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**
Demo Processes	21	1
General	4	1
Human Resource	-	-
Infocapture	8	2
Intranet Advice	8	-
Professional Services	2	1
Uncategorised	-	-

Sidebar: Categories, Articles, Questions

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

Categories

Articles

Questions

Add Category

Parent Category - no parent-

Category name

Description

Source | B I U S x₂ x² Iₓ

Styles | Format | Font | Font Size

Permissions Start typing to add... Browse Remove

☐ 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 Browse

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

☐ Only allow Category Experts to respond to questions

Add Category Cancel

- **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 Start typing to add... 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...

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

- 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).
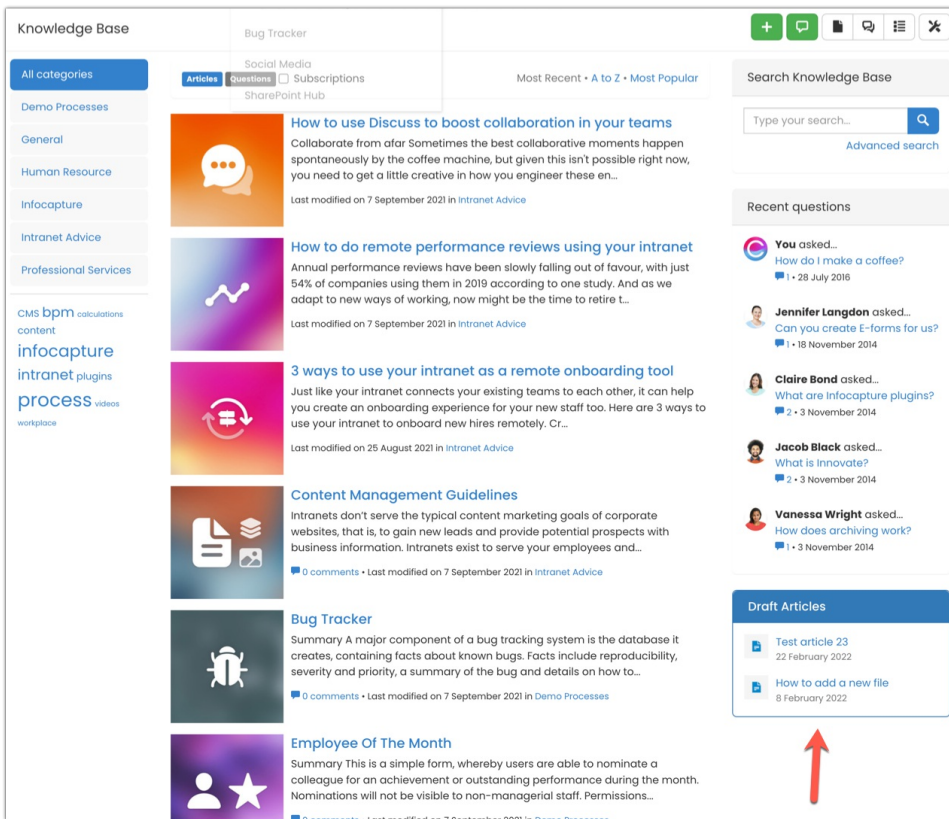

Please note: Submitted drafts by other users will appear in the application landing area or in a specific category they were posted in for users to edit and publish when ready.

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.
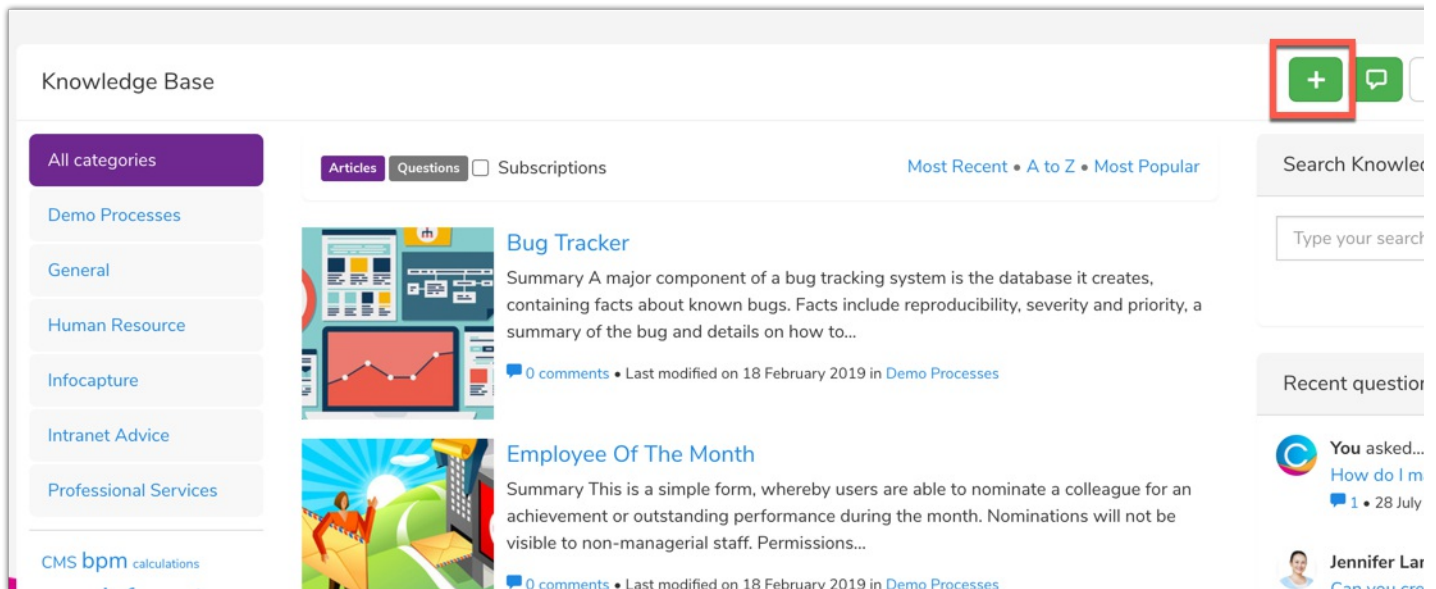
3. Asking questions and responding

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'.

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

---