



Knowledge Base: Overview

Topics covered:

- [1. Creating categories and permissions](#)
- [2. Creating an article](#)
- [3. Asking questions and responding](#)

1. Creating categories

Categories are ways to group articles together. It is best practice to decide on a category structure early on to make it easier for users to find relevant articles and sub-categories that can be added as needed.

Within each category, you can have both articles and questions which can be answered by category experts.

To set up categories, head to **Admin > Knowledge base** where you will land on categories.

[Admin](#) / [Knowledge Base](#) / [Categories](#)

	Category Name ▲	Articles	Questions
Categories	Demo Processes	21	1
Articles	General	4	1
Questions	Human Resource	-	-
	Infocapture	8	2
	Intranet Advice	8	-
	Professional Services	2	1
	Uncategorised	-	-

When creating a new category, you'll see various options as follows:

Admin / Knowledge Base / Categories / Add Category

Add Category

Parent Category: - no parent-

Category name:

Description:

Permissions:

View
 Create an Article
 Publish an Article
 Edit all Articles
 Delete all Articles
 Ask a Question
 Edit all Questions
 Delete all Questions
[View effective permissions...](#)

Category Expert:

Experts can Endorse articles - this displays an endorsement on the article view

Only allow Category Experts to respond to questions

- **Parent Category:** This allows sub-categories to be created (this will be covered in the next section)
- **Category name:** The title of the category
- **Description (Optional):** This allows a category template to be created, which will appear ahead of article results when filtering by category label (in the video above, we added an image header into this field).
- **Permissions:** Users/roles/groups can be defined here to give rights to see or interact with content, such as Questions (which will be covered later in this course).
- **Category expert:** Within this category, the users defined in this field can answer questions and endorse articles.
- **Only allow....:** When enabled, this option means only category experts can answer questions submitted in this category (rather than anyone with permission to do so).

Permissions

An approval process can be set up in Knowledge Base. Any user/role/group defined can be set to match the following:

- Only create draft content, submitted to others to publish (i.e. users not permitted to make content live).

Permissions

All registered
 Role: Administrators
 User: Abigail Clark

View
 Create an Article
 Publish an Article
 Edit all Articles
 Delete all Articles
 Ask a Question
 Edit all Questions
 Delete all Questions
[View effective permissions...](#)

Knowledge Base / Add Article

Language English [options](#)

Article Title *

Category Demo Processes x v

You don't have permission to publish to this category: Once you update this article the status will change to DRAFT

Tags

popular tags: intranet, claromentis, microsoft, excel, social

Author Abigail Clark x v [Browse](#)

- Be able to create their own personal drafts and publish these (i.e. users trusted to post content).

Permissions [Browse](#) [Remove](#)

All registered
Role: Administrators
 User: Abigail Clark

View
 Create an Article
 Publish an Article
 Edit all Articles
 Delete all Articles
 Ask a Question
 Edit all Questions
 Delete all Questions

[View effective permissions...](#)

Status Draft Publish Archive

[Add Article](#) [Cancel](#)

- Be able to create their own personal drafts, publish own content, and view/publish the drafts submitted for approval by those with only 'Create Draft' rights (i.e. users with the highest level of editing and publishing ability as well as responsibility).

Permissions [Browse](#) [Remove](#)

All registered
Role: Administrators
 User: Abigail Clark

View
 Create an Article
 Publish an Article
 Edit all Articles
 Delete all Articles
 Ask a Question
 Edit all Questions
 Delete all Questions

[View effective permissions...](#)

Please note: Submitted drafts by other users will appear in the application landing area or in a specific category they were posted in for users to edit and publish when ready.

The screenshot shows the Knowledge Base interface with a list of articles on the left and a 'Draft Articles' section on the right. A red arrow points to the '+' icon in the top right corner of the interface.

Articles:

- How to use Discuss to boost collaboration in your teams**
Collaborate from afar Sometimes the best collaborative moments happen spontaneously by the coffee machine, but given this isn't possible right now, you need to get a little creative in how you engineer these en...
Last modified on 7 September 2021 in *Intranet Advice*
- How to do remote performance reviews using your intranet**
Annual performance reviews have been slowly falling out of favour, with just 54% of companies using them in 2019 according to one study. And as we adapt to new ways of working, now might be the time to retire t...
Last modified on 7 September 2021 in *Intranet Advice*
- 3 ways to use your intranet as a remote onboarding tool**
Just like your intranet connects your existing teams to each other, it can help you create an onboarding experience for your new staff too. Here are 3 ways to use your intranet to onboard new hires remotely. Cr...
Last modified on 25 August 2021 in *Intranet Advice*
- Content Management Guidelines**
Intranets don't serve the typical content marketing goals of corporate websites, that is, to gain new leads and provide potential prospects with business information. Intranets exist to serve your employees and...
0 comments • Last modified on 7 September 2021 in *Intranet Advice*
- Bug Tracker**
Summary A major component of a bug tracking system is the database it creates, containing facts about known bugs. Facts include reproducibility, severity and priority, a summary of the bug and details on how to...
0 comments • Last modified on 7 September 2021 in *Demo Processes*
- Employee Of The Month**
Summary This is a simple form, whereby users are able to nominate a colleague for an achievement or outstanding performance during the month. Nominations will not be visible to non-managerial staff. Permissions...
0 comments • Last modified on 7 September 2021 in *Demo Processes*

Draft Articles:

- Test article 23
22 February 2022
- How to add a new file
8 February 2022

2. Creating an article

Once you have relevant permissions within at least one category, you will be able to create a new article by clicking on the '+' icon that will appear at the front-end of the Knowledgebase application.

Information about article creation is detailed in its own guide [here](#).

The screenshot shows the Knowledge Base interface with a list of articles on the left and a 'Bug Tracker' and 'Employee Of The Month' article on the right. A red box highlights the '+' icon in the top right corner of the interface.

Articles:

- Bug Tracker**
Summary A major component of a bug tracking system is the database it creates, containing facts about known bugs. Facts include reproducibility, severity and priority, a summary of the bug and details on how to...
0 comments • Last modified on 18 February 2019 in *Demo Processes*
- Employee Of The Month**
Summary This is a simple form, whereby users are able to nominate a colleague for an achievement or outstanding performance during the month. Nominations will not be visible to non-managerial staff. Permissions...
0 comments • Last modified on 18 February 2019 in *Demo Processes*

3. Asking questions and responding

Questions can be utilised in Knowledge Base as an FAQ type section. This can help other users find answers that might not be covered in the articles themselves.

Questions can be set up so any other users can answer them or only category-specific users can answer if only particular users have knowledge on a subject known as a 'Category Expert'.

The screenshot shows a Knowledge Base interface. At the top left, it says "Knowledge Base". To the right of this are several icons: a green plus sign, a red speech bubble icon (highlighted with a red box), a document icon, a speech bubble icon, a list icon, and a close icon. Below the header, there are tabs for "Articles" and "Questions", and a "Subscriptions" button. The main content area displays three articles: "Bug Tracker", "Employee Of The Month", and "Exit Interview". Each article has a summary and a "0 comments" indicator. On the right side, there is a search bar labeled "Search Knowledge Base" with a search icon and an "Advanced search" link. Below the search bar is a "Recent questions" section with three entries, each showing a user profile picture, the question text, and the date.

You are able to enable or disable comments completely from the admin side of Knowledge Base, if needed.

More information about Questions is detailed in its own article [here](#)

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