

KB User Group Meeting

Guiding Users to Your Content

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01 | HOMEPAGE 02 | SEARCHING

03 | CONTENT 04 | DATA AND FEEDBACK



Homepage



Homepage





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Homepage





Homepage





Homepage



Content modules

Top Documents

- 1. KB User Group Meeting
- 2. > 2021 KnowledgeBase (KB) User Group Meeting
- 3. About the KnowledgeBase
- 4. KB User's Guide Documents Tab ImportHTML button
- 5. Sample Doc: IncludeDoc Violin Parts



Documents Recently Updated

- 1. KB User Group Meeting
- 2. > 2021 KnowledgeBase (KB) User Group Meeting
- 3. KB User's Guide Documents Tab Import & Export
- 4. KB User's Guide Stats Tab Doc Events
- 5. KB User's Guide Stats Tab Overview of Links
- 6. KB User's Guide UW Theme for KB: Features
- 7. KB User's Guide SitePref Tab Side Modules and Side Module Links
- 8. KB User's Guide General Admin and Author Training Recordings [Campus login required]

MORE RECENT DOCS RECE

CS RECENT DOCS RSS

~

Content modules

Customize in SitePref tab to display list of documents or contents of an entire page

KB Basics - Start here!

- 1. KB Author Training Overview
- 2. KB Author Training Creating a New Document
- 3. KB Author Training Attachments and Revisions
- 4. My KB Group Space: A First Look





The 2021 KB User Group Meeting: July 26th-30th, 2021

Every year the KnowledgeBase team and the user community come together with industry experts to share experiences, lessons learned, and best practices. This years collaborative events will take place the week of July 26th-30th, 2021. Our virtual events and "live presentations" will be hosted using Zoom. We may also feature some pre-recorded videos and other resources.

Learn more and join a session





Topics

- Organize based on user needs
- Can easily link to groups of documents







Topics

- Organize based on user needs
- Can easily link to groups of documents







Side Modules

					ASK US A QUESTION			
KB User's Guide	Search the KB	All Topics V SEARCH Adva	nced Site Maj	p Search Tip				
Favorites ^ Show "My Favorite" KB User Guide Documents Admin Tabs ^ Home Documents Topics News SitePref Users	2021 KnowledgeBase (KB) User Group Meeting Every year the KnowledgeBase team and the user community come together with industry experts to share experiences, lessons learned, and best practices. This years collaborative events will take place the week of July 26th-30th, 2021. Our virtual events and "live presentations" will be hosted using Zoom. We may also feature some pre-recorded videos and other resources. Agenda Throughout the event, we will continue to update this page.							
Stats	Time	Session Name and Description	Length	Presenter(s)				
Document Workflow Audiences ^ Faculty Staff	9:00 a.m. to 9:45 a.m. CST	Welcome to the 2021 KnowledgeBase (KB) User Group Meeting The KB team will provide a quick overview of the events for this week, how to join them, and methods for connecting with others in the KB user community. Live presentation with Q&A session. Session 1 recording and resources coming soon	45 mins	The KB team				
	10:00 a.m. to 11:00 a.m.	Understanding the KB Feature Request Process	60 mins	Laura Grady and the KB				



HTML Primer	11:15 CST
Helpful KB Tips 🥎	
User's Guide Keyword Index	
LifeCycle of your KB Document	
WYSIWYG Editor Controls	
HTML Editor Quick Code Buttons	
	12:00
	CST
KB Trello Boards 🔷	1:00
Known Issues	CST

Side - Side Modules

- Resource reminders
- Multiple contacts
- Intake forms
- Service login links

Module: Helpful KB Tips								
Module:		Link name:	Link URL:	Internal	External	Popup	Order:	
Helpful KB Tips	~	User's Guide Keyword Inde>	keywords.php				1	Delete
Module:		Link name:	Link URL <u>*</u> :	Internal	External	Popup	Order:	
Helpful KB Tips	~	LifeCycle of your KB Docum	page.php?id=8531				2	Delete
Module:		Link name_:	Link URL::	Internal	External	Popup	Order:	
Helpful KB Tips	~	WYSIWYG Editor Controls	page.php?id=23433				3	Delete
Module:		Link name <u>.</u> :	Link URL::	Internal	External	Popup	Order:	
Helpful KB Tips	~	HTML Editor Quick Code Bu	page.php?id=23534				4	Delete
Module:		Link name <u>*</u> :	Link URL:	Internal	External	Popup	Order:	
Helpful KB Tips	~	Add Google Analytics to you	page.php?id=5787#toc4				5	Delete



Top Modules and Link Bar

Contained within Side Modules

- Navigation and guidance
- Topics or single overview documents
- Primary contact or login link

UNIVERSITY OF WISCONSIN KNOWLEDGEBASE	DOIT UW MYUW
SHARED TOOLS Search the KB All Topics V SEARCH Advanced	
KnowledgeBase	
JIRA SUPPORT CONFLUENCE WIKI SUPPORT GIT	
ACCESS SHARED TOOLS A NEWS AND ANNOUNCEMENTS	•
DOIT JIRA (PRODUCTION) »	



Topic Headers

Show relevant topic filters »

Users Tab :: ADMIN TOOLS TAB - Users

The Users tab allows you to add or edit KB Admin Tools users for your group. In addition to logins and passwords, different access privileges may be granted to users depending on the roles they play in maintaining your KnowledgeBase.

■ With the correct permissions, you may:

- Add a User
- Modify and Delete Users
- <u>Change the Default Groups Space</u>
- View User's Group Membership(s)
- <u>Transfer Document Ownership</u>

Keyw	Keywords V Results: 1-12 of 12							
No.	Document Title	ID	<u>Updated</u>	Hits				
1	*** KB User's Guide - Explanation of User Types and Access Levels	36826	2021-06-01	15916				
2	KB User's Guide - Users Tab - Group Authorization	22116	2021-06-17	16740				
3	KB User's Guide - Using Manifest to Authorize Users for the KB	110558	2021-06-15	636				
4	KB User's Guide - Users Tab - Search and Display Filters on the Existing Users Screen	127	2021-06-01	14516				
5	KB User's Guide - Users Tab - Transfer News Ownership Button	15192	2021-06-01	14528				
6	KB User's Guide - Users Tab - Batch Transfer Document Ownership	15193	2021-06-01	16321				
7	KB User's Guide - Users Tab - Adding a User	5338	2021-06-01	27617				
8	KB User's Guide - Users Tab - Remove User from This Group	15205	2021-06-01	13957				
9	KB User's Guide - Users Tab - User Access Groups and Limited Access Groups	6691	2021-06-01	22827				
10	KB User's Guide - Users Tab - Remove User from the System	15207	2021-06-01	14025				



Shared Tools KB "JIRA" Topic

GUIDING USERS TO YOUR CONTENT / HOMEPAGE





Topic Headers

- Popular searches
- Frequent requests

Learn more on Thursday afternoon:

- · Side modules
- Topics and headers
- Overview documents



Searching

Keywords



Should include different ways that someone

might describe what they're searching for:

"Anchor link" \rightarrow "anchor tag" \rightarrow "jump link"

Title.*:	KB Author Training - Creating a New Document
Keywords,: Edit Insert	new document create write doc new make doc make make new document article KB article write KB article write KB doc write doc make
	KB doc KB document document editor kbadmin kb







Noise Words

The following noise words are ignored in KB searches.

a, about, after, ago, all, along, also, am, an, and, any, are, as, at, bad, be, been, before, being, but, by, can, could, did, do, does, either, else, even, ever, far, for, from, , , , get, getting, go, going, gone, got, had, has, have, having, her, here, hers, him, his, how, i, if, in, into, is, it, its, less, more, must, never, , no, none, nothing, of, off, often, old, on, once, only, or, other, our, ours, over, please, rather, she, should, so, some, something, , sometime, sometimes, than, that, the, their, theirs, them, then, there, these, they, this, though, thus, to, too, until, up, upon, very, was, were, what, when, where, which, who, whom, why, will, with, would, yes, yet, you, yours

"how to update your preferred name"



Noise Words

The following noise words are ignored in KB searches.

a, about, after, ago, all, along, also, am, an, and, any, are, as, at, bad, be, been, before, being, but, by, can, could, did, do, does, either, else, even, ever, far, for, from, , , , get, getting, go, going, gone, got, had, has, have, having, her, here, hers, him, his, how, i, if, in, into, is, it, its, less, more, must, never, , no, none, nothing, of, off, often, old, on, once, only, or, other, our, ours, over, please, rather, she, should, so, some, something, , sometime, sometimes, than, that, the, their, theirs, them, then, there, these, they, this, though, thus to, too, until, up, upon, very, was, were, what, when, where, which, who, whom, why, will, with, would, yes, yet, you, your, yours

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The following noise words are ignored in KB searches.

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"how to update your preferred name"

No.	
76	e-commerce, ecommerce
77	edit, edits, edited, editing, editor, editors
78	egrade, egrades, egrading, e-grade, e-grades, e-grading
79	electronic, electronical, electronically
80	eligible, eligibles, eligibility
81	email, e-mail, e-mails, emailed, e-mailing, emailing, mail, mails
82	enable, enables, enabled, enabler, enablers, enabling
83	encrypt, encrypts, encrypted, encrypting, encryption, encryptions
84	enroll, enrolls, enrolled, enrolling, enrollment, enrollments
85	entry, entries
86	equate, equates, equated, equation, equations
87	equate, equates, equated, equation, equations
88	erase, erases, erased, erasing
89	escalate, escalates, escalated, escalating, escalation, escalations
90	escape, escapes, escaped, escaping
91	establish, establishes, established, establishing, establishment, establishments
92	evaluate, evaluates, evaluated, evaluating, evaluation, evaluations
93	execute, executes, executed, executing, execution, executions, executable, executables
94	exercise, exercises, exercised, exercising
95	expand, expands, expanded, expanding, expansion
96	expire, expires, expired, expiring, expiration, expirations
97	explain, explains, explained, explaining, explanation, explanations
98	extend, extended, extending, extender, extenders
99	extension, extensions, extention, extentions
100	fail, fails, failed, failing, failure, failures

- "copy document"
- "duplicate document"

"upgrade website" "web site upgrades"

Learn more on Thursday morning:

- Analyze Search Log data
- Failed Searches
- Overview documents





Search Priority

Bring key documents to the top of

search result lists

- Intended for new users
- Frequent internal procedures







Title Schemes

"Product Name (Restrictions) - Descriptive Title"

Topics Map > JIRA

JIRA - Roles

Project Leads and Administrators (Admins) will be guided through the steps of adding users to their Highlight search terms Projects by means of the Project Roles function. This way, if a user needs to be added to a specific role, Jira Admins will not need to intervene, everything can be handled internally by Project Staff.

• Project Admins May Assign User to a Role

Ask the employee who is brand new to JIRA to first complete the steps in this document, <u>DoIT Shared Tools - JIRA - New</u> <u>User Self-Enrollment and Access</u>. When that person notifies you that this step is complete, the Project Admin will be able to add the newly added user to their JIRA project.

Questions from Chat



Q: Do topics or their descriptions appear in search results?

A: The search does not currently look at Topics or descriptions, but is under consideration as we improve our search functionality.

Q: A group's documents are titled as numbers (e.g. "782"), but when they search for them, nothing comes up. Why not?

A: When you search for a specific number, it will bring up the document with that ID. Searching "782" will bring you to document 782. If you don't have access to it, you'll get an access error. If you add a specific title or keywords, you could find the doc by searching for either of those.

Q: If a group wants to re-build their Topics tree, is that a manual process?

A: You can use the Batch Topic Assignment tool to change multiple documents at a time and avoid updating them all individually.



Content



KB User's Guide - Documents Tab - Use and Request Buttons for Document Sharing

This document will discuss how to use the features found in the **Use Documents from Other Groups** screen. Documents include all external documents from other sites as well as the internal

Highlight search terms

documents owned by groups for which you have internal KB access. Viewing and/or using existing documentation can be an informative reference when creating brand new documents and especially for new KB sites looking for relevant content to adopt.

- Use Documents from Other Groups
- The Use Button: Access to Documents Shared by other KB Groups
- The Request Button: Submitting a Request to Share a KB document
- Document Owner Receives Request
- <u>What You Can Edit</u>

Use Documents from Other Groups

To access the **Use Documents from Other Groups** page, go to the Documents tab and click on the **Use Docs from...** link at the very top of the left navigation bar.



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F-Shaped Reading Pattern



Eyetracking by Nielsen Norman Group nngroup.com NN/g

Summary & TOC

- Overview
- Preface or restricting information

KB User's Guide - Documents Tab - Use and Request Buttons for Document Sharing

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Summary & TOC

- Overview
- Preface or restricting information

- Convenient
- Can see keywords without scrolling

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This document will discuss how to use the features found in the Use Documents from Other Highlight search terms Groups screen. Documents include all external documents from other sites as well as the internal documents owned by groups for which you have internal KB access. Viewing and/or using existing documentation can be an informative reference when creating brand new documents and especially for new KB sites looking for relevant content to adopt.

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image below shows the filters you may use to parrow your search

Screenshots

Allow users to visually confirm they're on an appropriate document





Log Into MyUW System

MyUW System can be accessed at <u>my.wisconsin.edu</u> using <u>Wisconsin Federation</u> login.

First, select your University of Wisconsin System organization.



Next, you will be taken to the login page for your campus. Log in using your campus credentials (e.g. NetID, UW-Extension ID, ePanther ID, etc.).

For more details or assistance with UW System campus credentials, please see <u>UW System - Login credentials for each campus</u> or <u>contact your campus IT Help Desk</u>.

Screenshots

Allow users to visually confirm they're on an appropriate document

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References

Link to other documents in context

"See Also" documents

For more details or assistance with UW System campus credentials, please see <u>UW System - Login credentials for each</u> <u>campus</u> or <u>contact your campus IT Help Desk</u>.

Once logged in, your MyUW Homepage will display a variety of widgets based on your role at the university. The list of default widgets can be viewed at <u>MyUW System Portal - Default Widgets on Homepage</u>. For assistance with searching for more MyUW widgets and applications, please see <u>MyUW System Portal - Navigating and Searching in MyUW</u>.



See Also:

- <u>MyUW System Portal Service Description</u>
- <u>MyUW System Portal Navigating and Searching in MyUW</u>

References

- Link to other documents in context
- "See Also" documents

- Help Desk contacts
- Internal contacts

For more details or assistance with UW System campus credentials, please see <u>UW System - Login credentials for each</u> campus or contact your campus IT Help Desk.

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≡ MyUW	Search for apps by keyword	٩		0 A 🖲
HR, Payroll and Benefits to News Birk Unasi Vacation for Folian to New Har Hof Payroll Standard Ange Revealer Hetholde You Two Off - Use Yea Me Year Danges Healtone FAL and Dgen (Busing 4 of 50	Time and Absence I	Payroll Information 1 Canneys Statements Tax Statements Tax Statements Deposit Update Wet Update Wet	Benefit Information I Learn more	
See all	Launch full app	Launch app	Launch full app	
Manager Time and I Approval Not a manager Out help	Benefits and Payroll 1 Resources	Personal Information	Mandatory Training 1	
See all approval options	Launch full app	Launch full app	View help resources	
UW System Career	Help with MyUW System I	Well-Being Resources 1	My Bookmarks I	





Group: WiscWeb CMS

Content Owners

- Links to site
- Identifies service owner
- Feedback

Data and Feedback

Title	ID	Created	Updated	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yes	No	Diff	Reset
KB User's Guide - Advanced HTML - Decision Tree	66704	2016- 09-06	2021- 06-01	1 0	0 0	2 1	0 0	0 0	1 0	0 0	_1_	_1_	_1_	_ _	_1_	4	1	+3	This year All years
KB User's Guide - Advanced HTML - Creating Collapsing and Expanding Panels	73277	2017- 05-12	2021- 06-01	1 0	0 0	0 0	0 0	0 0	1 0	0 0	_1_	_ _	_ _	_ _	_ _	2	0	+2	This year All years
KB User's Guide - Documents Tab - Uploading Images and Other Attachments	5722	2007- 04-10	2021- 06-01	1 0	0 0	0 0	0 0	0 0	0 0	0 0	_ _	_ _	_ _	_ _	_ _	1	0	+1	This year All years
KB User's Guide - Documents Tab - Document Style Guidelines	5304	2007- 01-18	2021- 06-01	0 0	0 0	1 0	0 0	0 0	0 0	0 0	-1-	-1-	_1_	_ _	_1_	1	0	+1	This year All years
KB User's Guide - Documents Tab - The "Save As" Button	5975	2007- 06-06	2021- 06-01	1 1	0 0	0 <mark>0</mark>	0 0	0 0	0 0	0 0	_1_	_ _	_ _	_ _	_1_	1	1	0	This year All years
KB User Group Meeting	111695	2021- 06-15	2021- 07-26	0 0	0 0	0 0	0 0	0 0	0 0	1 1	- ! -	_ _	_ _	_1_	_ _	1	1	0	This year All years
KB User's Guide - Documents Tab - Overview of Fields in Document editor	5238	2007- 01-03	2021- 06-19	0 <mark>0</mark>	0 0	0 0	0 0	0 0	0 0	1 1	_ _	_ _	_ _	_ _	_ _	1	1	0	This year All years
KB User's Guide - General Info - Username and Password Help	68617	2016- 11-10	2021- 06-01	0 1	0 1	2 2	4 1	0 1	1 0	0 1	-1-	_!_	_1_	_ _	_ _	7	7	0	This year All years
KB User's Guide - Documents Tab - Status	5234	2007- 01-02	2021- 06-01	0 0	0 0	0 0	0 0	0 0	0 0	1 1	_1_	_1_	_1_	_1_	_1_	1	1	0	This year All years
KB User's Guide - SitePref Tab - CSS for Full View	12075	2009- 09-01	2021- 06-19	0 0	0 0	0 1	0 0	0 0	0 0	0 0	-1-	_1_	-1-	_1_	_1_	0	1	-1	This year All years

Helpfulness

- Hit or miss
- Identify frustrations

Former Employees - Accessing Earning, Leave, Tax, and Benefit Statements

This document explains how former employees (faculty, staff, and student) can obtain copies of their earning, tax and benefit statements. When affiliation with the University of Wisconsin ends, employees lose access to HRS. This will prevent former employees from accessing their tax and earnings statements electronically. Former employees will also not be able to update their address information.

Why am I losing access?

Your affiliation with the university determines your access to many campus services. When your Human Resources department updates your affiliation status to indicate that your employment has been terminated, you will no longer be able to access your employee information in HRS.

If you believe you have lost access or been directed to this page in error, please contact your Human Resources to confirm your employment status has been correctly entered. If further assistance is needed after consulting with your HR representative, please contact <u>help@doit.wisc.edu</u>.



Helpfulness

- Hit or miss
- Identify frustrations
- Feedback on processes



Page Views

- Influenced by bots
- Find patterns
- Inform Topics and
 - presentation of information



No.	Month	InternalViews	ExternalViews	CombinedViews
1	2020-07	133,124	4,271,129	4,404,253
2	2020-08	161,882	4,700,245	4,862,127
3	2020-09	176,401	4,831,115	5,007,516
4	2020-10	154,268	4,623,074	4,777,342
5	2020-11	133,005	3,851,202	3,984,207
6	2020-12	162,969	3,676,148	3,839,117
7	2021-01	162,436	4,073,556	4,235,992





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Search Data

- Expand keywords
- Find how users look for content
- Identify missing subjects to document

No.	Search Term	Topic	Site	Matches	Search Mode
1	hi kb user group meeting!		ext	0	KWS
2	hi kb user group meeting!		ext	0	KWS
3	use request		ext	7	KWS
4	use request		ext	7	KWS
5	knowledgebase		ext	255	KWS
6	knowledgebase		ext	255	KWS
7	human-readable		ext	1	KWS
8	human-readable		ext	1	KWS

Analysis

- Remove bot traffic
- Along with feedback, patterns and trends show how the site is doing
- Use data and consistent practices to work towards user-oriented space

		86	hi
		87	hig
72	helpfulness	88	hig
73	knowledgebase	80	bid
74	helpfulness	09	1 mg
75	knowledgebase	90	hi
76	helpfulness	91	hig
77	knowledgebase	92	hi
78	helpfulness	93	hig
79	knowledgebase	04	bid
80	helpfulness	34	TH ₁
81	knowledgebase	95	hig
82	helpfulness	96	hig
83	knowledgebase		
84	helpfulness		
85	knowledgebase		
86	helpfulness		

83	highlightOR x=y
84	highlightOR x=x
85	highlightOR 1=0
86	highlightOR 1=1
87	highlight-true
88	highlight-false
89	highlightAND false
90	highlightAND true
91	highlightAND 0
92	highlightAND 1
93	highlight OR x = x
94	highlight OR 1=1
95	highlight =
96	highlight" OR "" = "



Past Recordings



Monday	How to Measure Your KB's Success	Maya Knotts and Dana Gerber-Margie	Reviewing analytics projects to determine effectiveness of self-service support
Tuesday	Predicting Time-Bound User Needs Using Google Analytics Data	Jonathan Dedering	Consolidate and review Google Analytics data to guide content strategy

Upcoming Sessions

Wednesday	Using your KB Data to Deliver Better Experiences	Kedar Joyner	Export and use strategically use KB Admin Page View and Search Log data
	Creating Accessible Content	Kurt Muckstadt	Communicate about and prioritize accessibility in content creation
Thursday	Failed Searches Analysis	Noah Fairchild and Dana Gerber-Margie	Analysis of failed search results in DoIT Help Desk KnowledgeBase
	KB Overview Documents	Andrew Mueller	Strategically use panels, modules, and Topic descriptions (with examples!)
Friday	Takeaways and Templates	Dana Gerber-Margie	Sharing lessons and review template, 47 document checklist, and style guide



KB User Group Meeting

Open Q&A



What questions or ideas would you like to discuss? Please Raise Hand and Unmute or send in the chat.

Elisabeth Trenta

July 27, 2021

WPS Technical Writer

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Q: How do you add in the Table of Contents?

A: In the KB User's Guide, <u>Document 22302</u> has all of the instructions and HTML/JS to paste into the appropriate fields within the KB Admin. The TOC code will display all of your h2 and h3 headers at the top of the document. You also edit the JS code to pull more or less headers depending on your formatting. Just keep in mind that the Preview may not display the TOC as intended, so you may need to activate the document to see how it will actually look.

Q: How do Topics work across KB spaces?

A: Documents shared into your space by another group can be organized into your space's Topics like any other document.



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Thank You!

Elisabeth Trenta

July 27, 2021

WPS Technical Writer