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| No. IT- 037  | Policy Name: Manage Engine Knowledge Base Item Procedure  |
| Effective Date: 7-1-2011<br>Last Revised Date: 6-26-2014 | Citywide Policy _<br>IT Policy _<br>IT Procedure <u>X</u> |
| Approved By: IT Director                                 |   |

**Background:** The IT department utilizes a help desk system that has a knowledge base feature. The knowledge base allows users and IT staff to search for information and resolutions to problems to reduce the amount of manual IT staff time looking up information. The IT department wants to make the system quick and easy for users to find information so guidelines are here to ensure appropriate information is included or excluded from the system. Technicians should use common sense when deciding when to add an item and how to present the item.

**Items for Inclusion in the Knowledge Base:** The following types of information should be included in the knowledge base. Information that has a wide audience (department, application or enterprise level) and where IT has experienced several inquiries on the topic are generally good topics for the knowledge base.

1. Policies
2. Procedures
3. Service Descriptions
4. inks to training videos
5. User guides on applications and services
6. Frequently Asked Questions by Customers – if your team gets several calls or tickets on the same topic over a period of time then these should be included in the knowledge base
7. Other – Information deemed appropriate by department managers based on these guidelines
8. Resolutions to frequent problems or issues that have been verified by IT or approved as a standard solution by IT management
9. System use
10. System features and functionality
11. Resolutions to frequent problems

**Items to be excluded from the Knowledge Base:** The following types of information should not be included in the knowledge base. Information specific to a user, non-standard applications, non-standard equipment, unsupported systems or other unique and infrequent information should generally not be included in the knowledge base.

1. Project Information or Project Activities
2. Unverified information or unverified technical resolutions
3. Single user specific questions or problems
4. Temporary services or activities

**Creating the Knowledge Base items:** Knowledge base items can be created as a standalone entry or copied from a ticket. Users should make every effort to adhere to the following when creating a knowledge base item:

1. Complete sentences so anyone can understand the issue and answer.
2. Proper grammar and spell check should be used. Informal conversational writing styles should be avoided or edited to more standard sentence structures.
3. Individual names or individual identifiable information should never be displayed in knowledge base items either for technicians or the general customer base.
4. The use of sarcasm, jokes, celebrity references, religious references, political references or other non-standard language should be avoided in Knowledge Base items.
5. Titles should always be used and accurately describe the item.
6. Tags- The first 500 words of the item are searchable. Users should use additional tags to make it easy and intuitive for users to find the item if these words are not located in the body of the document. Tags will always be used for items that only have a links, videos, picture or other non-text items in the body or the item.
7. Categories – Users will choose the most appropriate category for the item. The use of “General” should be used sparingly to avoid this becoming too large and cumbersome. If a new category is needed, contact your manager and the item will be reviewed for appropriateness.
8. Customer Content – The system allows items to be viewed by the general customer community or technicians only.

Content that should **never** be displayed to the customers include the following:

Information pertaining to network configurations, system configurations, IT internal operations, network diagrams, application code, IP addresses, or other secure and confidential IT information should never be displayed to the end user community.

Software not supported by IT

Hardware not supported by IT

Services not supported by IT

Applications and databases not supported by IT

Exception procedures or workarounds to standard services

Exceptions to security processes, procedures or products

Temporary services or activities

Customer content should be confined to items that will assist the customer with self service

**Control and Maintenance:** This policy will be reviewed and updated on an as needed basis.