter search for knowledge articles:



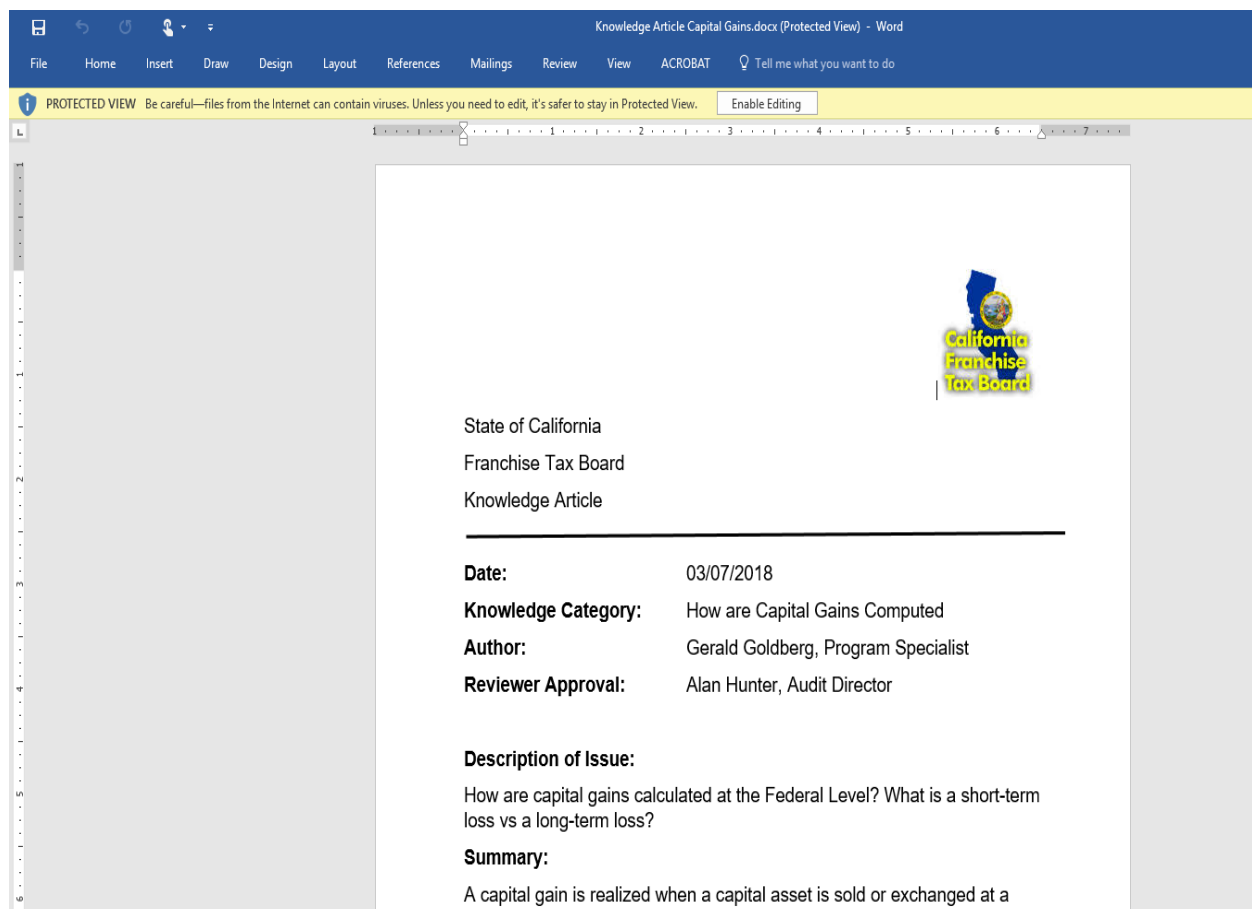
This page shows the results of Tax Auditor searching for Knowledge Articles on about “Capital Gains”. The search returned 172 articles from the KMT database.



Clicking on an article opens the detail page that shows the date and creator of the article.



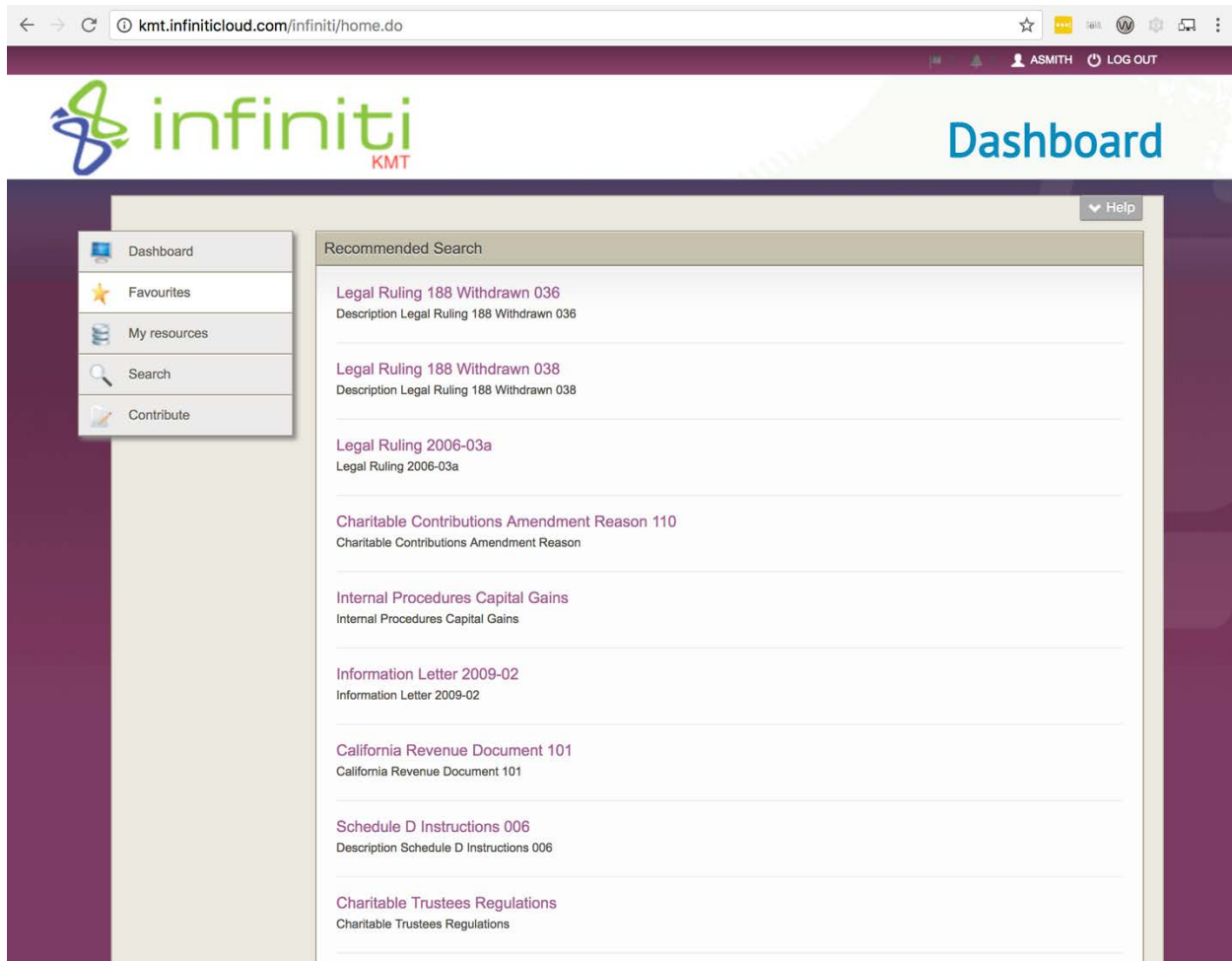
Clicking on the link opens the article



A1: Knowledge Creation – Tax Auditor:

Logging in and submit a new draft Knowledge Article (KA) for submission to Tax specialist:

After logging in as asmith (Auditor) click on Contribute.








This gives the tax auditor the ability to contribute Knowledge Articles into Knowledge Sharing collection to submit a new tax law proposal or an addendum. After entering details, tax auditor will select “I would like to enter workflow for review” and save.

← → ↻ Ⓞ Not Secure | kmt.infniticloud.com/infniti/access/runwizard.do?.wizid=f2118a5d-f66e-4605-814f-f0261a60d0fc&pages.... ☆ 📄 📄 📄 ⚙️ 🖨️ ⋮

ASMITH LOG OUT

Knowledge Sharing Collection

Contribute > Knowledge Sharing Collection



Item Details

Item Name *


Item Description

attachments

3726 Form.pdf [Edit](#) | [Replace](#) | [Delete](#)

Options *

☒ I would like this resource to enter workflow for review

 Save

[Save and continue](#) | [Cancel](#)

▶ Item Details *

▶ Preview


▶ Select thumbnail

Save

Do you want to submit this item for moderation now, or save as a draft?

Optional message for moderators:

Please review

 Submit for moderation

Save draft

Cancel

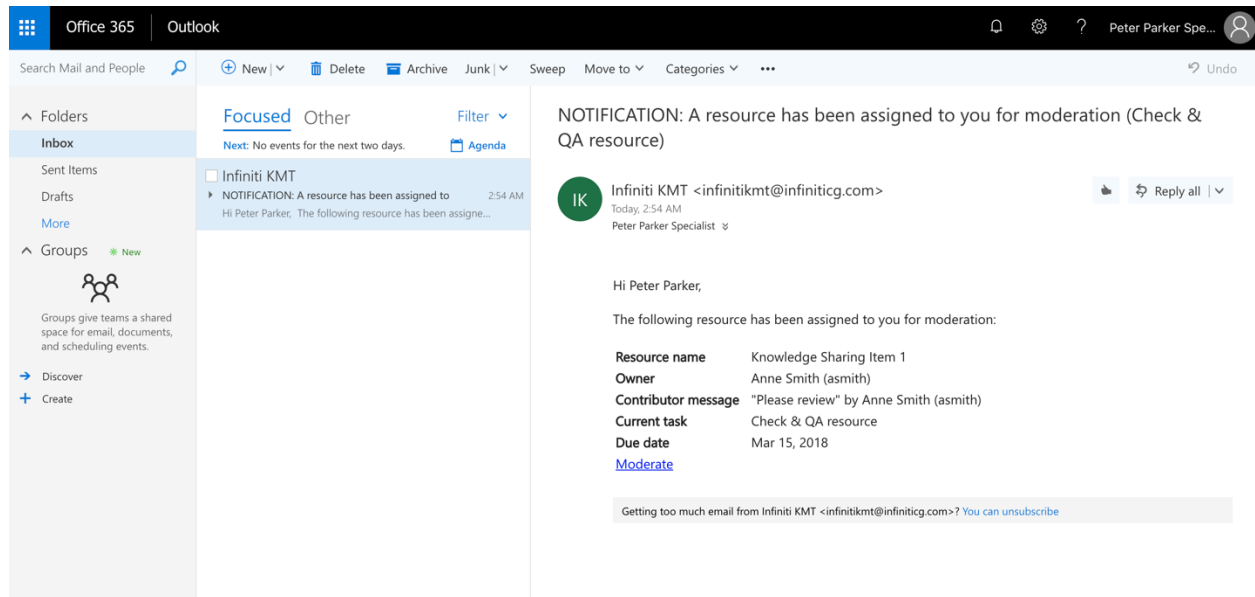
After clicking submit for moderation, Infiniti KMT will send an email notification to the tax specialist alerting a task has been assigned. (The email is sent via the AWS Amazon Simple Email Service (Amazon SES) which is a cloud-based email sending service).

For the purpose of this prototype Infiniti setup a new Office365 email account for pparker (tax specialist) which can be accessed using the following URL, Username, and Password:

URL: <http://outlook.office365.com>

Username: pparkerspecialist@infiniticg.com

Password: Password1!



Note that the email contains a hyperlink “Moderate” that will take the Tax Specialist to the Infiniti KMT login screen

B2: Knowledge Sharing and Moderation – Tax Specialist:

After logging in as pparker (Tax Specialist) clicks on the notifications icon on the top navigation bar to review the assigned task.

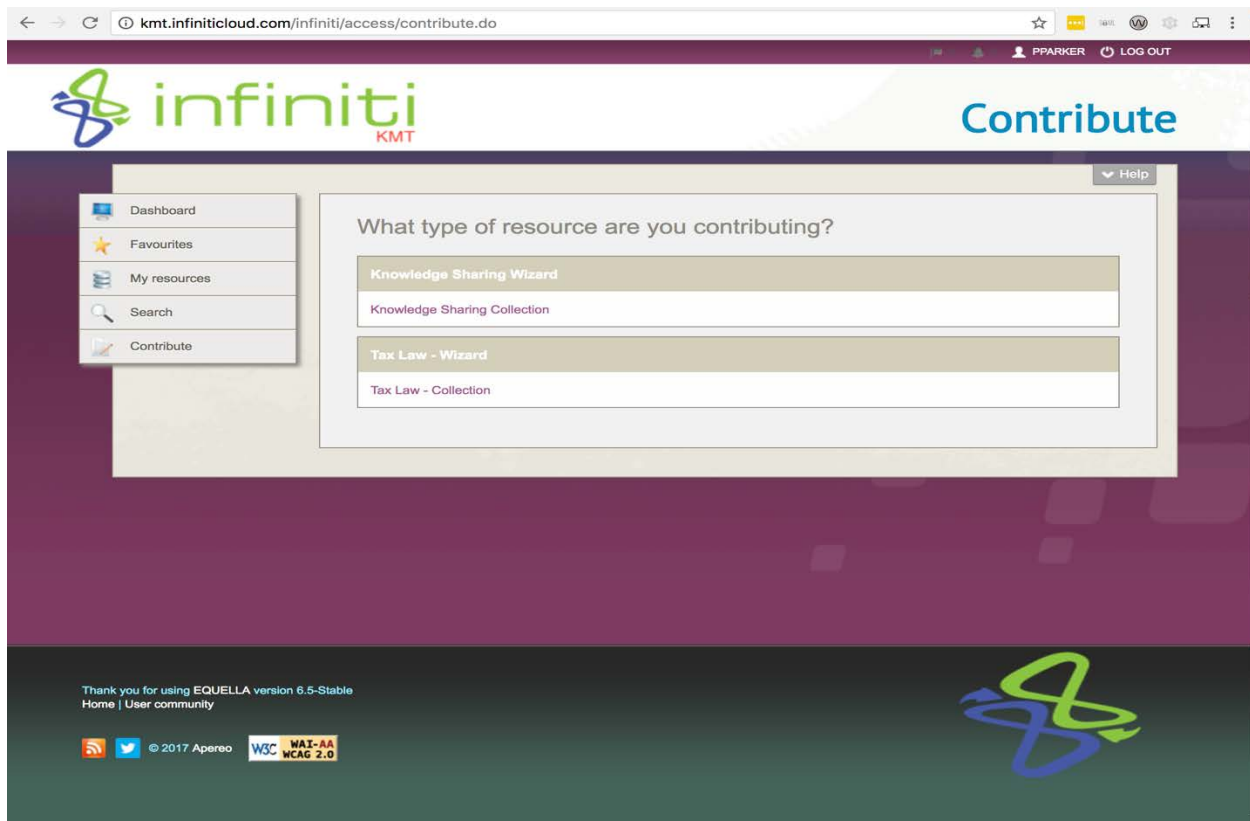
The screenshot shows the 'My tasks' page in the KMT Infiniti system. The user is logged in as 'PPARKER'. The page displays a task titled 'Addendum to current capital gains' with a status of 'Moderating'. The task details include: 'Status: Moderating | Last updated: March 15, 2018 10:36 AM', 'Moderating since: March 15, 2018 10:36 AM', 'Workflow: Knowledge Sharing Workflow', 'Task: Check & QA resource | Expires: March 16, 2018 10:36 AM', 'Time at this task: about a minute', 'Priority: High', and 'Assigned to: Me'. The task is currently at 'Moderation progress | 1 moderation comment'. On the right, there is a 'Selection (0)' section with a button to 'Moderate selected'.

The Tax specialist will now have an option to moderate the document and after review should be able to approve and/or reject. Once approved, the item will now be part of the knowledge sharing collection and can be shared across all tax auditors and other users.

The screenshot shows the 'Knowledge Sharing Collection' page in the KMT Infiniti system. The user is logged in as 'PPARKER'. The page displays a document titled 'Check & QA resource' with a status of 'Moderator, please check and QA the attached resource'. The document details include: 'Assigned to: Me (cancel assignment)', 'Submitted by: Anne Smith for moderation by Peter Parker', and '1 comments (post a comment)'. The document is currently at 'Please review' status. On the right, there is a 'Moderation' section with buttons for 'Edit resource', 'View summary', 'Approve', 'Reject', and 'Item Details'. The 'Item Details' button is highlighted.

A2: Knowledge Creation – Tax Specialist:

After logging in as pparker (Tax Specialist) clicks on the contribute option. This give the tax specialist the ability to contribute Knowledge Articles into two different collections (channels), either Tax Law or Knowledge Sharing. The Tax Law collection is only available to Internal Tax Department users whereas the articles in the Knowledge Sharing collection can be accessed to review newer contributions from auditors to add to the collection.



Once the Tax Specialist select the collection they want to contribute into they see this page which allows them to enter details about the Knowledge Article (KA). The KA can be an uploaded document (e.g. a PDF) or text can be entered directly on this page.

Tax Law - Collection | EC | X

kmt.infiniticloud.com/infiniti/access/runwizard.do?wizid=aa48032e-895e-497f-a045-83f29a75e9ea&pages.pg=-1

infiniti KMT

Tax Law - Collection

Contribute > Tax Law - Collection

Save

Save and continue | Cancel

Item Details *

Preview

Select thumbnail

Item Details

Item Name *

Description

Please enter description of the resource

Author

+ Add

Contributor

+ Add

Contribution Type *

Select

No terms selected

Attachments *

No attached resources

+ Add a resource

Click to select files or drag and drop files here

C: Knowledge Development:

The objective of the project is to utilize the valuable user interaction data in the KMT to improve user experience with the KMT. By utilizing past usage of knowledge articles by various users within the organization, it is possible to generate customized recommendations for each user as they log in to the portal. One example of this is the development of a recommender engine. Infiniti KMT as part of the current prototype will share the top reviewed articles learning from existing records usage.

We implemented a Machine Learning (ML) model to implement the recommender engine which results in the “Recommended Search” items in the screen print below.

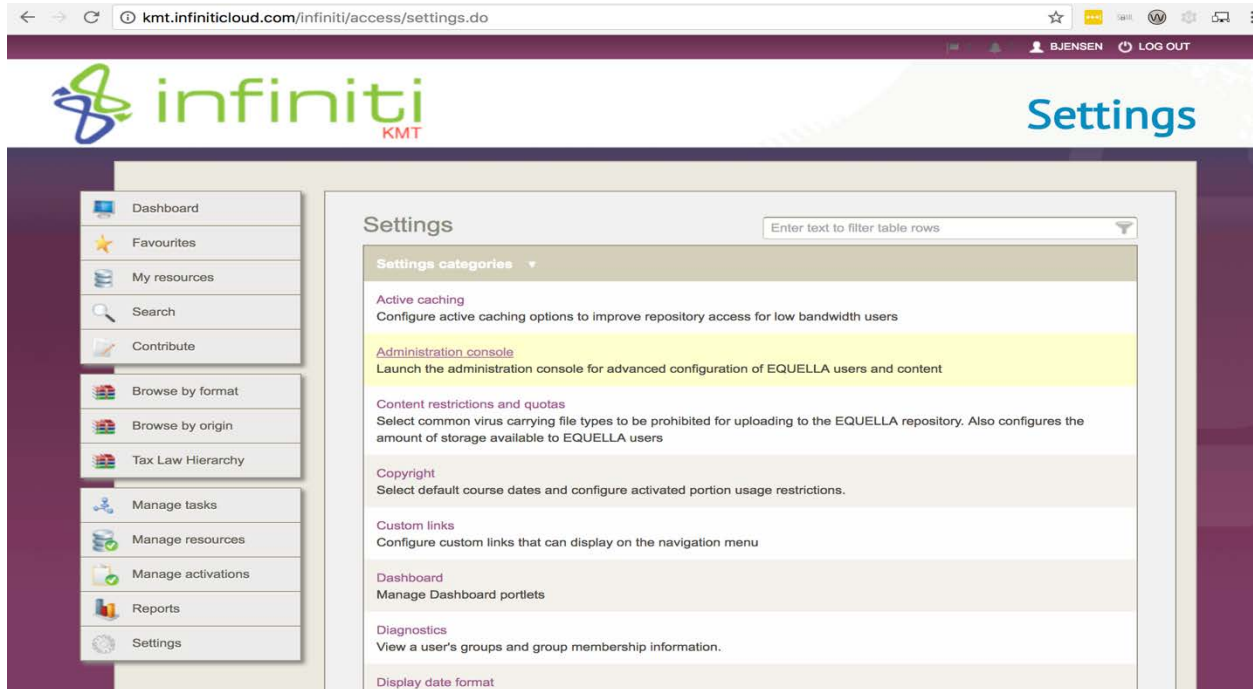
This is shown to a tax auditor or tax specialist. Once asmith or pparker logs in, a recommender search portlet on the dashboard will show the top articles by usage.

The screenshot displays the Infiniti KMT Dashboard. The top navigation bar includes the Infiniti KMT logo, a 'Dashboard' title, and user information (ASMITH) with a 'LOG OUT' link. A left sidebar contains navigation links: Dashboard, Favourites, My resources, Search, and Contribute. The main content area features a 'Recommended Search' section with a list of articles. A yellow callout box points to this list with the text: 'The recommended Knowledge Articles were identified by our Machine Learning model'.

Recommended Search
Legal Ruling 188 Withdrawn 036 Description Legal Ruling 188 Withdrawn 036
Legal Ruling 188 Withdrawn 038 Description Legal Ruling 188 Withdrawn 038
Legal Ruling 2006-03a Legal Ruling 2006-03a
Charitable Contributions Amendment Reason 110 Charitable Contributions Amendment Reason
Internal Procedures Capital Gains Internal Procedures Capital Gains
Information Letter 2009-02 Information Letter 2009-02
California Revenue Document 101 California Revenue Document 101
Schedule D Instructions 006 Description Schedule D Instructions 006
Charitable Trustees Regulations Charitable Trustees Regulations
Knowledge Article NonResident Real Property Sale Capital Gains v1

Administrator:

After logging in as bjensen, the administrator of Infiniti KMT, there are various options to customize the KMT, create role based access per collection (Channel), configure channels per job function, customize various portlets and themes and user administration.



ADMINISTRATION CONSOLE

User Management

Metadata Schemas	
Collection Definitions	
Advanced Searches	
Dynamic Collections	
Taxonomies	
Workflow Templates	
Hierarchy Editor	
Reporting	
Harvester Profiles	
Remote Repositories	
Courses	
User Management	
Security Manager	

LDAP	<input type="checkbox"/>
Replicated Datastore	<input type="checkbox"/>
Internal Users	<input checked="" type="checkbox"/>
Internal Groups	<input checked="" type="checkbox"/>
Internal Roles	<input checked="" type="checkbox"/>
Suspensions	<input type="checkbox"/>
CAS	<input type="checkbox"/>
Shared Secrets	<input checked="" type="checkbox"/>
Share Pass	<input checked="" type="checkbox"/>
Remote Support	<input checked="" type="checkbox"/>
External Authentica...	<input type="checkbox"/>
Canvas	<input type="checkbox"/>