Technology Help (TC3.1)

Contents

Chapter 1. Open and Search the Knowledge Base

Navigate to the Knowledge Base and use the search options to find articles.
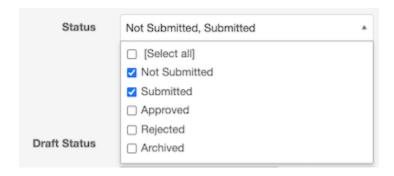
Search the Knowledge Base

There are multiple search options to narrow results in the Knowledge Base.
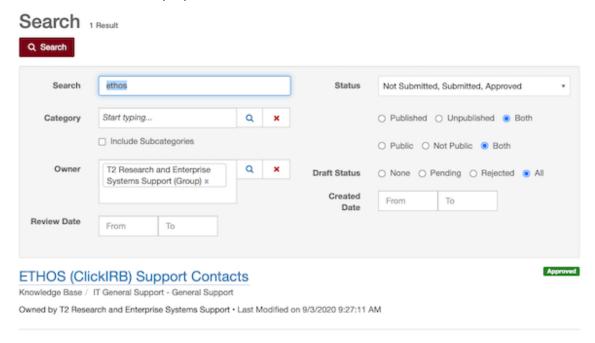

Search: Enter search terms here.

- **Status:** Use the dropdown menu to search by status.

  - Default is set to **Approved**.

  - You can use the checkboxes to search by one or more statuses.

- **Category:** Start typing or use the **Lookup Category** option.

- ◦ Always **Search** by **Both.**

- ◦ Public does not mean published to the IT website ([it.umn.edu](it.umn.edu)).

- ◦ Include the **Include Subcategories** checkbox if you want to include articles intended for a specific audience in your search results.

• **Owner:** Start typing a person's name or a Group name.

- ◦ You can also use the **Lookup Owner** option if needed.

- ◦ *The Assignment Lookup window will open with options for filtering.*

- ◦ You can leave all the filter options as is to search for Groups.

• **Review Date:** Enter **From** , **To**, or both dates.

• **Published, Unpublished,** or **Both:** Choose from the radio button options.

- ◦ Default is **Both.**

- ◦ Select **Published** to limit your search to articles published to the IT website.

• **Public, Not Public,** or **Both**: Choose from the radio button options.

- ◦ Leave this options as the default **Both.**

- ◦ Public articles are viewable in the Client Portal with no login. None of our articles should be marked Public.

• **Created Date:** Enter **From, To,** or both dates.

Navigate to the Knowledge Base

Find the Knowledge Base through the Applications menu.

1. Click the **Applications menu**.
    a. Select **Client Portal** if necessary.
2. Click **Knowledge Base** in the menu bar.

Chapter 2. Create a New Knowledge Base Article

Follow these steps to create a new Knowledge Base article and change the ownership to the appropriate Group.

1. Navigate to the **Knowledge Base**.

    For guidance, visit Navigate to the Knowledge Base *(on page 5)*.

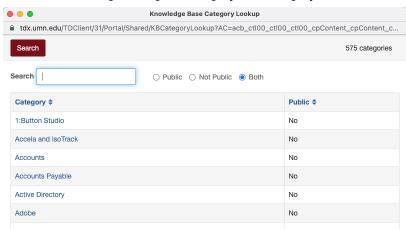2. Verify your intended new article is not already covered in the Knowledge Base.

    For guidance, visit Search for Duplicate Articles *(on page 8)*for guidance.

3. If there is no duplicate article, click **+New Article**.

    The New Article form will appear.

4. Enter the article **Category.**

    See TDX Knowledge: Assign a Category/Subcategory to the Knowledge Article.

    Click the **Lookup Category** icon to do a search of categories.

    DO NOT change the **Order** field.

    DO NOT click the **Pin Article** checkbox.

5. Enter the **Subject** (article title).

6. Enter article content in the **Body** field.

    Visit Enter Body Field Article Content *(on page 9)*for guidance.

    DO NOT include the title for the article in the Body field.

    Do include a summary to provide context for what follows. This can be a single sentence.

    Format the article as needed following our standards. Visit Format for Internal and Public-Facing Articles *(on page 8)* for guidance.

7. Enter an **Article Summary.**

    Use under 100 characters if possible.

    Visit List of Article Types *(on page 9)* for reference.

8. Enter any **Tags.**

    Tags allow users to search for the aritcle by keywords.

Enter a tag for the technology referred to in the article. For example, "Canvas", "Salesforce".
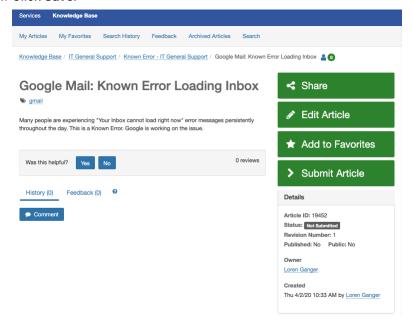
New tag names may only contain alpha-numeric characters or hyphens with no spaces.

You can enter any number of tags.

9. *If you are a Group Editor, follow these instructions:*

     a. Set **Status** to **Not Submitted.**

     b. *(optional) Set the **Next Review Date.***

10. *If you are a Global Editor, follow these instructions:*

     a. Set **Status** to **Not Submitted.**

     b. Change **Owner** to the appropriate **Group**.

11. Check **Notify Owner on Feedback.**

12. (optional) Enter **Knowledge Internal Notes.**

Use this field to enter any information a technician might need to support a customer when the article is published to it.umn.edu.

13. Select the appropriate response to the prompt "Should the viewing of this content be limited to the University community?"

14. Click **Save.**

15. *If you are a Global Editors, change the **Owner** from yourself to the appropriate **Group.***

16. Click **Edit Article.**

17. Change the **Owner** to the appropriate **Group** if needed.

If you are a Group Knowledge Editor or a technician, and you change an article to a group you are not a member of, you will no longer be able to edit the article after changing the Owner.

Everyone in the Group will be able to edit Not Submitted articles owned by the Group.

Group Editors will be able to edit, approve or reject, and archive all articles owned by the Group.

Search for duplicate articles

Before creating a new Knowledge Base article, you need to verify the article is not already covered in the Knowledge Base.

1. Sign in to TDX and select **Client Portal.**
2. Once signed into TDX, click the **Applications menu**and select **Client Portal.**
   A new window (tab) will open.
3. Click **Knowledge Base** in the menu bar.
4. Click **Search** in the menu bar.
   The Search page will appear with multiple search options.
   By default, the Status filter is set to Approved.
5. Choose your search option(s).
   Visit Knowledge Base search options reference file for more.
6. Click **Search.**
   A list of articles that meet your search criteria will appear below the Search options.
   Search results are limited to 300.
7. Click the link to any article that could cover what your new article would cover.
8. Review the article to verify it does not cover what your new article would cover.
9. Repeat the search as necessary to ensure your new article is not already covered in the Knowledge Base.
   You may need to try several searches with different keywords and search options.

Enter article content into the Body field

Follow this guide to summarize the article.

1. Write a summary of the content.
   This can be a single sentence.
   DO NOT included the article title in the **Body** field. This will cause the title to appear twice.
2. Use headings for proper article structure.
3. Follow our article formatting standards.
   Visit Format Internal and Public-Facing Articles for guidance.

Format Internal and Public-Facing Articles

This checklist is for Knowledge Editors to use when formatting an internal or public article following our standards.

Internal standards

- Format topic and subtopic titles as headings.

- Use numbers for steps.

- Use bullets for lists.

- Reference application interface terms just as they appear in the interface.

- Bold application interface terms.

- Give tables a header row.

- Use clean HTML.

Additional public standards

- Order content well.

- Give topics and subtopics a logical sequence.

- Format topic and subtopic titles as not-bold headings.

- Use "ing" verbs when describing a process within the article content.

List of article types

Follow this reference to determine what to write in the article summary based on its article type.

Article type	What to include in the Article Summary
Incident Models	List the application technologies.
Unit Overviews	List the group(s) which support the department.
Published Articles (articles that will be public-facing)	Copy the first sentence of the article.
Other article types	Include a short statement that clarifies the title, if necessary.

Body Field Article Content

Body field article content should be structured according to four points.

- DO NOT include the title for the article in the **Body** field. This will cause the title to appear twice.

- DO include a brief summary to provide context for what follows. This can be a single sentence.

- Use headings for proper article structure.

- If your article was drafted in Google Docs, remove the extra HTML formatting before pasting in your content.

Chapter 3. TDX Knowledge Base Display and Linking

Understand how TDX knowledge base articles are displayed and linked on the Technology Help (IT) website.

TDX knowledge base display

Knowledge base articles can be published into TDX or Drupal.

- Internal articles can only be viewed in TDX.
    - Exception: If an article is marked **Public** (which no article should be), anyone with the link can view it in TDX.
- Published articles can be viewed in TDX or on the Technology Help (IT) website.
- Published articles are pulled into Drupal nightly:
    - Central Standard Time (CST): 5:00 PM
        - Fall/Winter is January-March and November-December
    - Central Daylight Time (CDT): 6:00 PM
        - Spring/Summer is March-November
- Once a new public article has been pulled into Drupal, it will have a Drupal-generated URL based on the article's title.
    - Once pulled, you can find it using the **Self Help Search** for on the Technology Help website, it.umn.edu.
        - In general, new knowledge will be available no later than 6:00 AM the next morning.
        - If there is an emergency need for information to be available sooner, fill out a Service Lifecycle Support equest via z.umn.edu/makeituserfriendly form.

How Linking Works Between TDX and Drupal

Understand how knowledge base article linking works and the recommended limits to updates.

- Links from one article to another must use the TDX link whether an article is for internal use or is public-facing (Published).

- If a published article contains a link to another published article, Drupal will automatically substitute the TDX article link with the Drupal-generated URL.

- When an article title changes, Drupal updates the Drupal-generated URL.

- All changes to articles must be made in TDX.

- Most knowledge editors cannot edit KB articles directly on the Drupal website.

- If there is an urgent need to have an article updated, fill out a request via z.umn.edu/makeituserfriendly form.

• Links from an IT web page to a public article must use the article's Drupal-generated URL, not its TDX link.

• There is a pull limit of 50 public-facing articles per day into Drupal.

- The limit is for any articles that had changes made (including both newly Published articles and articles with any updates or changes).

- The limit is in the pull from the headless Drupal site to the production Drupal site. There is no limit in the pull from TDX to the headless Drupal site.

- The limit is 50 per day and does not roll over to the next day.

  - Example: If you publish/update 60 Published articles in one day, then 50 articles will update in Drupal that night and the extra 10 articles will not update in Drupal. To get those extra articles to pull into Drupal, go into TDX the next day and either un-Publish/re-Publish them or make an edit so they can be part of the 50 for the new day.

- If you are working on a large Knowledge maintenance project and are updating/publishing 50+ public-facing Knowledge Base articles in one day, it is recommended to limit those updates to 40 public-facing articles per day. This leaves 10 extra slots in the knowledge pull for any general operational KB article updates.

Note: If you don't see a TDX ID number at the bottom of an Technology Help web page, the page was created in Drupal, not TDX.

All Knowledge Base articles are **How-To** articles on the Technology Help website (it.umn.edu).

Chapter 4. Create and edit content

These nested topics are for users who create or edit content on the Technology Help website.

Create a Service Page

Create and publish a service page.

1. Sign in to the [Drupal website](#)
2. In the top menu, hover over **Content** then **Add content** then **Service**
3. Fill in the content
4. Add a note to the **Revision log** message on the right side of the page
   - Briefly describe what you did to the page
5. To publish the page, check the box next to **Published** and **Save**
   - To save the page as a draft to publish later, leave the box unchecked and **Save**

Create a News Article

How to create a news article

1. Sign in to the [Drupal website](#)
2. In the top menu, hover over **Content** then **Add content** then **News**
3. Confirm that in the **Site Section** drop-down menu, **News** is selected
4. Confirm **Published Date** is correct

   If you are updating an article, use the **Updated Date** field
5. Fill in the content below
6. Add a note to the **Revision log** message on the right side of the page

   Briefly describe what you did to the page
7. Select **Promotion Options** on the right side of the page
8. Check the box next to **Promoted to front page** to ensure the article appears on the home page of the Tech Help website
9. To publish the article, check the box next to **Published** and **Save**

   To save the article as a draft to publish later, leave the box unchecked and **Save**

Roles and editing permissions

Lists of editing permissions by different role types.

Content Editor

Editing permissions
Create and edit media
Create and edit any pages you have access to
Add a revision log entry
View revisions
Revert to a previous revision

> ✎ **Note:**
>
> This role will not be able to publish new pages. They can only save them as drafts. They will need to have someone with the Page Publisher role review and publish their pages.

Page Publisher

Editing permissions
Publish and unpublish any pages you have access to
Create URL redirects and aliases

Advanced Editor

Editing permissions
Create, edit and publish pages using the specialized content types (except Knowledge Base Article)
Configure layout overrides
Create and edit single-use custom blocks
Create and edit taxonomy terms

Platform Configuration and Coding Permissions

Editing permissions
Administer content types
Configure any layout

Editing permissions
Configure all layout overrides
Administer views
Administer blocks
Administer Bulk Update Fields
Administer URL aliases
Administer vocabularies and terms
Define the existing Paragraph types and their fields and behaviors
Administer media & media types
Administer meta tags
Administer Easy Breadcrumb settings
Administer Google Analytics and Google Tag Manager
Administer Honeypot
Administer Rabbit Hole settings for Content & Taxonomy terms
Administer robots.txt
Administer facets for search pages

Platform Provisioning Permissions

Editing permissions
Add and remove access to platforms
Assign roles

Platform Administrator Permissions

Editing permissions
Full access to everything