

# Salesforce Knowledge Base KCS I Candidate

Enterprise Knowledge Management Series

## Additional Notes & Questions

eDeveloper note –  
Screenshots  
throughout the  
presentation are  
smaller for flow and  
visual representation.  
If you select an  
image and click  
**Reset Image and  
Size**, then the image  
will be big enough for  
your use. Please  
contact Jennifer  
Springer if any  
screenshots need to  
be redone. Thanks!  
Jenn



This course will demonstrate the responsibilities of a KCS I Candidate role in the Salesforce knowledge base.

Upon completion of this course, you should be able to

- search Knowledge and Q&A effectively,
- provide feedback to improve the knowledge base,
- post a question to Q&A,
- answer Q&A questions,
- create a new knowledge article, and
- identify compliance risk article topics.

# Table of Contents

**Directions:** Click on any link below to navigate to that lesson. Click the **Prev** button to return to the last page visited. Click the **Home** button to return to this page at any time.

## Lesson Completed

- |                                       |                          |
|---------------------------------------|--------------------------|
| 1. Introduction to SRM knowledge base | <input type="checkbox"/> |
| 2. Use It                             | <input type="checkbox"/> |
| 3. Flag It                            | <input type="checkbox"/> |
| 4. Fix It                             | <input type="checkbox"/> |
| 5. Add It                             | <input type="checkbox"/> |
| 6. Review                             | <input type="checkbox"/> |

## Additional Notes and Questions

*Will not appear in final product.*

The flow of the CBT is linear. The learner will not have the option to view “Flag It” until they have completed “Use It”.



# 1. Introduction

Start Learning Button

# 1. Introduction

- Introduction
- KCS Methodology review
- KCS I Candidate Role review

Apollo Education Group is promoting a knowledge sharing culture by adopting the Knowledge Centered Support (KCS) Methodology; a set of practices and processes for creating and maintaining knowledge as a key asset of the organization.

The purpose of the knowledge base is to provide easy access to knowledge articles, including detailed instructions on processes, procedures, and solutions to make your job easier. Managing the knowledge base takes place in real time by the people who use the knowledge. Each of us are responsible for generating and maintaining the knowledge in an ongoing process. As you use the knowledge base to locate useful articles, you have the opportunity to suggest improvements to existing articles or create a new article to add new knowledge.

Click the different icons to review KCS Methodology basics.  
(see next slide for pop-ups)

**Roles**  
 KCS 0: Reader – Uses knowledge  
 KCS 1: Candidate – Creates knowledge  
 KCS II: Contributor – Validates and styles  
 KCS III: Publisher – Publishes to self-service

**Evolve**

- Content Health
- Process & Integration
- Performance Assessment
- Leadership & Communication

**Solve**

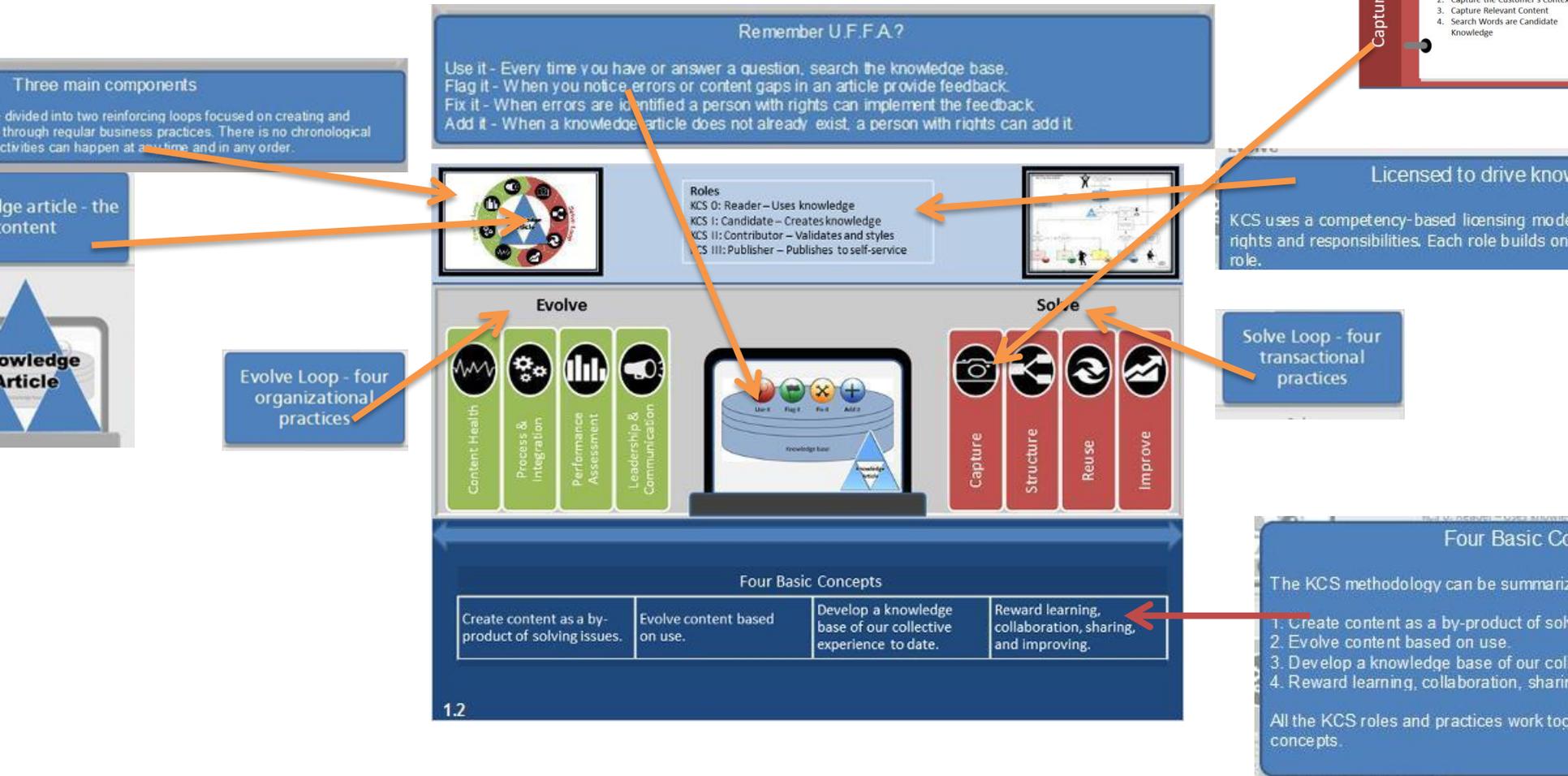
- Capture
- Structure
- Reuse
- Improve

**Four Basic Concepts**

- Create content
- Find content
- Develop a knowledge
- Reward learning

# KCS Methodology Review

[eDev Note: Images/callouts pulled from KCS I CBT. I would also like the books to be clickable to display the practices information. This would be reused as a resource in future KCS CBTs.]



# 1. Introduction

KCS is not something we do in addition to work, KCS becomes the way we work. The primary purpose of this course is to prepare you to perform the role of a KCS I. Before we look at tool specific instructions, let's review the responsibilities and competencies that are expected of the KCS I Candidate role.

Additional Notes & Questions

- Purpose of the knowledge base
- Promote sharing culture
- Maintain accuracy through a
- KCS Met
- KCS I Ca



## KCS I Candidate Responsibilities

- Utilize the knowledge base (KB)
- Submit feedback for article updates
- Create articles when needed
- Promote a knowledge sharing culture
- Follow best practices



## KCS I Candidate Competencies

- Effectively able to search the knowledge base for solutions
- Effectively able to flag articles for updates
- Consistently able to capture the customer's context in the workflow
- Strong documentation skills (thorough, concise, accurate)
- Strong decision-making skills
- Able to perform tasks in various systems

## 2. Use It

Start Learning Button

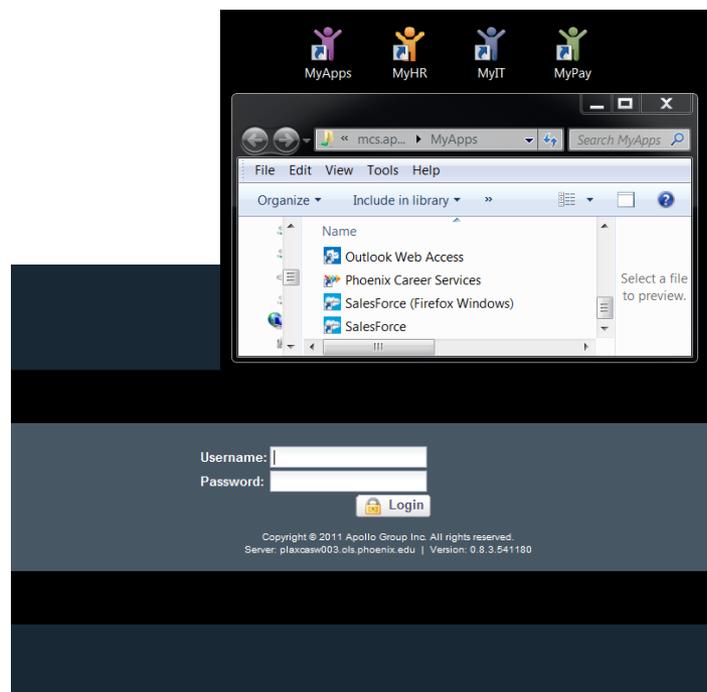
## 2. Use It

- **Log into Salesforce**
- Access the knowledge base
- Use the Knowledge tab
- Filter Search results
- Article Validation Status
- Use knowledge articles
- Search Q&A

Let's take a closer look at how we use the knowledge base with the KCS Methodology.

To access the Salesforce knowledge base:

1. Double-click **MyApps** from your desktop.
2. Select the **SalesForce (Firefox Windows)** link for Single Sign-On
3. Enter your **Username** (computer network: NTLogin)
4. Enter your **Password** (computer network: NTPassword)
5. Click **Login**



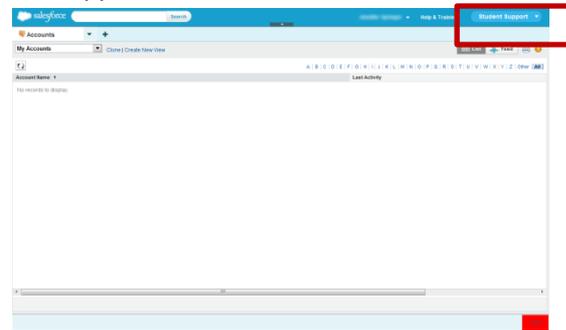
**Additional  
Notes &  
Questions**



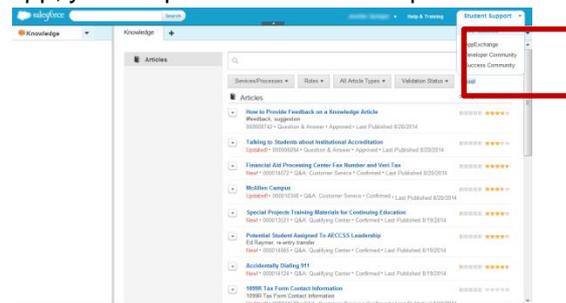
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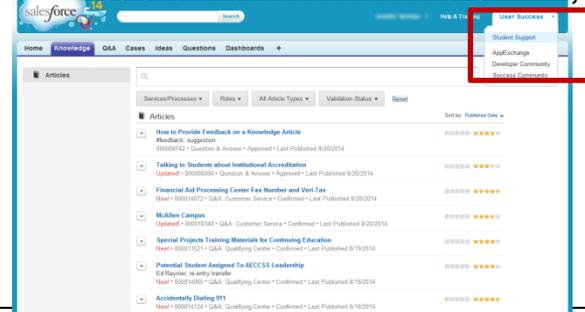
In the upper-right corner of the screen is the **App Menu** for navigating between Salesforce applications.



Click on the **App Menu** drop-down in the upper-right hand corner and select **User Success** app, your help center for user adoption and success.



Click on the **App Menu** drop-down in the upper-right hand corner and select the **Student Support** app, used for student relationship management.



**Additional  
Notes &  
Questions**

## 2. Use It

- Log into Salesforce
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Searching for information in the SRM knowledge base is convenient and easy to access from anywhere in the application.

### **Student Support App**

To access the knowledge base, click the navigation drop-down panel in the upper-left and select **Knowledge**. Then click the **Knowledge** tab to bring up the search field and article list.

(image 2.2a)

### **User Success App**

To access the knowledge base, click on **User Success** from the **Student Support** drop-down in the upper-right hand corner. Then click the **Knowledge** tab to bring up the search field and article list..

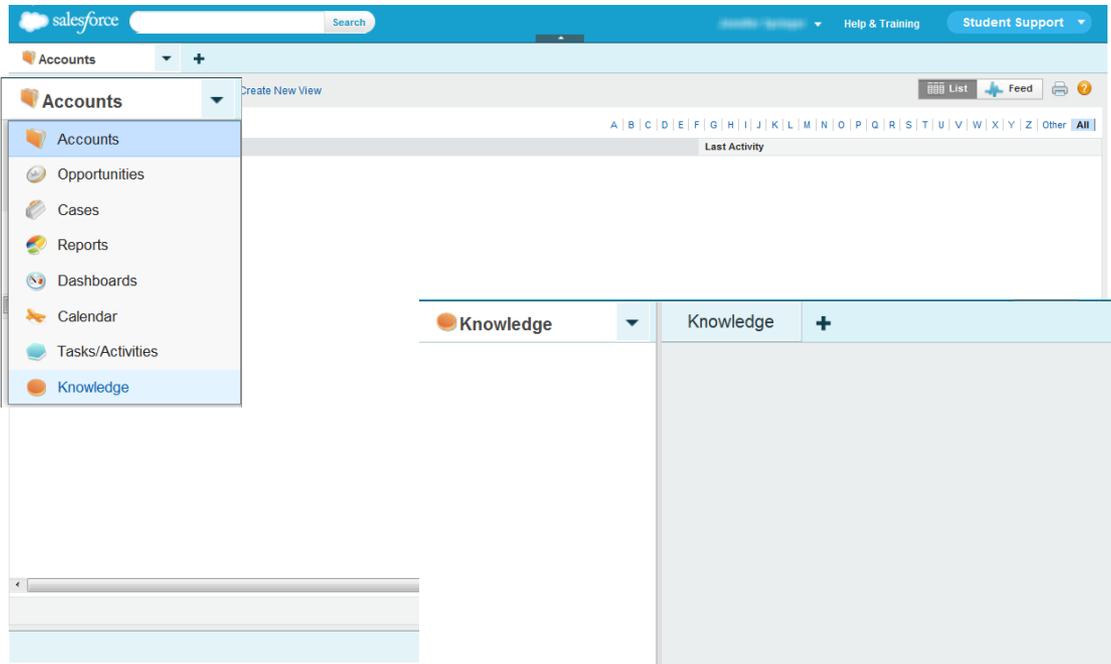
(image 2.2b)

### **Global Search**

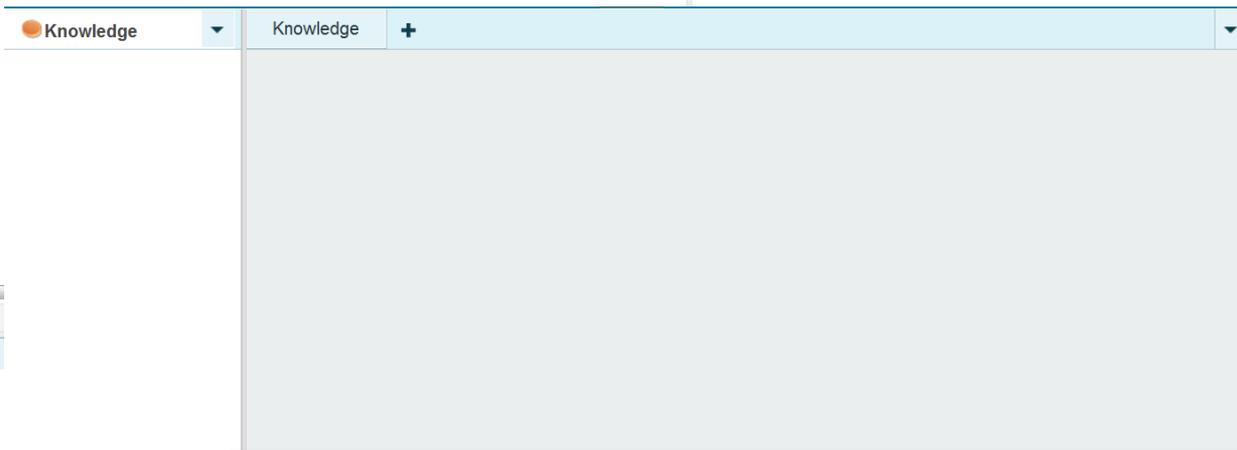
You also have the option to use the global search feature found in the upper-left area of any page in Salesforce. Use this option if you want to search the knowledge base as well as cases, student records, and other categories found in Salesforce.

(image 2.2c)

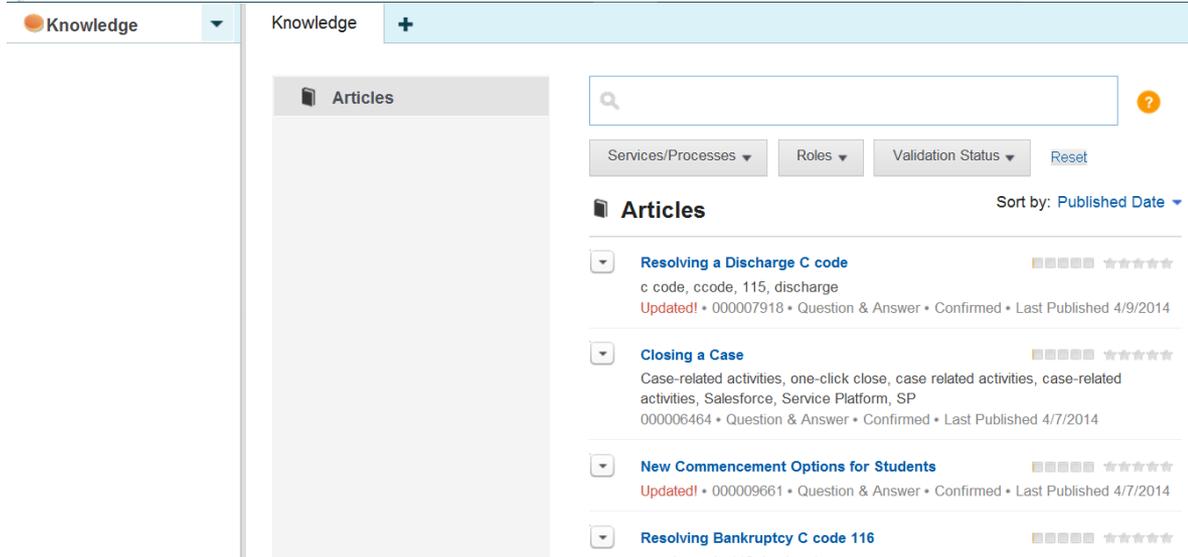
### **Additional Notes & Questions**



The image shows the top portion of a Salesforce interface. At the top is a blue header with the Salesforce logo, a search bar, and navigation links for 'Help & Training' and 'Student Support'. Below the header is a light blue navigation bar with a dropdown menu for 'Accounts' and a plus sign. A sidebar navigation menu is open on the left, listing 'Accounts', 'Opportunities', 'Cases', 'Reports', 'Dashboards', 'Calendar', 'Tasks/Activities', and 'Knowledge'. The main content area shows a 'Create New View' button and a list view header with 'List', 'Feed', and 'Print' icons. Below the header is a grid of columns labeled with letters A through Z and 'Other' and 'All'. The text 'Last Activity' is visible below the grid.

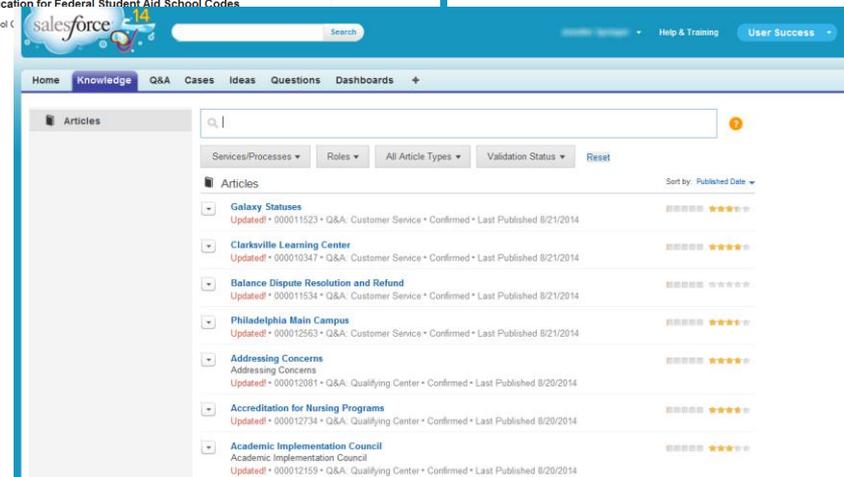
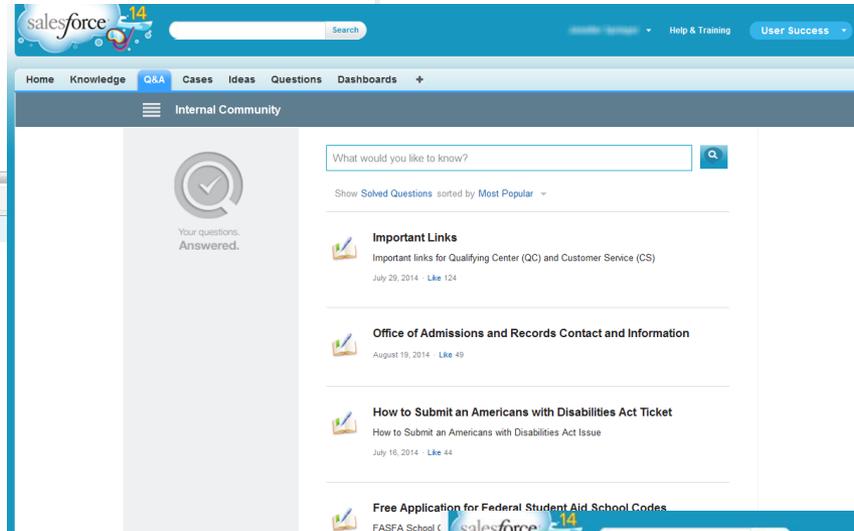
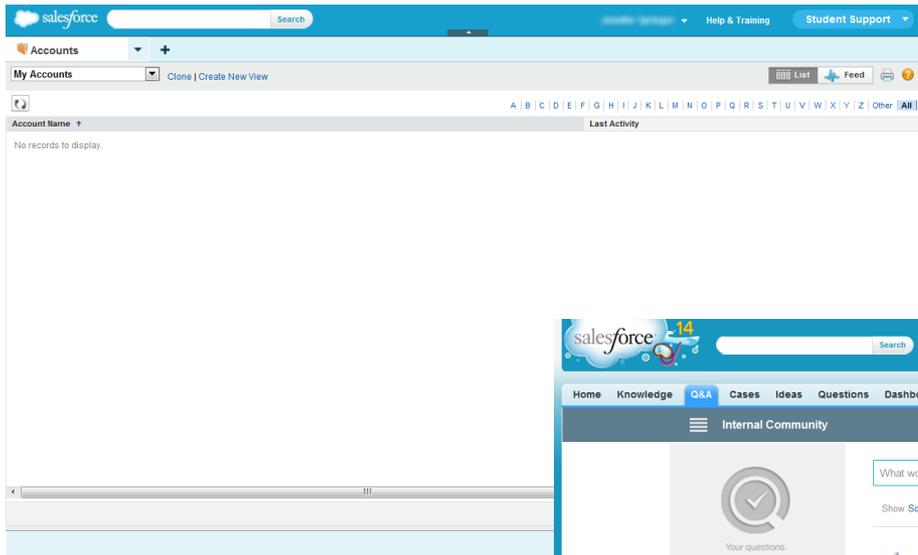


The image shows the header of a Salesforce Knowledge page. It features a light blue navigation bar with a dropdown menu for 'Knowledge' and a plus sign. The main content area is a large, empty grey rectangle.



The image shows the content area of a Salesforce Knowledge page. It features a light blue navigation bar with a dropdown menu for 'Knowledge' and a plus sign. Below the navigation bar is a section titled 'Articles' with a search bar and a plus sign. The search bar has a search icon and a question mark icon. Below the search bar are three filter buttons: 'Services/Processes', 'Roles', and 'Validation Status', followed by a 'Reset' button. The 'Articles' section is sorted by 'Published Date'. The list of articles includes:

- Resolving a Discharge C code** (5 stars)  
c code, ccode, 115, discharge  
Updated! • 000007918 • Question & Answer • Confirmed • Last Published 4/9/2014
- Closing a Case** (5 stars)  
Case-related activities, one-click close, case related activities, case-related activities, Salesforce, Service Platform, SP  
000006464 • Question & Answer • Confirmed • Last Published 4/7/2014
- New Commencement Options for Students** (5 stars)  
Updated! • 000009661 • Question & Answer • Confirmed • Last Published 4/7/2014
- Resolving Bankruptcy C code 116** (5 stars)



salesforce style guide Search

Accounts Knowledge Knowledge Search style guide

Recently Viewed Accounts  
Create New View  
List Feed

A B C D E F G H I J K  
L M N O P Q R S T U V  
W X Y Z Other All

Action	Account Name
Edit   +	Student Name
Edit   +	Student Name
Edit   +	Student Name
Edit   +	Student Name
Edit   +	Student Name

Options  
• All objects

- Articles [25+]
- Cases [25+]
- Contacts [1]
- Activities [5]
- Files [16]
- Case Comments [3]
- Notes [2]
- Accounts [0]
- People [0]
- Questions [0]
- Topics [0]
- Groups [0]
- Ideas [0]
- Attachments [0]
- Idea Themes [0]

Record Results Feed Results <sup>New!</sup>

Articles [25+]

To filter these search results, go to Articles.

Previous Page (1-25) Next Page

Article Number	Article Title	Type	Published Date	Summary
000005701	<a href="#">Enterprise Knowledge Management Content Style Guide</a>	Question & Answer	1/24/2014	
000005663	<a href="#">Admission Statuses</a>	Question & Answer	7/25/2013	
000006476	<a href="#">Linking Related Articles</a>	Question & Answer	1/22/2014	
000005956	<a href="#">Student Verification Process</a>	Question & Answer	9/6/2013	Salesforce, Service Platform, FERPA
000008533	<a href="#">Checking Voicemail in Genesys</a>	Question & Answer	11/4/2013	UCP Voicemail
000005934	<a href="#">Family Education Rights and Privacy Act Forms</a>	Question & Answer	7/23/2013	
000006259	<a href="#">Elective Courses</a>	Question & Answer	11/1/2013	elective guide, Matriculation4512675
000006320	<a href="#">Understanding Return of Title IV</a>	Question & Answer	9/6/2013	Return to lender, send back funds, incomplete academic year, refunds, R2T4

1-5 of 5 Previous Next Page 1 of 1

UCP

## 2. Use It

- Log into Salesforce
- Access the knowledge base
- **Use the Knowledge tab**
- Filter Search results
- Article Validation Status
- Use knowledge articles
- Search Q&A

On the **Knowledge** tab, enter keywords into the **Search Knowledge** field to locate knowledge articles on the chosen topic. Related knowledge base articles appear below the **Search Knowledge** field.

To avoid creating duplicate articles and increase the chance of finding the answers you need, remember to search trying different keywords if your first search doesn't produce the desired information. Search using the words or context of the intended audience. Think about who the information is for and how they would ask for it. An internal customer might ask a question about ecampus while an external customer might need the same information but reference Phoenix.edu instead.

(image 2.3a – show different keyword searches)

Search results will display based on various article criteria including title, data category, type, status, and rating.

Several pieces of information about each matching article is displayed.

(image 2.3.b)

### Additional Notes & Questions

Articles  
My Draft

clear for courses

Create Article

Search results for **clear for courses**

Published Services/Processes Roles Question & Answer Validation Status Reset

Articles Sort by: Relevance

Articles  
My Draft

clear

Search results

Published

Articles

Clear

000009658 • Question & Answer • Approved • Last Published 3/19/2014

Steps When Clearing for Registration in Salesforce with New Student Advisor SRM

☆☆☆☆☆

000009054 • Question & Answer • Approved • Last Published 5/13/2014

Transitioning a Student from the Enrollment Advisor to New Student Advisor Student Support

☆☆☆☆☆

000007014 • Question & Answer • Approved • Last Published 5/15/2014

Articles  
My Draft

clear for reg

Create Article

Search results for **clear for reg**

Published Services/Processes Roles All Article Types Validation Status Reset

Articles Sort by: Relevance

Clear to REG Policy: Risk Free Period Pilot  
000009658 • Question & Answer • Approved • Last Published 3/19/2014

Clearing Students for 2014-2015  
clear to REG, REG, 2014-2015, 14/15, 14-15, 2014/2015, award year, changes, REG policy  
000009965 • Question & Answer • Approved • Last Published 4/30/2014

Submitting an Application for REG in the Student Application Tracker  
After being cleared for APIN in SAT  
000006192 • Question & Answer • Approved • Last Published 9/6/2013

The screenshot shows a search result snippet with the following text: **Resolving a Discharge C code**, c code, ccode, 115, discharge, **Updated!** • 000007918 • Question & Answer • Confirmed • Last Published 4/9/2014. The snippet includes a dropdown arrow on the left, a progress indicator (one yellow square followed by four grey squares), and a five-star rating on the right.

Article Title

Keywords

New/Updated Indicator

Article Number

Article Type

Validation Status



## 2. Use It

- Log into Salesforce
- Access the knowledge base
- Use the Knowledge tab
- **Filter Search results**
- Article Validation Status
- Use knowledge articles
- Search Q&A

Upon receiving a list of search results, users have the option of filtering and sorting articles. You can sort articles by Relevance, Published Date, Best Rating, Most Viewed, and Title.

As we are in an everyone-sees-everything model, selecting a role will help narrow your results. We recommend to search without filters first then refine the results if too many articles are returned. This will allow you to benefit from knowledge in groups other than your own.

Articles can also be filtered by Services/Processes categories such as Programs & Courses to narrow search results to articles that apply to the chosen category.

An article may be assigned multiple categories. You can expect the categories and roles to grow and change with the organization as more groups start using the tool.

### Additional Notes & Questions

Screenshots of the filtering and sorting dropdowns are on 2.4a

Articles

Search bar with magnifying glass icon and a question mark icon.

Filters: Services/Processes, Roles, Validation Status, and a Reset link.

Articles

Filters: Services/Processes, Roles

Roles filter dropdown

Validation Status filter dropdown

- No Filter
- All
- Qualifying Center
- Customer Service Center
- Technical Assistance Center
- Enrollment
- Student Advocate
- Service Center
- Academic
- Financial

- No Filter
- All
- Application Support
- Business Support
- Faculty
- Employee
- Reporting
- Business Policy
- Contact Information
- Financial Services

Sort by: Published Date

- Published Date
- Best Rating
- Most Viewed
- Title: A to Z
- Title: Z to A

## 2. Use It

- Log into Salesforce
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- Filter Search results
- **Article Validation Status**
- Use knowledge articles
- Search Q&A

**Best Practice:**  
Click Show Feed on articles in Not Confirmed status to review pending #feedback to the content. This helps you to proceed with caution.

As we said before, the knowledge base is a growing resource that improves by use. There are many benefits to creating articles just-in-time by employees in the process of doing the job, rather than ahead-of-time by subject matter experts.

As the article is searched for and used, the knowledge in the article is validated. Each time we use an article, we are validating that the information is correct.

The **Validation Status** for each article shows in the search results list. (image 2.5a)

The article **Validation Status** indicates the level of review that the knowledge article has received.

Click to learn more about each status:

- **Not Confirmed** – Proceed with Caution – Article created by KCS I
- **Confirmed** – Article validated and styled by KCS II
- **Approved** – Ready for self-service

### Additional Notes & Questions

Narration:

Not Confirmed means that the article was created by a KCS licensed employee as a by-product of problem-solving and has not been validated. We suggest proceeding with caution and providing feedback if you find any errors in the article.

Confirmed means that the knowledge article has been validated and styled by a licensed employee.

Approved means that an article has been approved by Compliance and/or a SME if necessary and is ready for self-service consumption – in the future, customers will be able to search on their own for answers to common questions. Customers can include our students and employees.

Knowledge



Validation Status ▾

- No Filter
- Not Confirmed
- Confirmed
- Approved

Articles

Services/Processes ▾ Roles ▾ Validation Status ▾

Sort by: Published Date ▾

- Resolving a Discharge C code** ★★★★★  
c code, ccode, 115, discharge  
Updated! • 000007918 • Question & Answer • **Confirmed** • Last Published 4/9/2014
- Closing a Case** ★★★★★  
Case-related activities, one-click close, case related activities, case-related activities, Salesforce, Service Platform, SP  
000006464 • Question & Answer • Confirmed • Last Published 4/7/2014
- New Commencement Options for Students** ★★★★★  
Updated! • 000009661 • Question & Answer • Confirmed • Last Published 4/7/2014
- Resolving Bankruptcy C code 116** ★★★★★  
c code, code 116, bankruptcy  
000009800 • Question & Answer • **Not Confirmed** • Last Published 4/4/2014
- SPM to IS3 Academic Activity Comparison** ★★★★★

## 2. Use It

- Log into Salesforce
- Access the knowledge base
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- Filter Search results
- Article Validation Status
- **Use knowledge articles**
- Search Q&A

Click on the title of an article from any screen displaying search results to show the details of that article.

The knowledge article will typically display the information in a question and answer format including other notable information based on involved systems or internal processes.

(image 2.6a)

A knowledge article may also contain attached documents or other file types under the **Attachments** tab.

(image 2.6b)

To view article metadata, including the Validation Status, click the **Show Properties** link in the article.

(image 2.6c)

### Additional Notes & Questions

Knowledge

Enterprise Knowle...

Person Account Pa...



## Person Account Page Detail

Printable View | Help for this Page  Show Feed Follow

Rate This Article



(Average Rating: No Rating)

Version 4

Show Properties

**Information**

Role Centric

Attachments

**Question** What are the different sections on the Person Account page?

**Answer** Several Sections are available on the Person Account screen including:

- Phone Numbers
- Student Demographics
- Motivation
- Educational History
- Employment Information
- Specialty Affiliation (Ex: Military branch and status)
- IS3 Notes - this area includes notes entered into IS3 that share to Salesforce and vice versa. Notes should be used primarily with cases and activities to document all interactions with potential students.
- Custom Links
- System Information
- Financial Profiles
- Academic Profiles
- Open Activities
- Cases
- Opportunities
- HTML Email Status
- Activity History
- Notes - This area is used to note items not specific to an interaction. for example, an advocate might log a note regarding a fax being received and sent to another department. Use Priority Notes within the Demographics section for notes that should be shared.

For additional information, please see the **Attachments** tab.

**Additional Information**

For additional information, please see the following related article(s) and link(s):

- [Salesforce Highlight Banner](#)

Knowledge

Enterprise Knowle...

Person Account Pa...



## Person Account Page Detail

Printable View | Help for this Page



Show Feed



Follow

Rate This Article



(Average Rating: No Rating)

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Information

Role Centric

Attachments

Attachment 1

Page Detail Screenshot.pdf

Attachment 2

Attachment 3

Attachment 4



# Person Account Page Detail

Printable View | Help for this Page

Show Feed Follow

Rate This Article (Average Rating: No Rating)

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Show Properties

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- [Salesforce Highlight Banner](#)

**First Published** 7/11/2013 2:43 PM  
**Last Modified** 9/6/2013 12:58 PM  
**Last Published** 9/6/2013 12:58 PM

**Article Audience**

**Services/Processes** Application Support Student  
**Roles** Advocate, Service Center, Enrollment

**Channels** Internal App

**Article Number** 000006316  
**Summary** Salesforce, Service Platform SP  
**Validation Status** Approved



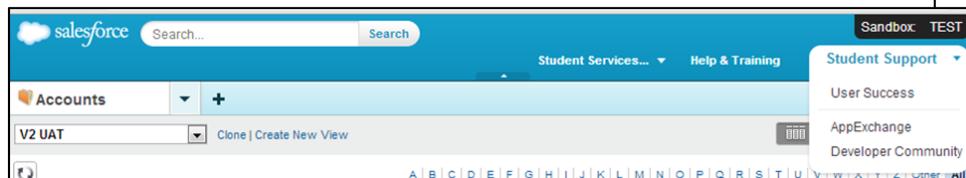
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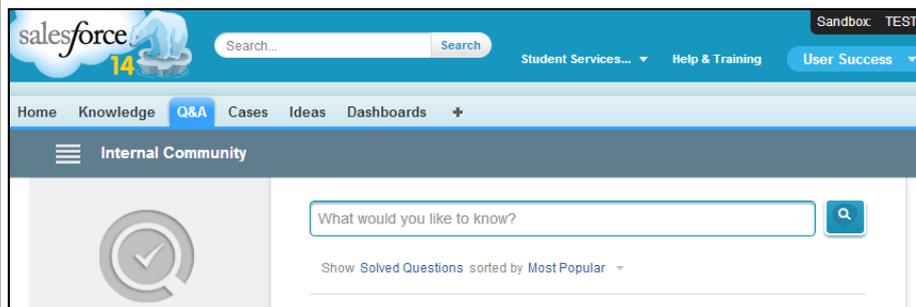
### Search Q&A

#### User Success Q&A Tab

User Success is an App within Salesforce where you can go to get additional assistance, it is like your help center for user adoption and success. Click on **User Success** from the **Student Support** drop-down in the upper-right hand corner.



The **Q&A** tab allows you to search for questions, FAQs, or KB articles that may answer your question. Post a question for others to answer, and answer a question asked by another user.



### Additional Notes & Questions

# Q&A Search

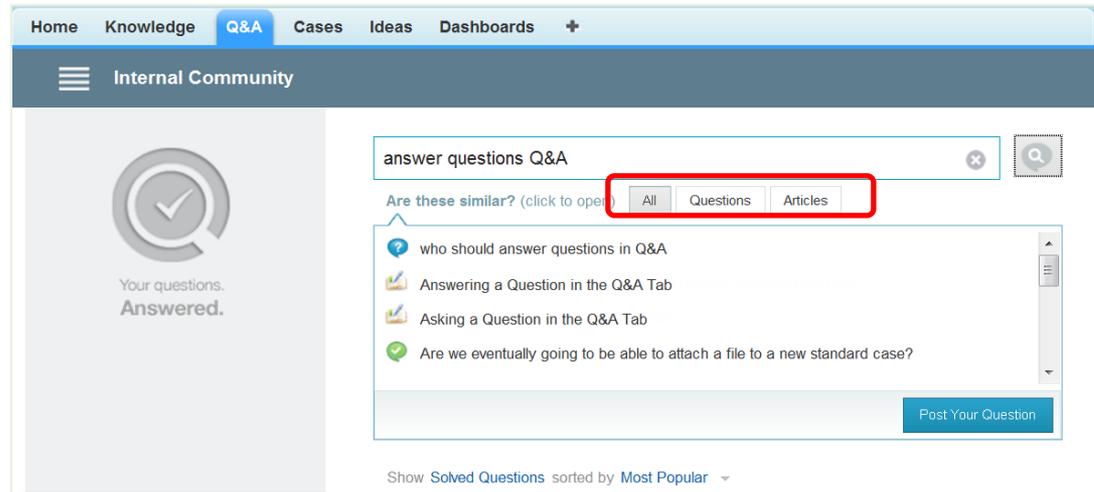
For example, let's say you wanted to review how to submit a case to the **User Success** app.

From the **Q&A** tab, type “user success” in the **What would you like to know?** search field. Click on the **magnifying glass** or press the **Enter** key to search. Results will appear and additional similar suggestions will be offered.

**Note:** When you find a knowledge article or an answered question that has helped resolve your issue, click the **Like** link to mark this as a good resolution. The more people who “Like” an item, the higher it is rated and returned in the search results.

The image displays two overlapping screenshots of the 'Internal Community' Q&A search interface. The top screenshot shows the search results for the query 'user success'. The search bar contains 'user success' and a magnifying glass icon. Below the search bar, there are tabs for 'All', 'Questions', and 'Articles'. The results list includes several items, with the top one being 'Submitting a Case for User Success'. Below the results, there is a 'Post Your Question' button and a sorting option 'Show All Questions sorted by Date Posted'. The bottom screenshot shows the search bar with the text 'What would you like to know?' and a magnifying glass icon. Below the search bar, there is a sorting option 'Show Solved Questions sorted by Most Popular'.

# Q&A Search Results



In the list of results, there are both questions and knowledge articles. Questions are created by users that have posted a question to the community for others to review and answer.

 Unanswered Question

 Answered Question

 Knowledge Article

Notice the search results open with the **All** button selected, displaying results including Questions and knowledge articles. Clicking on the **Questions** button will filter the results to only show posted questions, and the **Articles** button will filter the results to show only knowledge articles.

# Searching Options

Why would we use the **Knowledge** tab to search when we can search both knowledge articles and questions from the **Q&A** tab?

Knowledge tab	Q&A tab
<ul style="list-style-type: none"><li>• Search knowledge articles only</li><li>• Filtering</li><li>• Chatter feed</li><li>• #Feedback</li><li>• Follow</li><li>• Rating</li><li>• Properties</li><li>• Versions</li></ul>	<ul style="list-style-type: none"><li>• Search knowledge articles and Question/Answer</li><li>• Like</li></ul>

Searching from the **Knowledge** tab allows you to filter for more refined results, provide feedback, follow articles, and see properties like version and modification date.

Searching from the **Q&A** tab shows you all answers from **Q&A** and matching knowledge articles.

# 3. Flag It

The screenshot shows a software interface with a central red-bordered card titled "Improve". The card contains the following text:

**Improve**

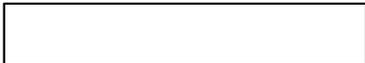
Improve - reuse is review: as employees, we take responsibility for the articles we interact with. If we see something that is wrong or that we do not understand, we have the responsibility to "flag it or fix it." If this sense of ownership is developed, reuse becomes review. We constantly review and improve the KCS articles that are being used.

Techniques:

1. Reuse is Review
2. Flag It or Fix It
3. License to Modify

The card is part of a larger interface with a sidebar on the left labeled "Improve" and a top bar with "Roles". To the right of the card is a vertical stack of three "Technique" buttons (Technique 1, 2, 3). Below these is a horizontal row of four buttons: "Capture", "Structure", "Reuse", and "Improve". A yellow sticky note titled "Key Candidate Responsibility" is placed over the "Reuse" and "Improve" buttons. The sticky note contains an information icon and a "Flag It" icon. At the bottom of the interface, there are two text boxes: "knowledge collective to date." and "Reward learning, collaboration, sharing, and improving."

3.23

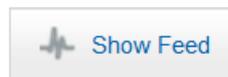


### 3. Flag It

- Provide feedback on a knowledge article

Since reuse is review, providing your feedback is the key to accurate and current knowledge articles.

To provide specific suggestions for the article, click the **Show Feed** link.



Enter feedback into the freeform field preceded by “#feedback”. This flags the article for review by an employee that is licensed to update articles in the KCS process.

Feedback should include specific details about what needs to be updated and the source for the updated information. For example, “#feedback **The phone number has been changed and the correct number is xxx-xxxx. Here is a link to the source of the information http://...**,” and click **Share**.

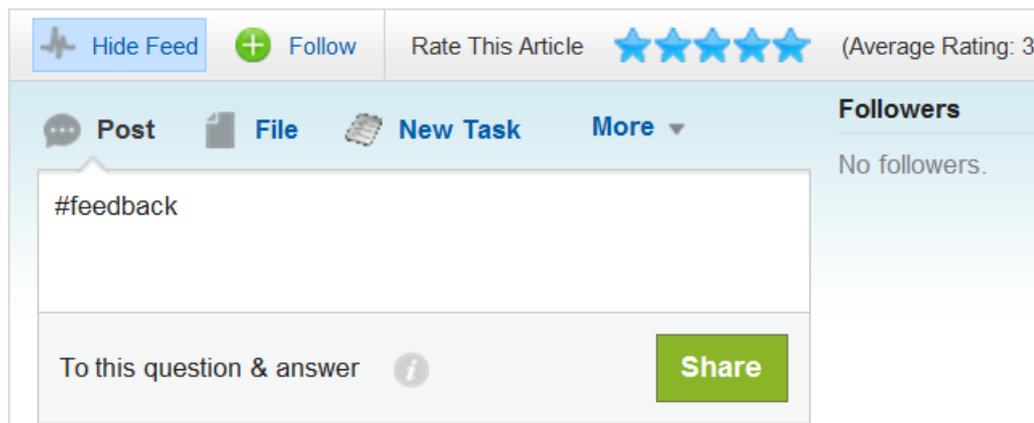
Once the feedback is posted, note that there is a case number assigned that you can search through the global search, or from your personal feed, to track the status of the case.

#### Additional Notes & Questions

Emphasize #feedback

Types of changes

- Inaccurate content
- Incorrect spelling and grammar
- Keywords
- Duplicate removal request



salesforce  Search Settings Help & Training Student Support

Knowledge Knowledge Person Account Pa... +

## Person Account Page Detail Printable View | Help for this Page

[Hide Feed](#) [Follow](#) Rate This Article ★★★★☆ (Average Rating: 4) Version 4 [Show Properties](#)

[Post](#) [File](#) [New Task](#) [More](#) **Followers**  
No followers.

#Feedback

To this question & answer [Share](#)

[Show All Updates](#)

 **Employee Name** ▼  
( Case Created:1266763) #Feedback  
Please update this article  
Topics: Feedback  
[Comment](#) · [Like](#) · September 5, 2013 at 4:28 PM

**Information** Role Centric Attachments

## 3. Flag It

- Rate knowledge articles
- Provide feedback on a knowledge article

Practice identifying types of changes to flag in the following articles.

(eDev: Following four slides with different problem areas. Before and after screen shots on each slide. Inaccurate article is bordered in **red** and the accurate one is bordered in **green**.)

### Additional Notes & Questions

Emphasize  
#feedback



# Article 1. Bolding

Slide 3.2a

Home Knowledge Q&A Cases Ideas Dashboards +

## International Admission Requirements

Show Feed Follow Rate This Article ☆☆☆☆☆ (Average Rating: No Rating) Edit Version 1

« Back to Knowledge Search

Information Attachments Internal Notes

Question Where can a representative locate information regarding the international admission requirements?

Answer Perform the following to locate international admission requirements:

- International Admissions:
  1. Go to [www.phoenix.edu](http://www.phoenix.edu)
  2. At the bottom of the page click Global Education under Divisions
  3. Click International Admissions
- Foreign Education:
  1. Go to [www.phoenix.edu](http://www.phoenix.edu)
  2. Hover mouse over Admissions, click Admissions Information
  3. Under Admissions, click Transfer credits
  4. Under Foreign Students, click educational institutions outside the United States

Additional Information No Additional Information

Hide Feed Follow Rate This Article ★★★★★ (Average Rating: 3)

Post File New Task More

#feedback

To this question & answer ? Share

Show All Updates

There are no updates.

Followers  
No followers.

Home Knowledge Q&A Cases Questions Dashboards +

## International Admission Requirements

Show Feed Follow Rate This Article ☆☆☆☆☆ (Average Rating: 4.5) Edit Version 2

« Back to Knowledge Search

Information Attachments Internal Notes

In Progress

Question Where can a representative locate information regarding the international admission requirements?

Answer Perform the following to locate international admission requirements:

- International Admissions:
  1. Go to [www.phoenix.edu](http://www.phoenix.edu)
  2. At the bottom of the page click **Global Education** under Divisions
  3. Click **International Admissions**
- Foreign Education:
  1. Go to [www.phoenix.edu](http://www.phoenix.edu)
  2. Hover mouse over Admissions, click **Admissions Information**
  3. Under Admissions, click **Transfer credits**
  4. Under Foreign Students, click **educational institutions outside the United States**

Additional Information No Additional Information

Home Knowledge Q&A Cases Ideas Dashboards +

## How to Submit a Case to Human Resources in MyHr

Show Feed Follow Rate This Article (Average Rating: No Rating) Edit Version 1

« Back to Knowledge Search

Information Attachments Internal Notes

Question How do I submit a case to HR in MyHr?

Answer Steps to submit a case to HR in MyHr:

- Open a **Mozilla Firefox** web browser
- Enter **MyHr** in the **Address Bar**
- Press **Enter**
- Enter your **User ID and Password**
- Click **Main Menu**
- Click **My Service Center**
- Click **My Service Center Self Service**
- Select **Add a Case**
- Select an option from the drop down menu in **Contact D**
- Enter the Requested Information in the **Form Fields**
- Click **Submit**

Additional Information No Additional Information

Hide Feed Follow Rate This Article (Average Rating: 3)

Post File New Task More

#feedback

To this question & answer Share

Show All Updates

There are no updates.

Home Knowledge Q&A Cases Questions Dashboards +

## How to Submit a Case to Human Resources in MyHr

Show Feed Follow Rate This Article (Average Rating: 4) Edit Version 2

« Back to Knowledge Search

Information Attachments Internal Notes

In Progress

Question How do I submit a case to HR in MyHr?

Answer Steps to submit a case to HR in MyHr:

1. Open a **Mozilla Firefox** web browser
2. Enter **MyHr** in the **Address Bar**
3. Press **Enter**
4. Enter your **User ID and Password**
5. Click **Main Menu**
6. Click **My Service Center**
7. Click **My Service Center Self Service**
8. Select **Add a Case**
9. Select an option from the drop down menu in **Contact Details**
10. Enter the Requested Information in the **Form Fields**
11. Click **Submit**

Additional Information No Additional Information

# Article 3. Incorrect web address

Home Knowledge Q&A Cases Ideas Dashboards +

Phoenix.edu

Show Feed Follow Rate This Article (Average Rating: No Rating) Edit Version 1

Printable View | Help for this Page

Hide Feed Follow Rate This Article (Average Rating: 3)

Post File New Task More

Followers: No followers.

#feedback

To this question & answer Share

Show All Updates

There are no updates.

Information Attachments Internal Notes

Question: What kind of materials are found on [Phoenix.edu](#)?

Answer: [Phoenix.com](#) is University of Phoenix's public facing website and is a valuable resource for staff and students.

Refer students to phoenix.gov when talking with them about degree programs, tuition and expenses, responsible borrowing, academic and admission policies, and be a University of Phoenix student.

Additional features of phoenix.edu include the following:

- Academics – Information about programs and courses, accreditation, and University of Phoenix's colleges/schools.
- How It Works – Information on getting started, the graduation team, campus and online learning, faculty, paying for school, and programs.
- Continuing Education – Information about individual courses, teacher education, certificate programs, and professional development.
- Support – Information about how to contact University of Phoenix regarding questions of admission, academics, financial options, joining the faculty or other University of Phoenix matters.
- Admissions – Information on tuition, finance options, enrollment, scholarships, transfer credit, and admissions.
- About – Information about University of Phoenix including its history, links to the Office of the President, green initiative, program finder, and campus locations.
- Alumni – Information about alumni profiles, Phoenix Focus (University of Phoenix's Alumni virtual magazine), and the Alumni Association.
- Military – Academic, tuition, and location information specific to military personnel and their spouses

Additional Information

Home Knowledge Q&A Cases Questions Dashboards +

Phoenix.edu

Show Feed Follow Rate This Article (Average Rating: No Rating) Edit Version 4 Show Properties

Printable View | Help for this Page

Information Role Centric Attachments Administrative

Question: What kind of materials are found on [Phoenix.edu](#)?

Answer: [Phoenix.edu](#) is University of Phoenix's public facing website and is a valuable resource for staff and students.

Refer students to phoenix.edu when talking with them about degree programs, tuition and expenses, responsible borrowing, academic and admission policies, and [How it works](#), a page dedicated to what it is like to attend our school and be a University of Phoenix student.

Additional features of phoenix.edu include the following:

- Academics – Information about programs and courses, accreditation, and University of Phoenix's colleges/schools.
- How It Works – Information on getting started, the graduation team, campus and online learning, faculty, paying for school, and programs.
- Continuing Education – Information about individual courses, teacher education, certificate programs, and professional development.
- Support – Information about how to contact University of Phoenix regarding questions of admission, academics, financial options, joining the faculty or other University of Phoenix matters.
- Admissions – Information on tuition, finance options, enrollment, scholarships, transfer credit, and admissions.
- About – Information about University of Phoenix including its history, links to the Office of the President, green initiative, program finder, and campus locations.
- Alumni – Information about alumni profiles, Phoenix Focus (University of Phoenix's Alumni virtual magazine), and the Alumni Association.
- Military – Academic, tuition, and location information specific to military personnel and their spouses

Additional Information: No Additional Information

# Article 4. Incorrect Content

This screenshot shows a knowledge article titled "Social Work Licensures" in a system with a navigation bar (Home, Knowledge, Q&A, Cases, Ideas, Dashboards). The article header includes "Show Feed", "Follow", "Rate This Article" (with 5 empty stars and "(Average Rating: No Rating)"), "Edit", and "Version 1". A "Back to Knowledge Search" link is present. The article content is under the "Information" tab and includes:

- Question:** What licenses are available for social work?
- Answer:** There is no such thing as being a licensed social worker. There are no federal or state level requirements to be a social worker.
- Additional Information:** For additional information, please see the following related articles:
  - [Social Work](#)
  - [QTask and NCC Task Routing for Social Work](#)

A right-hand sidebar contains a "Post" section with a "#feedback" input field, a "Share" button, and a "Followers" section showing "No followers".

This screenshot shows the same knowledge article "Social Work Licensures" but with updated content. The navigation bar now includes "Questions" instead of "Ideas". The article header shows "(Average Rating: 4.7)" and "Version 3". The article content is under the "Information" tab and includes:

- In Progress:**
- Question:** What licenses are available for social work?
- Answer:** Each state has its own regulatory board for licensing social workers. While some regulations may overlap from state to state, it is important to know exactly what your desired licensing board will require of you
- Additional Information:** For additional information, please see the following related articles:
  - [Social Work](#)
  - [QTask and NCC Task Routing for Social Work](#)

# 4. Fix It

Start Learning Button

## 4. Fix It

- Follow up on article feedback

As a KCS I Candidate, you can only modify your own articles that are in draft form. Published articles can be modified by a KCS II Contributor or higher role.

Please note that the **#feedback** label is required to ensure the suggestion will be reviewed. Previously submitted suggestions will be available to view under the chatter **Show Feed** area in each knowledge article.



**Note:** **#feedback** is not case sensitive and can be placed anywhere in the text.

After you submit a suggestion, look for the case number in the chatter feed. (image 4.1a)

Use this number in the general search field to view the status of your suggestion at a later date. Any feedback that you provide will show in your personal chatter feed. (image 4.1b)

You can also click the **Follow** link to receive notifications when the article is updated.



**Tip:** Follow articles that are important to your role to be notified when an update or change is made. This is a great way to keep track of processes and articles that you use frequently.

### Additional Notes & Questions

salesforce person account Search Help & Training Student Support

Knowledge Knowledge Person Account Pa... +

### Person Account Page Detail Printable View | Help for this Page ?

Hide Feed Follow Rate This Article (Average Rating: 4) Version 4 Show Properties

Post File New Task More Followers

Write something... Share No followers.

Show All Updates

**Employee Name**  
( Case Created:1266763) #Feedback  
Please update this article  
Topics: Feedback  
Comment Like September 5, 2013 at 4:28 PM

**Information** Role Centric Attachments

**Question** What are the different sections on the Person Account page?

**Answer** Several Sections are available on the Person Account screen including:

- Phone Numbers
- Student Demographics
- Motivation

salesforce 1266763 Search Knowledge Account Pa... 1266763

Search 1266763

Record Results Feed Results <sup>New!</sup>

**Options** Edit

- All objects

Cases [1]

- Articles [0]
- Accounts [0]
- Contacts [0]
- Activities [0]
- Questions [0]
- Topics [0]
- Groups [0]
- People [0]
- Files [0]
- Ideas [0]
- Attachments [0]
- Case Comments [0]
- Idea Themes [0]
- Notes [0]

**Cases [1]** My Columns

Action	Case Number	Created By Alias	Subject	Case Record Type	Type	Status	Date/Time Opened	Case Owner Alias
<a href="#">Edit</a>	1266763		<a href="#">#Feedback Please update this a</a>	Knowledge Feedback		Closed	9/5/2013 4:28 PM	<a href="#">Knowledge Feedback</a>

[Back To Top](#)

Sort By Most Recent Activity

1377732 — Ryan Egan created a case.

1377732

Subject: #feedback fix this article.  
Priority: Low  
Status: Open  
Case Number: 1377732

Comment · Like · Today at 10:26 AM

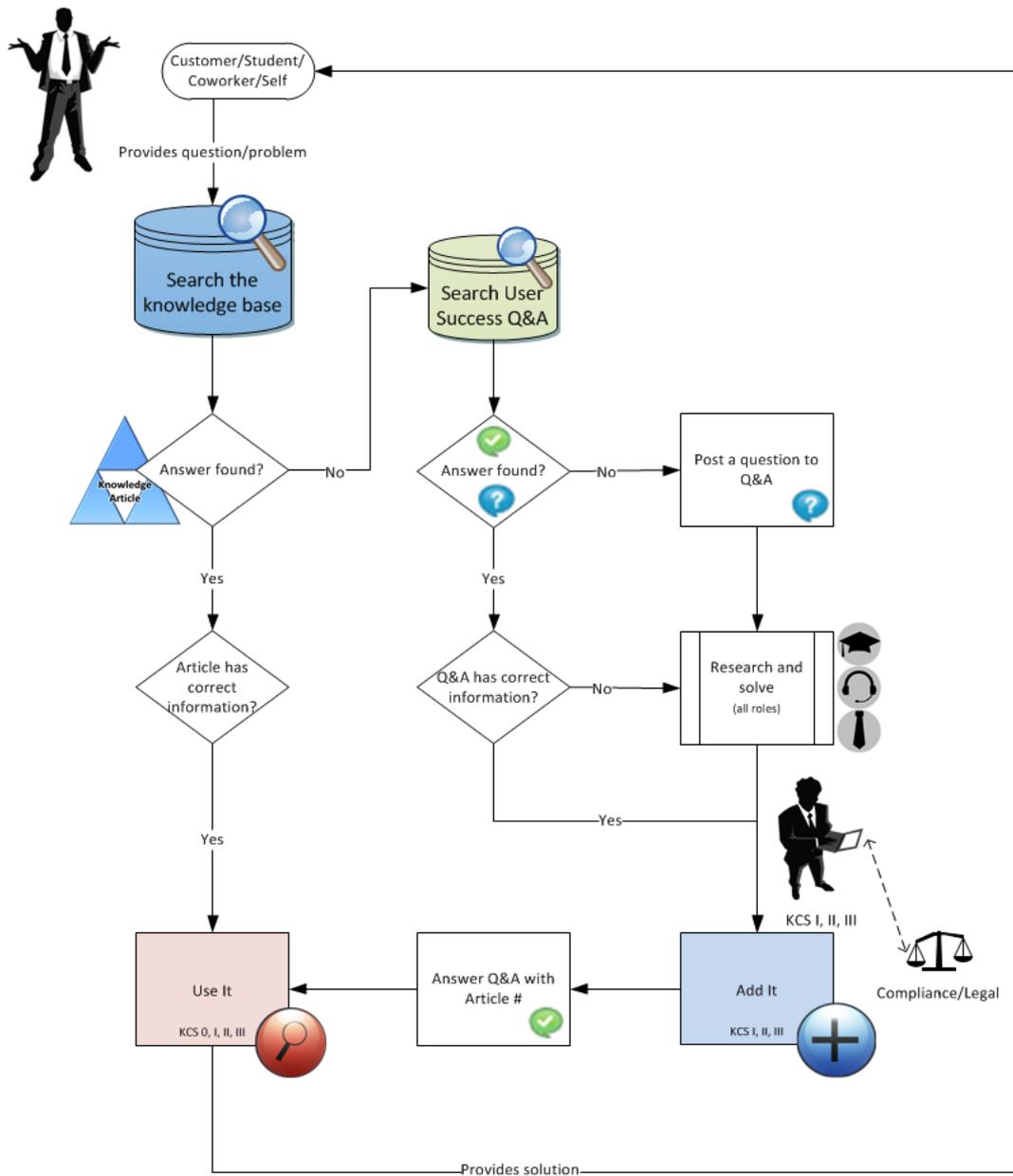
Spring 14 release — Ryan Egan to Apollo Group Only

( Case Created:1377732) #feedback: fix this article.



# 5. Add It

Start Learning Button



[eDev: Talk through process, zooming in on sections of flowchart.]

## 5. Add It

- Post a question to User Success Q&A
- Create a new knowledge article

If you were unable to find an article in the knowledge base to answer your question, and unable to discover the answer yourself, then you should post a question to the **User Success** community.

Click on **User Success** from the App menu drop-down in the upper-right corner.

Click the **Q&A** tab and search for the question or topic.  
(image 5.1a)

The **Q&A** tab allows you to search for questions, FAQs, or knowledge articles that may answer your question. Post a question for others to answer, and answer a question asked by another user.

To learn about the other tabs in the **User Success** app , review the **User Success Overview**. <http://newsource/Learning/Library/Permalink/C13-3933-E1.aspx>

### Additional Notes & Questions

The screenshot shows the Salesforce Knowledge interface. At the top, there is a search bar and navigation links for "Services/Processes", "Roles", "Validation Status", and "Reset". A "Student Support" dropdown menu is open, showing options for "User Success", "AppExchange", and "Developer Community". The main content area is titled "Articles" and lists two articles:

- Americans with Disabilities Act (ADA) Appropriate Documentation**  
ADA  
Updated! • 000007091 • Question & Answer • Confirmed • Last Published 4/11/2014
- Do Not Call, Internal Do Not Call, and Do Not Email for Student Services**  
Academics, Student Services, Active Students, DNC, iDNC, DNE, tdrop, t-drop, tdrp  
Updated! • 000006581 • Question & Answer • Approved • Last Published 4/11/2014

The screenshot shows the Salesforce Internal Community Q&A interface. At the top, there is a search bar and navigation links for "Home", "Knowledge", "Q&A", "Cases", "Ideas", and "Dashboards". The main content area is titled "Internal Community" and features a search bar with the text "What would you like to know?". Below the search bar, there is a "Show Solved Questions" link and a "sorted by Most Popular" dropdown menu. The main content area lists two questions:

- Enterprise Knowledge Management Content Style Guide**  
January 24, 2014 · Like 2
- Checking Voicemail in Genesys**  
UCP Voicemail  
November 4, 2013 · Like 6

# Posting a Question

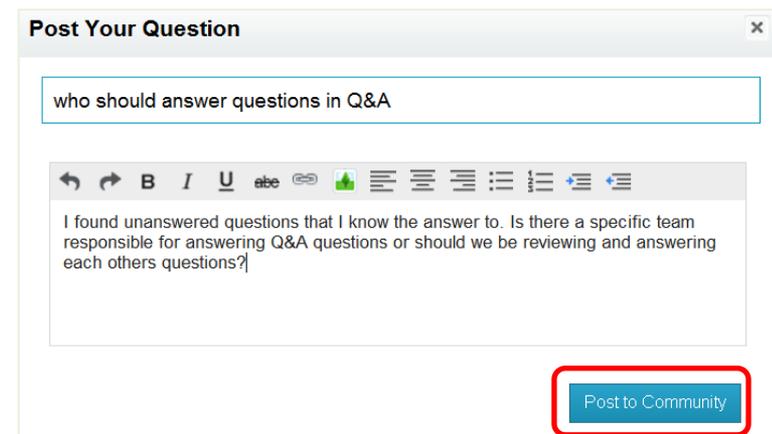
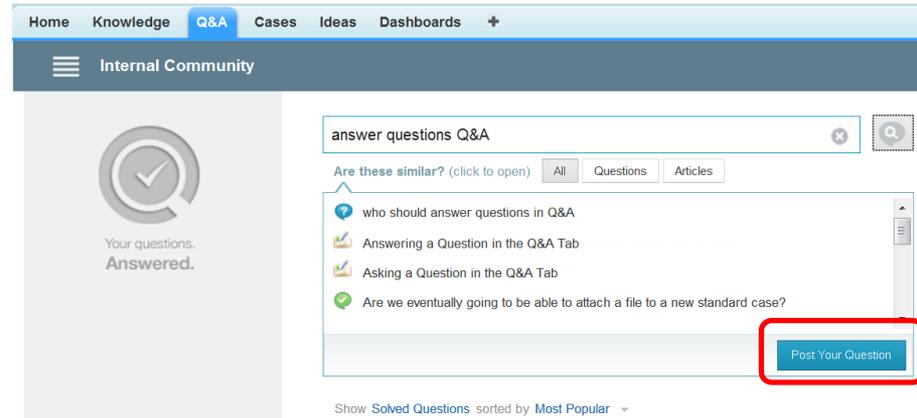
## Posting a Question

When a search returns no answers or knowledge articles that resolve your question, post the question for the community to review and answer. To post a new question, click the **Post Your Question** button.

Add detail as needed, including images, links, or any other accompanying information. When you are done, click **Post to Community**.

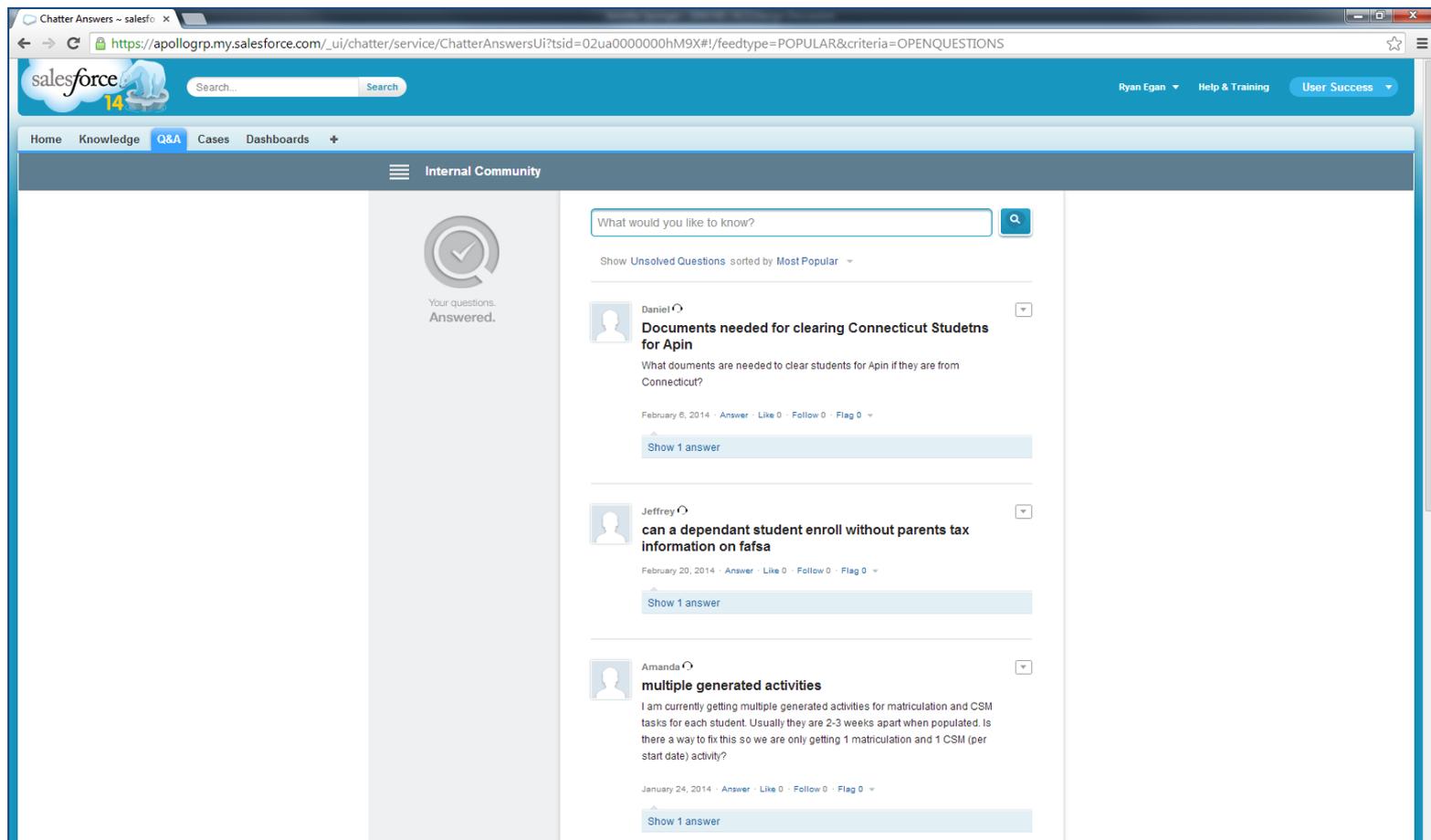
A team will be monitoring questions, like a moderator, and have the ability to modify or remove a question or answer when necessary.

In addition to posting questions, you should also be contributing answers to questions asked by others.



# Follow a Question

Click the **Follow** link on a question to be notified in your chatter feed when the question is answered.



The screenshot displays the Salesforce Chatter Answers interface. The browser address bar shows the URL: [https://apollogrp.my.salesforce.com/\\_ui/chatter/service/ChatterAnswersUi?tsid=02ua000000hM9X#!?feedtype=POPULAR&criteria=OPENQUESTIONS](https://apollogrp.my.salesforce.com/_ui/chatter/service/ChatterAnswersUi?tsid=02ua000000hM9X#!?feedtype=POPULAR&criteria=OPENQUESTIONS). The page header includes the Salesforce logo, a search bar, and user information for Ryan Egan. The main navigation bar shows 'Home', 'Knowledge', 'Q&A', 'Cases', and 'Dashboards'. The 'Internal Community' section is active, displaying a search bar and a 'Show Unsolved Questions sorted by Most Popular' filter. Three questions are listed:

- Daniel**: Documents needed for clearing Connecticut Studetns for Apin. February 6, 2014. Answer · Like 0 · Follow 0 · Flag 0. [Show 1 answer](#)
- Jeffrey**: can a dependant student enroll without parents tax information on fafsas. February 20, 2014. Answer · Like 0 · Follow 0 · Flag 0. [Show 1 answer](#)
- Amanda**: multiple generated activities. January 24, 2014. Answer · Like 0 · Follow 0 · Flag 0. [Show 1 answer](#)

# Filter and Sort Questions

## Filter and Sort Questions

To filter questions, click **Solved Questions** and select an option from the **Show** list. For example, selecting **Unanswered Questions** is a convenient way to view a list of unanswered questions that are awaiting a community response. You can also sort the questions by **Date Posted**, **Recent Activity**, and **Most Popular**.

The screenshot displays the 'Internal Community' interface. On the left, there is a large grey box with a circular icon containing a checkmark and the text 'Your questions. Answered.' Below this, the footer contains 'Copyright © 2000-2'. On the right, there is a search bar with the placeholder text 'What would you like to know?' and a magnifying glass icon. Below the search bar, a dropdown menu is open, showing the current filter 'Show Solved Questions sorted by Most Popular' and a list of options: 'SHOW', 'All Questions', 'Unanswered Questions' (which is selected with a checkmark), 'Unsolved Questions', 'Solved Questions', 'My Questions', 'SORTED BY', 'Date Posted' (selected with a checkmark), 'Recent Activity', and 'Most Popular'. A blue bar at the bottom of the page contains the text 'ved. | Privacy Statement | Security Statement | Terms of Use | 5'.

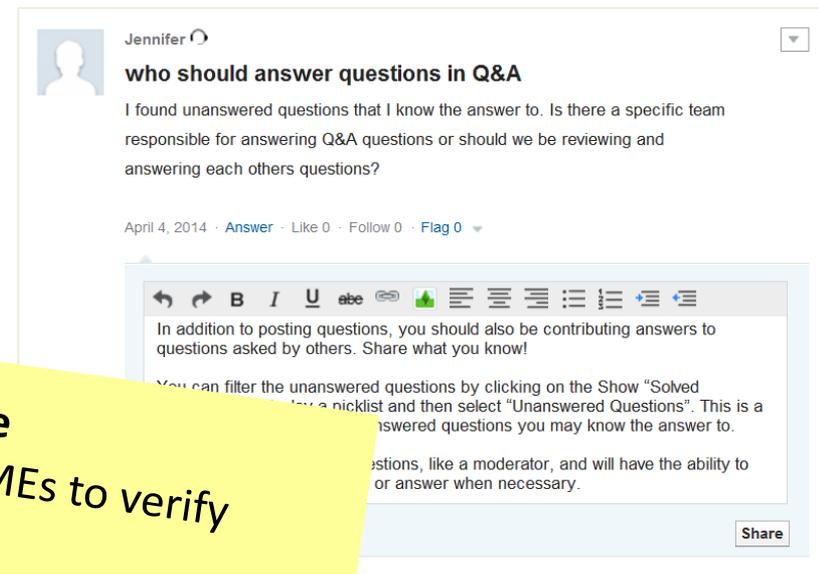
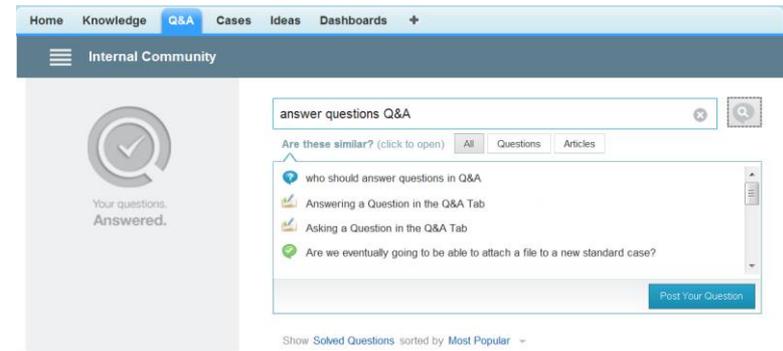
# Answering a Question

## Answering a Question

Everyone has the ability to answer a question posted to **Q&A** and we encourage you to support your peers by answering questions. Asking and answering questions helps build our collective knowledge and identify articles that need to be added to the knowledge base.

To answer a question, click on the question from the drop-down.

Click **Answer**. A text box will appear allowing you to add your answer, including images, links, and any other detail you'd like to include. When you are done, click **Share** to share the answer.



### Best Practice

1. Utilize SMEs to verify answers
2. Direct to KB articles when available
3. Keep in mind these questions are visible to all departments



# Create a New Article

Let's look at the process of creating a new knowledge article.

## High Level Summary

1. Click the **Create Article** button
2. Select the appropriate template from the drop-down
3. Enter a **Title**
4. Leave the **Validation Status** as **Not Confirmed**
5. Enter the **Question**
6. Enter the **Answer**
7. Enter any **Additional Information**
8. Indicate the source in the **Internal Notes**
9. Indicate the appropriate **Services/Processes** data category
10. Click **OK**
11. Repeat for the **Roles** data category
12. Click **Save**
13. Click **Submit for Approval**

Next we will look at each step in more detail and provide you with tips and best practices for each area.

## 5. Add It

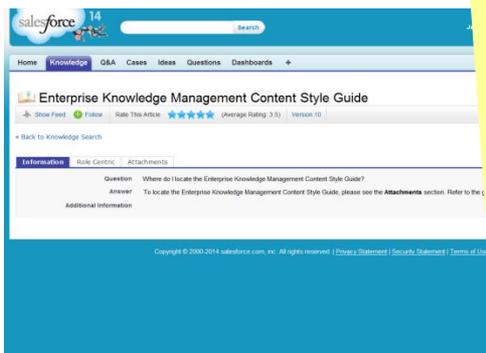
Expectations as a KCS I Candidate:

- Accurate and complete content
- Duplicate accuracy
- Information source included
- Use of correct template
- Ensuring that compliance risk topics are marked for compliance approval

The Style Guide was created to provide:

- Consistent structure to articles
- Increase readability of articles
- Ensure professionalism

To view the standard Style Guide, go to the Salesforce **Knowledge** tab and search for article # **5701** titled **Enterprise Knowledge Management Content Style Guide**. Your department may have a specialized Style Guide so please check with leadership for any department specific formatting requirements.



As a KCS I Candidate, we want you creating articles and not spending too much time or effort with styling the article. Capture the information with guidance from the Style Guide.

Additional  
Notes &  
Questions

# Create Article

Click the **Create Article** button.

Select the appropriate template from the drop-down menu. You will see different options based on your role.

The screenshot displays the Salesforce Knowledge interface. At the top, the Salesforce logo and version number '14' are visible, along with a search bar and a 'User Success' dropdown menu. The navigation bar includes 'Home', 'Knowledge', 'Q&A', 'Cases', 'Ideas', 'Idea Themes', and 'Dashboards'. The main content area shows a list of articles with columns for status (e.g., 'Updated!', 'New!'), article ID, Q&A category, and approval status. A 'Create Article...' button is highlighted, and its dropdown menu is open, showing various article templates such as 'Q&A: Academic', 'Q&A: Customer Service', 'Q&A: Enrollment', 'Q&A: Ethics and Compliance', 'Q&A: Finance', 'Q&A: Human Resources', 'Q&A: New Student Advisor', 'Q&A: Qualifying Center', 'Question & Answer', and 'Symptom Cause Resolution'. The 'Question & Answer' option is currently selected.

# Title/URL Name/Summary

The screenshot shows the Salesforce Knowledge 'New Article' form. The top navigation bar includes the Salesforce logo, a search bar, and the text 'Sandbox: KBTRAIN' and 'User Success'. The main navigation bar contains links for Home, Knowledge, Q&A, Cases, Ideas, Idea Themes, and Dashboards. The page title is 'Article Edit' and 'New Article'. The form is divided into several sections:

- Article Assignment:** Includes fields for Assigned To (Jennifer Springer), Assigned By (Jennifer Springer), Instructions (--), and Assignment Due Date (--).
- Article Properties:** Includes Publishing Status (Draft), Type (Question & Answer), Article Number, Created By, and Last Modified By (Jennifer Springer).
- Article Number:** A field for the article number.
- Title:** A text input field for the article title.
- URL Name:** A text input field for the URL name, with a help icon.
- Summary:** A text area for the article summary.
- Validation Status:** A dropdown menu currently set to 'Not Confirmed'.
- Information:** A section with a 'Question' field.

Buttons at the top of the form include 'Save & Close', 'Save', 'Cancel', 'Assign...', 'Publish...', and 'Preview'.

Enter a **Title** – Keep it brief with no special characters (Example: - & \_ ( ) # @). It is important to only use alphanumeric characters because a unique URL will be created from the title.

Do not change the **URL Name** automatically created from the title.

Use the **Summary** field to enter keywords for search optimization (business jargon, acronyms, student terms).

# Validation Status/Question

salesforce 14

Sandbox: KBTRAIN

User Success

Home Knowledge Q&A Cases Ideas Idea Themes Dashboards +

Article Edit  
New Article

Help for this Page ?

Save & Close Save Cancel Assign... Publish... Preview

**Article Assignment**

Assigned To	Jennifer Springer
Assigned By	Jennifer Springer
Instructions	--
Assignment Due Date	--

**Article Properties**

Publishing Status	Draft
Type	Question & Answer
Article Number	
Created By	
Last Modified By	Jennifer Springer

**Article Number**

Title

URL Name ?

Summary

Validation Status ? Not Confirmed

**Information**

Question

Leave the **Validation Status** as **Not Confirmed** - The validation status will always be **Not Confirmed** for articles created by a KCS I Candidate until it is reviewed, validated, and styled by a KCS II Contributor.

Enter the **Question** – Voice of the end user (Example: “How do I clear cache and cookies?” versus “How do I walk the student through clearing cache and cookies?”)

# Answer

Enter the **Answer**.

The screenshot shows a 'Draft' article of type 'Question & Answer' created by Jennifer Springer. The 'Information' tab is active, showing a 'Question' field and an 'Answer' field. The 'Answer' field contains a rich text editor with a toolbar including options for source, undo, redo, bold, italic, underline, link, unlink, list, and text color. The validation status is 'Not Confirmed'.

**Numbered (Ordered) List**  
Use for a process or list of steps

**Bulleted (Unordered) List**  
Use when the order of the list doesn't matter

ANSWER

ACTIVE VOICE AND ACTION TERMS

Write in a brief and directive manner beginning with an action verb.

**Good example:** Click Tax Forms/1098T

**Bad example:** Have the student click Tax Forms/1098T

**Style Guide Example**

Items	Example Verbiage
Links, buttons, menus	Click <b>OK</b>
Buttons	Click the <b>Program</b> tab
Tabs	Click <b>OK</b> under the <b>General</b> tab
Menu items, sub-menus, options	Select <b>Print</b>
	Select the option next to <b>My Cases</b>
	Select <b>New</b> from the drop-down
Text fields	Enter your name in the <b>Name</b> field
Keyboard keys	Press the <b>Enter</b> key
Boxes	Check the box next to <b>Grammar &amp; Style</b>

LISTS

Lists **do not** have periods in the entry item unless there is a period in the original text.

**NUMBERED (ORDERED)**

Use numbered lists when listing multiple items or steps. This is also referred to as an ordered list. Steps should be numbered. When providing steps, preface with 'perform the following steps':

**Example:** To locate the student, perform the following steps:

1. Copy the Individual Record Number (IRN) if available
2. Click **Inbound**
3. Paste the IRN in the Search box

**BULLETED (UNORDERED)**

Use bulleted lists when listing multiple items, or when the order of the list is irrelevant, such as a list of needed items.

**Example:** Submit the following items:

- FAFSA
- Admissions Application
- Transcripts

**Style Guide Example**

# Toolbar- Rich Text Toolbar



Use the Rich Text Toolbar for edits such as: bolding, italics, underlining, strike through, alignment, numbered and bulleted lists, and indentations.

**Note:** Do not change the format, font style, size, color, or highlighting.

Tip: Pressing the **Tab** key will move you to the next data entry field. To indent text or create a sub-bullet, click the **Indent** button.

**BOLDING**

Use bold font in sentences and lists to emphasize specific action items that are buttons, menus, tabs, etc.

**Example:**

To order a transcript, perform the following:

1. Click the **Program** tab
2. Select **Order Transcripts** under **Services**

**Style Guide Example**



The 'Services' menu is shown with the following items:

- Student Workshops
- GPA Calculator
- **Order Transcripts**

# Toolbar- Source Button



Use the **Source** button to view and edit the source code (HTML) of the article. Editing source code is not a requirement for Salesforce, but if you know how to use it, you can.

A screenshot of a Salesforce article editor interface. On the left is a sidebar with 'Article Properties' including Publishing Status (Draft), Type (Question & Answer), Article Number, Created By, Last Modified By (Jennifer Springer), Categories, Services/Processes (Programs & Courses), Roles (No Category), and Channels (Internal App, Partner, Customer, Public Knowledge Base). The main area shows 'URL Name', 'Summary', and 'Validation Status' (Not Confirmed). Below is the 'Information' section with 'Question' and 'Answer' fields. The 'Answer' field is active, showing a rich text editor toolbar with the 'Source' button highlighted. The source code in the editor is: 

```
<a href="http://www.google.com">http://www.google.com</a><br />
<br />
<br />
<a name="Section 1"></a>
```



# Toolbar- Eraser



Use the **Eraser** button to remove text formatting.

Here is an example of text pasted from a Microsoft Word document. It looks alright, but if you click the **Source** button, then you will see a lot of extra formatting that can cause problems and inconsistencies in styling.

A screenshot of a rich text editor showing the Source view of a document. The toolbar is visible at the top, and the main content area displays a list of tasks. The text is rendered in a plain, unformatted font, showing the underlying HTML structure. The tasks are:

1. Flag as a duplicate
2. Use the article targeted to your role

An internal process has changed and the article you find shows the old steps.  
What should you do?

1. Flag for review and include specifics in the feedback including a link or source for the new process information
2. Fix the article yourself
3. Use it, assuming that someone with rights will find the article and fix it

You have a question about submitting an expense report. You search the knowledge base and find an article and use it to resolve your issue. As you are working through the steps, you realize that it would be helpful for the next person to see the related company policy which you found in the Apollo Policy Library.  
What should you do?

1. Create a new related article and copy/paste the policy information
2. Flag the article for review and add feedback with a link to the policy
3. Move on to the next task on your to-do list, you found the policy so others can too.

You search for information about a specific education program. You find two articles with identical solutions but different titles.  
What should you do?

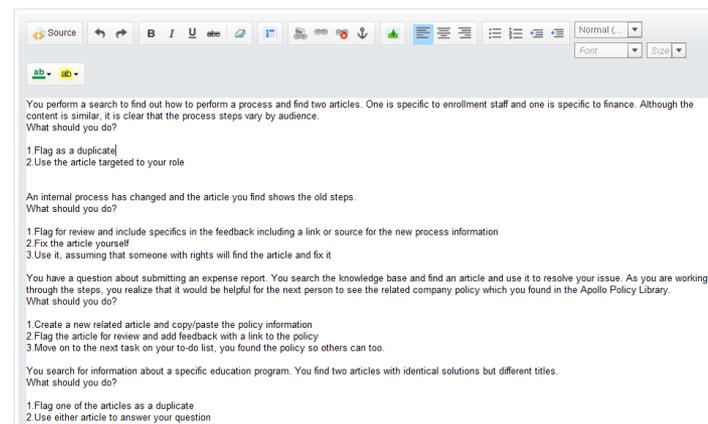
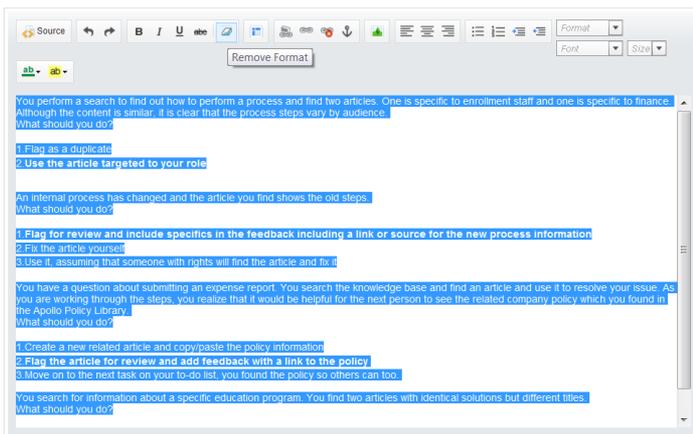
A screenshot of a rich text editor showing the Source view of a document. The toolbar is visible at the top, and the main content area displays a list of tasks. The text is rendered in a plain, unformatted font, showing the underlying HTML structure. The tasks are:

```
<span style="vertical-align: baseline; language: en-US"><span style="font-size: 10pt"><span style="color: black"><span style="font-family: arial">You perform a search to find out how to perform a process and find two articles. One is specific to enrollment staff and one is specific to finance. Although the content is similar, it is clear that the process steps vary by audience. </span></span></span></span><br /><span style="vertical-align: baseline; language: en-US"><span style="font-size: 10pt"><span style="color: black"><span style="font-family: arial">What should you do?</span></span></span></span></div style="text-align: left; margin-top: 2.4pt; text-indent: -0.25in; unicode-bidi: embed; direction: ltr; margin-bottom: 0pt; margin-left: 0.25in; word-break: normal; language: en-US; punctuation-wrap: hanging"><span style="font-size: 10pt"><span style="font-family: +mj-lt">1.</span></span><span style="vertical-align: baseline; language: en-US"><span style="font-size: 10pt"><span style="font-family: arial">Flag as a duplicate</span></span></span></div><div style="text-align: left; margin-top: 2.4pt; text-indent: -0.25in; unicode-bidi: embed; direction: ltr; margin-bottom: 0pt; margin-left: 0.25in; word-break: normal; language: en-US; punctuation-wrap: hanging"><span style="font-size: 10pt"><span style="font-family: +mj-lt">2.</span></span><span style="vertical-align: baseline; font-weight: bold; language: en-US"><span style="font-size: 10pt"><span style="color: black"><span style="font-family: arial">Use the article targeted to your role</span></span></span></span></div><br /><br /><span style="vertical-align: baseline; language: en-US"><span style="font-size: 10pt"><span style="color: black"><span style="font-family: arial">An internal process has changed and the article you find shows the old steps. </span></span></span></span><br /><span style="vertical-align: baseline; language: en-US"><span style="font-size: 10pt"><span style="color: black"><span style="font-family: arial">What should you do?</span></span></span></span><br /><div style="text-align: left; margin-top: 2.4pt; text-indent: -0.25in; unicode-bidi: embed; direction: ltr; margin-bottom: 0pt; margin-left: 0.25in; word-break: normal; language: en-US; punctuation-wrap: hanging"><span style="font-size: 10pt"><span style="font-family: +mj-lt">1.</span></span><span style="vertical-align: baseline; font-weight: bold; language: en-US"><span style="font-size: 10pt"><span style="color: black"><span style="font-family: arial">Flag for review and include specifics in the feedback including a link or
```

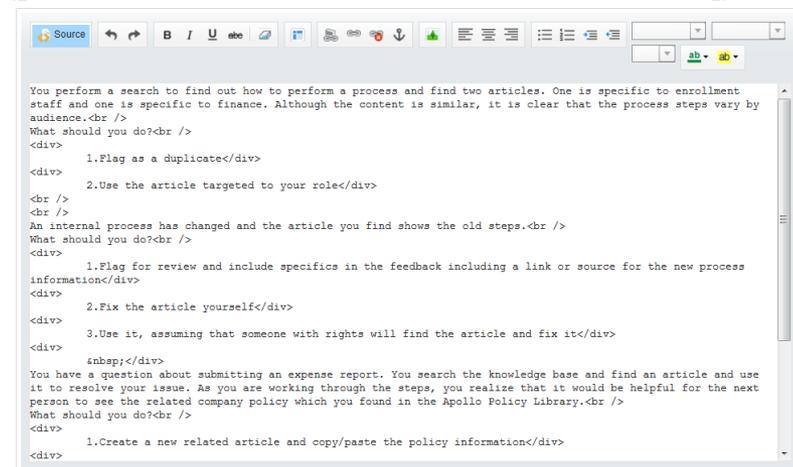
# Toolbar- Eraser cont.



When you copy and paste text from Word or another document, it is a best practice to clear the formatting by selecting the text and clicking the **Eraser** button.



Now if you click the **Source** button, you will see all the extra code has been removed.



# Toolbar- Table



Use the **Table** button to insert a table.

Table Properties

Rows	Width
<input type="text" value="3"/>	<input type="text" value="500"/>
Columns	Height
<input type="text" value="2"/>	<input type="text"/>
Headers	
<input type="text" value="None"/>	
Border size	
<input type="text" value="1"/>	
Caption	
<input type="text"/>	

OK Cancel

# Toolbar- Image



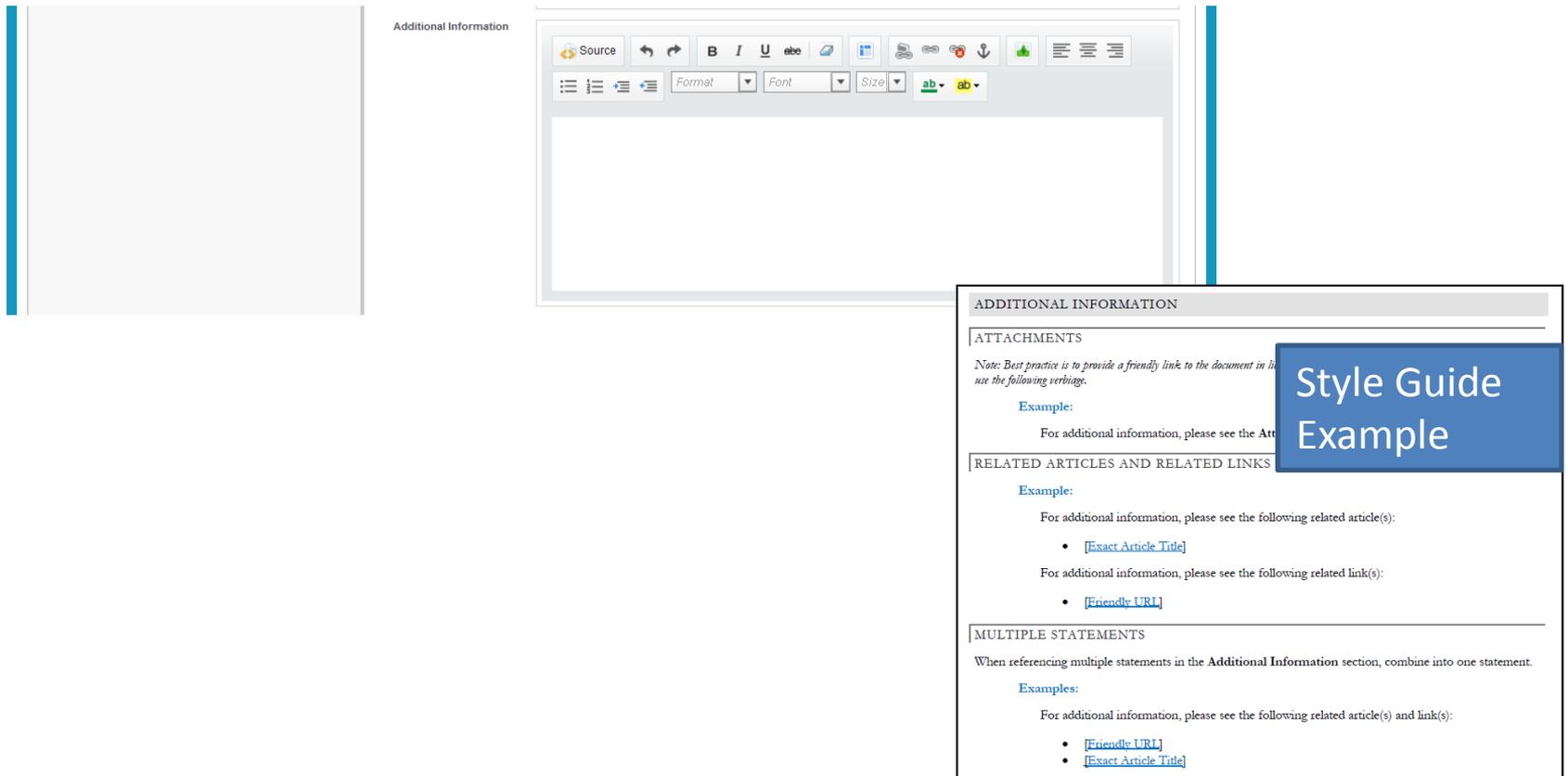
Use the **Image** button to insert an image. You have the option to upload from your computer or link to an image stored online.

A screenshot of the 'Insert Image' dialog box. The 'Upload Image' tab is selected. It features a 'Select Image' section with a text input field and a 'Browse...' button. Below this is a note: 'Maximum size 1 MB. Only png, gif or jpeg'. There is a 'Description' text area with the prompt 'Enter a description of the image for visually impaired users'. At the bottom are 'Insert' and 'Cancel' buttons.A screenshot of the 'Insert Image' dialog box. The 'Web Address' tab is selected. It features a 'URL' text input field with an example: 'http://www.mysite.com/myimage.jpg'. Below this is a 'Description' text area with the prompt 'Enter a description of the image for visually impaired users'. At the bottom are 'Insert' and 'Cancel' buttons.

Only insert images when they add clarity to the article.

# Additional Information

Enter any **Additional Information** (links to other articles, websites, or general information that pertains to the subject but not directly an answer to the question).



The image shows a text editor interface with a toolbar and a text area. The text area is labeled "Additional Information". To the right, a style guide example is shown, detailing the format for additional information.

**Additional Information**

Source

Format Font Size

**ADDITIONAL INFORMATION**

**ATTACHMENTS**

*Note: Best practice is to provide a friendly link to the document in lieu of the following verbiage.*

**Example:**

For additional information, please see the Attachment(s):

**RELATED ARTICLES AND RELATED LINKS**

**Example:**

For additional information, please see the following related article(s):

- [\[Exact Article Title\]](#)

For additional information, please see the following related link(s):

- [\[Friendly URL\]](#)

**MULTIPLE STATEMENTS**

When referencing multiple statements in the **Additional Information** section, combine into one statement.

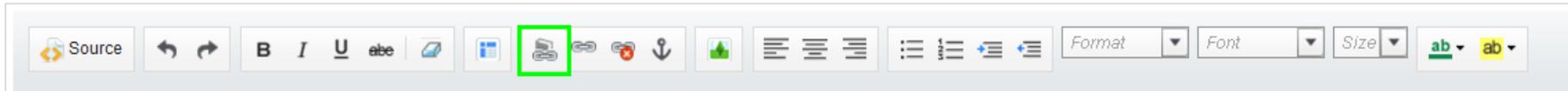
**Examples:**

For additional information, please see the following related article(s) and link(s):

- [\[Friendly URL\]](#)
- [\[Exact Article Title\]](#)

**Style Guide Example**

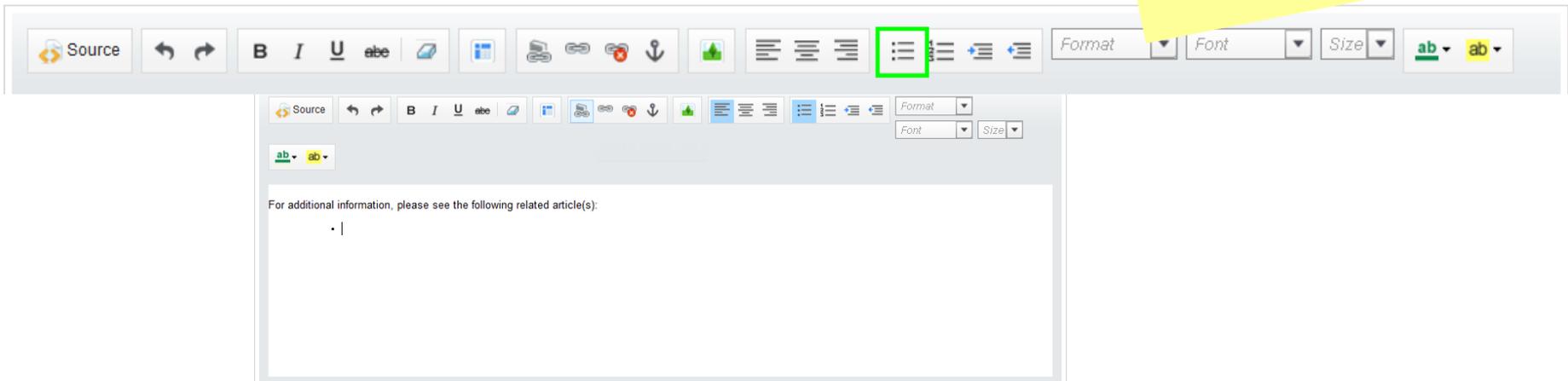
# Smart Link



When appropriate, link articles to related articles to help others find additional relevant information:

1. Identify the related articles through a typical search
2. Add the **Additional Information** clause, “For additional information, please see the following related article(s):”
3. Click the **Bullet** button
4. Click the **Smart Link** button

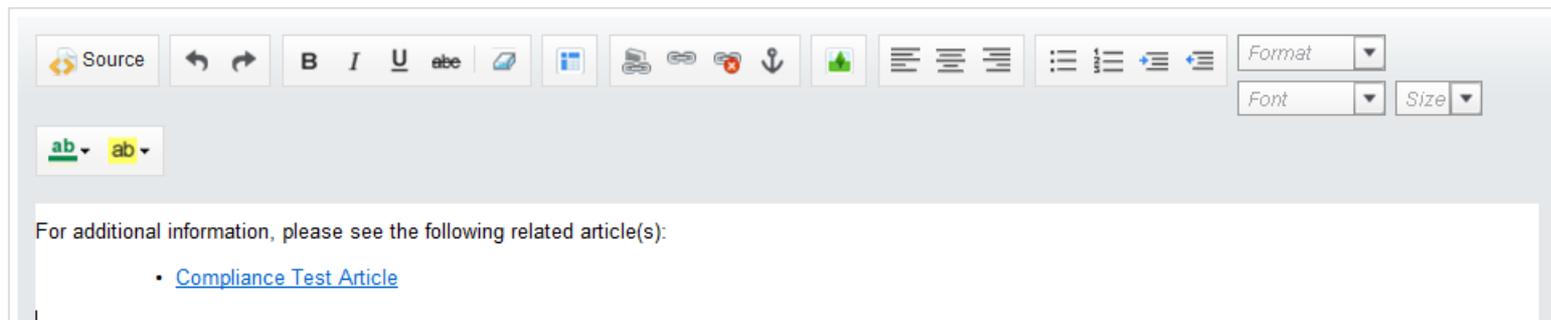
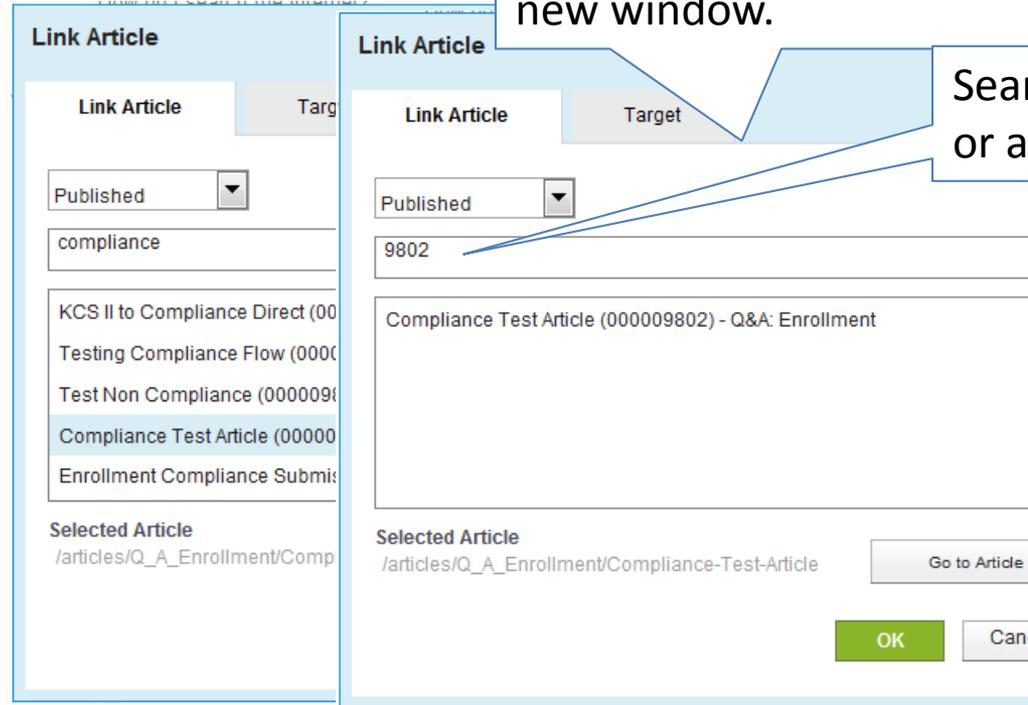
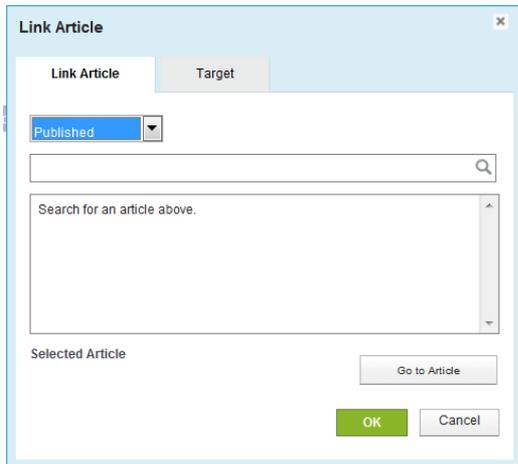
Use a Smart Link to add related articles.



# Smart Link- continued

You can leave the **Target** tab alone, by default links open in new window.

5. Search for the article
6. Select the desired article
7. Click **OK**



# Link - Friendly URL

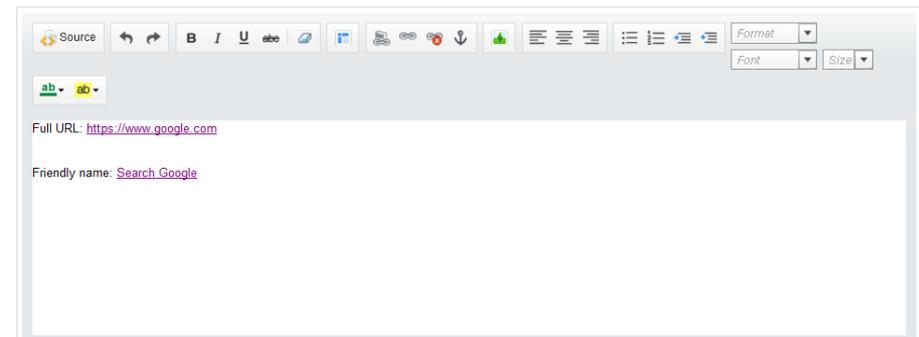
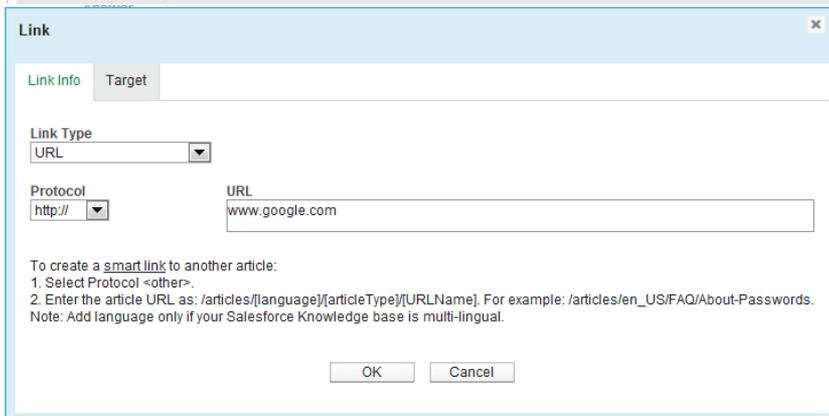
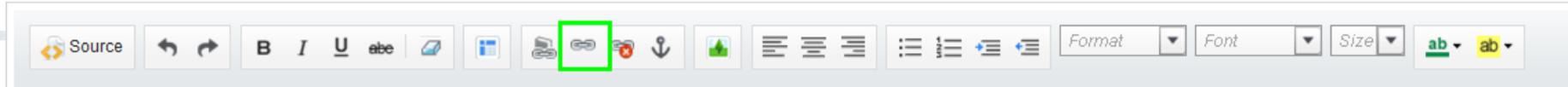
Internal site? Link with a Friendly URL

External/Student-facing site? Link with full URL  
Example: Directing to Phoenix.edu

## Linking to a Resource

Friendly URL Name

1. Type a friendly description
2. Select the description
3. Click the **Link** button
4. Type the full web address in the URL field
5. Click **OK**





# Link - Full URL

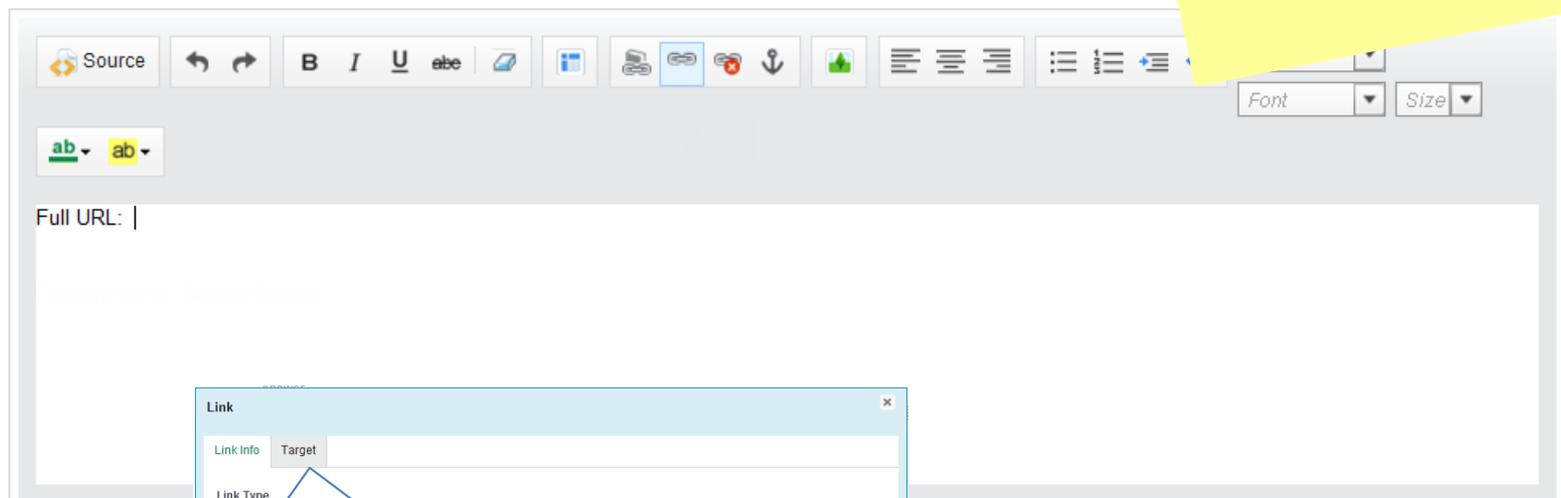
## Linking to a Resource

Full URL

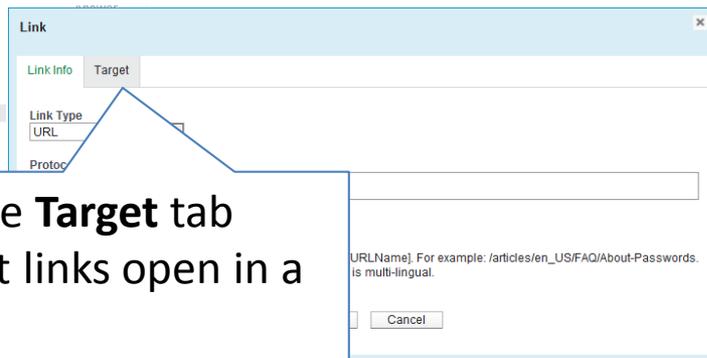
1. Click the **Link** button
2. Type the full web address in the URL field
3. Click **OK**

Internal site? Link with a friendly URL

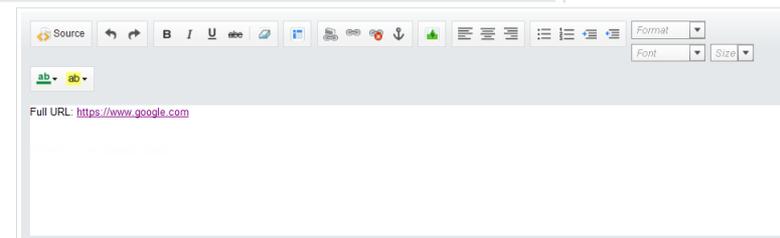
External/Student-facing site? Link with full URL



Full URL: |

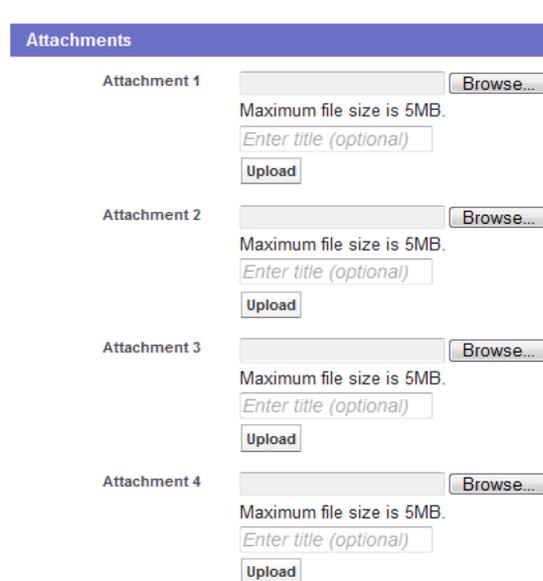


You can leave the **Target** tab alone, by default links open in a new window.



# Attachments

Up to four attachments with a maximum size of 5MB can be added to an article in the attachments section.



The screenshot displays the 'Attachments' section of a user interface. It features a blue header with the text 'Attachments'. Below the header, there are four identical attachment slots, labeled 'Attachment 1' through 'Attachment 4'. Each slot contains a file selection button labeled 'Browse...', a text input field for a title with the placeholder text 'Enter title (optional)', and an 'Upload' button. A message 'Maximum file size is 5MB.' is displayed above each title field.

**Tip:**  
Add the Additional Information Clause to the Answer field. "For additional information, please see the Attachments section."

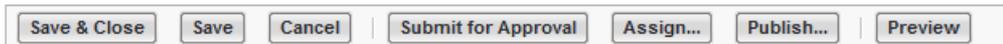
**Best Practice:** When possible, link to existing content resources (policies, websites, manuals) rather than copying the information into the article or attaching as a document. This practice ensures that when the attachment is updated or versioned our knowledge articles stay accurate and relevant.

# Compliance Article

Certain article topics of increased sensitivity require compliance approval.

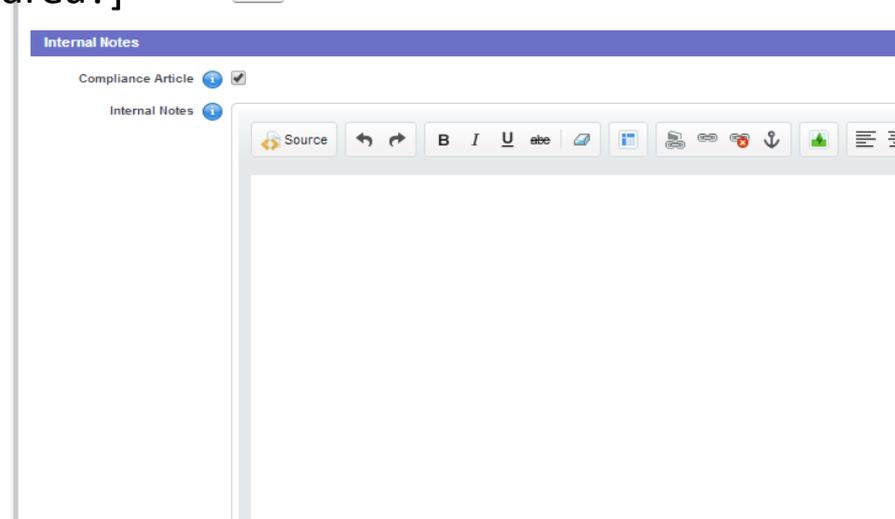
When creating a compliance risk article, perform the following:

1. Check the box next to **Compliance Article**
2. Click **Submit for Approval** when finished with the article



**Note:** Article will not be available to others until approval is received

You can view the status of the approval at the bottom of the article. [EKM-Can I get a screenshot of this status area?]



# Compliance Topics

To view a suggested list of topics that require approval from Apollo Ethics & Compliance, go to the Salesforce **Knowledge** tab and search for article # **8382** titled **Compliance Misrepresentation Legal Topics**.

To avoid manually checking this article for updates click the follow button, notifications automatically

**Best Practice:**  
Follow the article to receive notifications when the article is updated.

The screenshot shows the Salesforce Knowledge interface. At the top, there's a search bar and navigation tabs for Home, Knowledge, Q&A, Cases, Ideas, Questions, and Dashboards. The article title is 'Compliance Misrepresentation Legal Topics'. Below the title, there are options to 'Show Feed', 'Following', and 'Rate This Article'. The article details include 'First Published' (10/7/2013 9:41 AM), 'Last Modified' (1/31/2014 3:37 PM), 'Last Published' (1/31/2014 3:37 PM), 'Article Audience' (Services/Processes: Business Policy, Roles: All), 'Article Number' (000008382), and 'Validation Status' (Confirmed). A 'Follow' button is visible in the top right corner of the article content area.

« Back to Knowledge Search

**Information** | Role Centric | Attachments

**Question** Where do I find information on compliance and misrepresentation topics?

**Answer** Topics covered by the U.S. Department of Education's Misrepresentation provision include, but are not limited to the topics on the [Compliance/Misrep/Legal Topic List](#). Please refer to the [UOPX - Misrepresentation Master List of Subject Matter Experts](#) for additional information.

**Note:** If you receive an **Access Denied** error message accessing the Master SME List, simply click **Request access** and Apollo Ethics and Compliance will process your request.

**Additional Information** There is no additional information.



#### FERPA - Family Educational Rights and Privacy Act

- FERPA Release
- FERPA Hold
- FERPA Rescind
- Student Verification Process
- Third Party contact
- Implied Consent
- Student History Notes

#### ADA - Americans with Disabilities Act

- ADA
- ADA referrals
- ADA qualifications
- ADA accommodations

#### Do Not Call

- DNC regulations
- DNC callable times
- DNC phone number reactivation

#### Internal Do Not Call

- DNC phone number suppression
- DNC phone number reactivation

#### Privacy

- Privacy Policy
- Opt-Out
- Email Suppression
- Email Un-suppression
- PII personally identifiable information

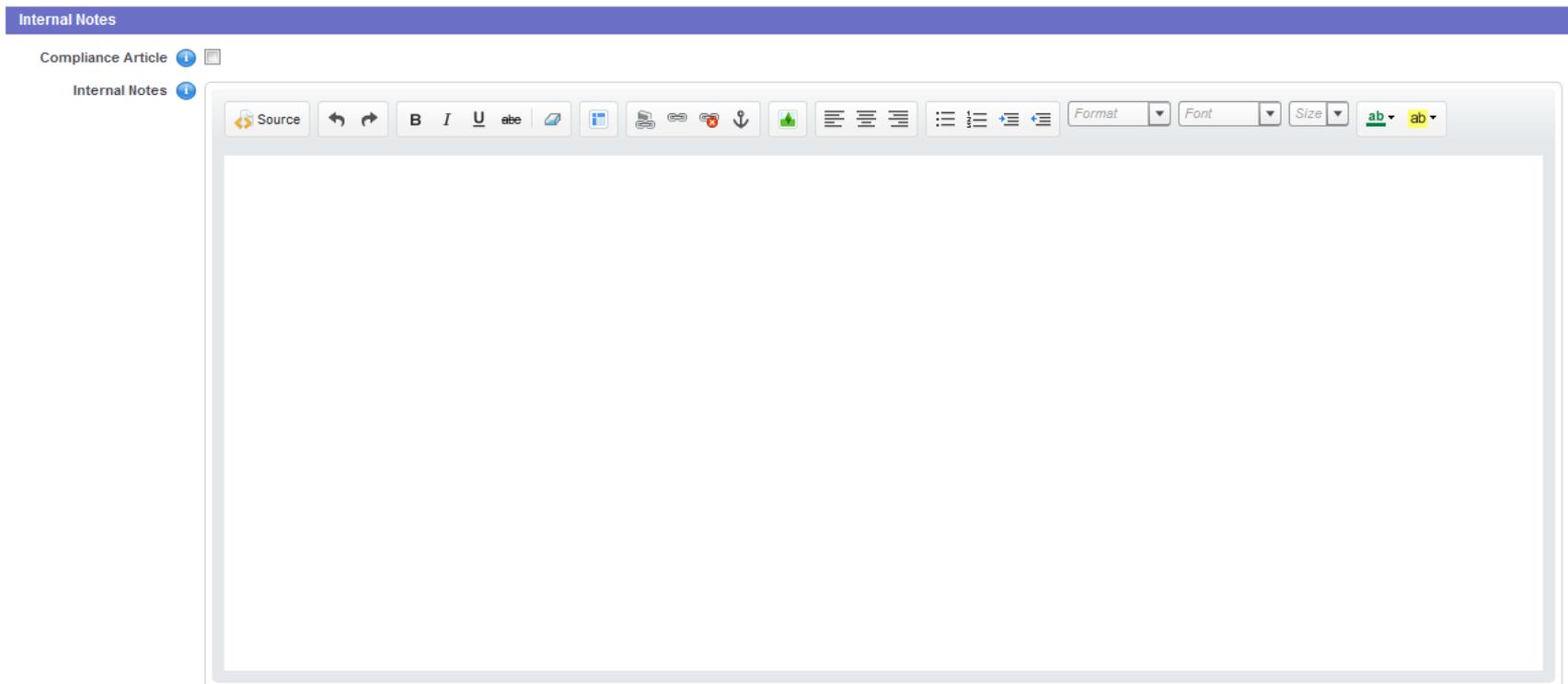
#### AEC Required Trainings

- Ethics and Compliance Concern
- Reporting Identity Theft
- Reporting Financial Aid Fraud
- Report Cheating
- Report Title 9 concerns

# Knowledge Source

Indicate the source of information in the **Internal Notes** field.

Providing a link to existing resources or listing the person the information was obtained from makes it easier to validate the article, and confirm any suggested future updates.



# Select Data Categories

## Roles

As we are in an everyone-sees-everything model, selecting a role will help narrow your search results.

## Services/Processes

Articles can also be filtered by **Services/Processes** categories such as **Programs & Courses** to narrow search results to articles that apply to the chosen category.

An article may be assigned none or multiple data categories, if you do add a category, then limit it to 1 or 2 selections.

You can expect the data categories to change with the organization as more groups start using the tool.

The screenshot displays the 'Article Edit' interface for a 'New Article'. The interface is divided into several sections:

- Article Assignment:** Contains fields for 'Assigned To' (Jennifer Springer), 'Assigned By' (Jennifer Springer), 'Instructions' (--), and 'Assignment Due Date' (--).
- Article Properties:** Contains fields for 'Publishing Status' (Draft), 'Type' (Question & Answer), 'Article Number', 'Created By', and 'Last Modified By' (Jennifer Springer).
- Categories:** A section with a table-like structure showing 'Services/Processes' set to 'No Category' and 'Roles' set to 'No Category', each with an 'Edit' button.
- Channels:** A list of checkboxes for 'Internal App' (checked), 'Partner', 'Customer', and 'Public Knowledge Base'.

At the top of the interface, there are buttons for 'Save & Close', 'Save', 'Cancel', and 'Assign...'.

# Services/Processes Data Category

Select the appropriate **Services/Processes** data category and click the **Add** button. Once you are done selecting categories, click **OK** to save. If you are unsure of which category is applicable, then do not select a category and a KCS II will complete this while confirming the article.

The image displays two screenshots of a Salesforce interface, illustrating the process of selecting data categories for an article.

**Left Screenshot:** The dialog box shows the "Available Categories" list on the left and the "Selected Categories" list on the right. The "Available Categories" list includes:

- All
- Business Support
- Contact Information
- Student Support
- Financial Support
- Potential & New Student
- Academic Progression
- Programs & Courses** (highlighted)
- Campus Information
- Services & Tools
- Issue Management
- Policy
- Forms

The "Selected Categories" list is currently empty. The "Add >" button is visible next to the "Available Categories" list, and the "< Remove" button is visible next to the "Selected Categories" list. The "OK" and "Cancel" buttons are at the bottom.

**Right Screenshot:** The dialog box shows the "Available Categories" list on the left and the "Selected Categories" list on the right. The "Available Categories" list is the same as in the left screenshot. The "Selected Categories" list now contains:

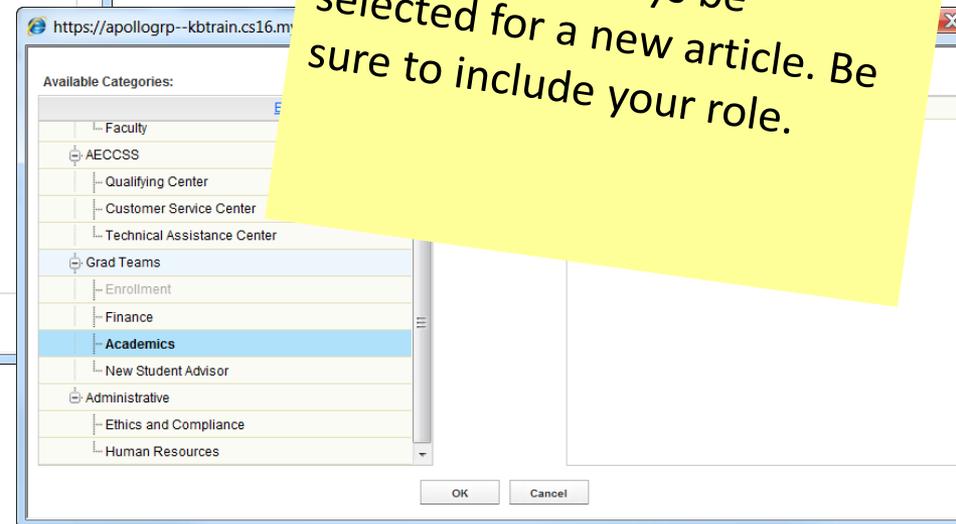
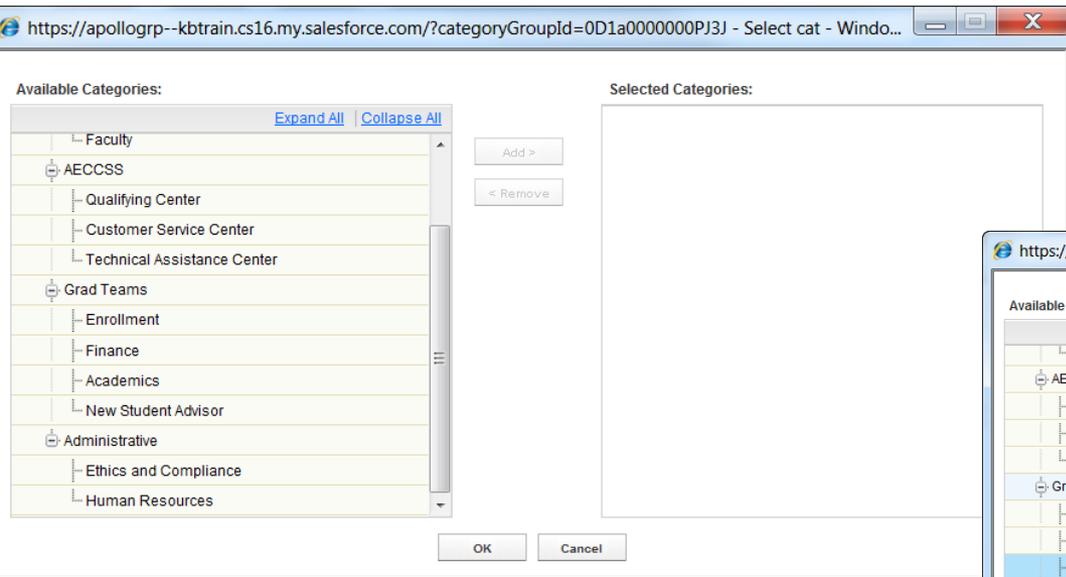
- > Student Support > Programs & Courses

The "Add >" button is now disabled, and the "< Remove" button is active. The "OK" and "Cancel" buttons are at the bottom.

# Roles data category

Select the appropriate **Roles** data category and click the **Add** button. Once you are done selecting categories, click **OK** to save.

As a KCS I Candidate you would typically only select your own **Role** unless you know for certain that it applies to others.



**Best Practice**  
A role must always be selected for a new article. Be sure to include your role.

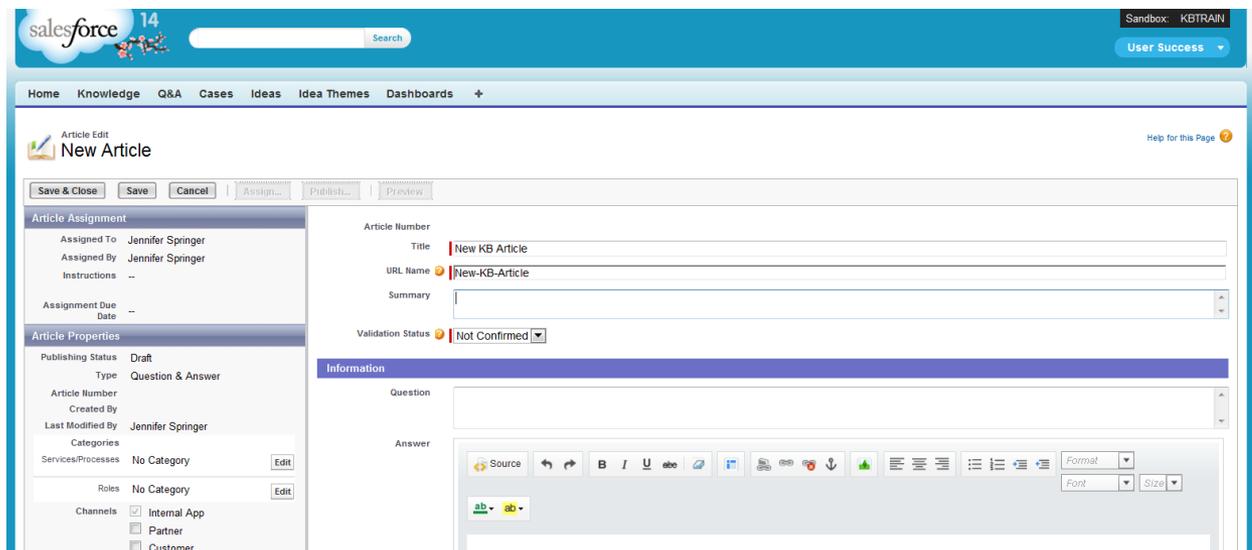


# Save a Draft Article

When you are drafting a new article, you have two save options.

Click the **Save** button to save your progress and continue editing. You need to save at least once before the **Publish** button will be available.

Click the **Save & Close** button to save an article draft to work on later.

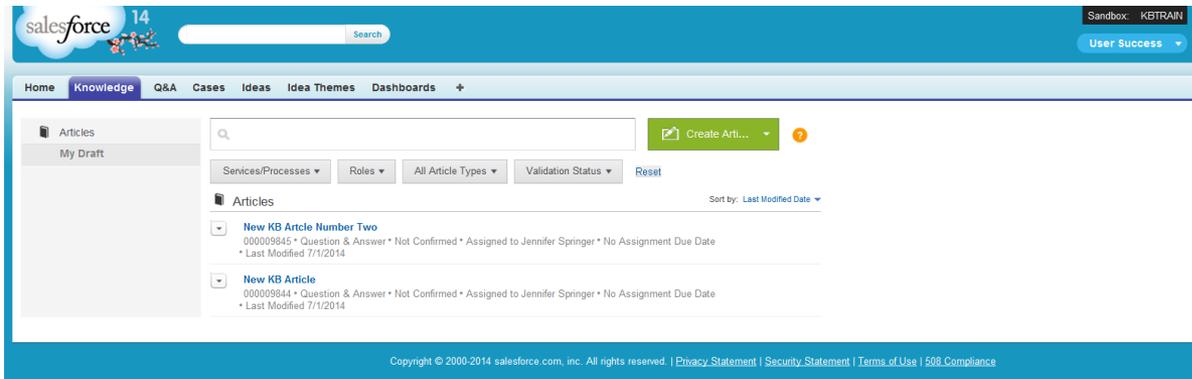


Success! "Article Title" has been saved as a draft.

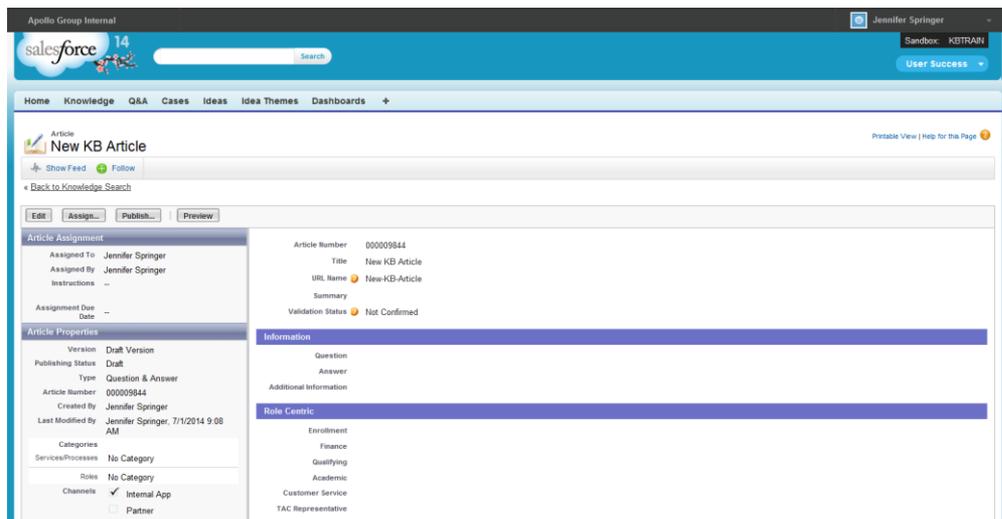


# View Draft Articles

Click the **My Draft** link to access your articles that are a work in progress.



Click one of the article links to open the draft.



# Edit Draft Article

**Edit****Assign...****Publish...****Preview**

Click the **Edit** button to continue working on the article information.

The screenshot shows the Salesforce Knowledge 'New KB Article' edit page. The top navigation bar includes 'Apollo Group Internal', the user 'Jennifer Springer', and a search bar. The main navigation menu contains 'Home', 'Knowledge', 'Q&A', 'Cases', 'Ideas', 'Idea Themes', and 'Dashboards'. The page title is 'Article Edit' and 'New KB Article'. The left sidebar contains 'Article Assignment' and 'Article Properties' sections. The main content area includes fields for 'Article Number', 'Title', 'URL Name', 'Summary', and 'Validation Status'. The 'Information' section is partially visible at the bottom.

**Article Assignment**

Assigned To	Jennifer Springer
Assigned By	Jennifer Springer
Instructions	--
Assignment Due Date	--

**Article Properties**

Publishing Status	Draft
Type	Question & Answer
Article Number	000009844
Created By	Jennifer Springer
Last Modified By	Jennifer Springer, 7/1/2014 9:08 AM
Categories	No Category <a href="#">Edit</a>
Roles	No Category <a href="#">Edit</a>
Channels	<input checked="" type="checkbox"/> Internal App <input type="checkbox"/> Partner <input type="checkbox"/> Customer <input type="checkbox"/> Public Knowledge Base

**Article Information**

Article Number: 000009844

Title:

URL Name:

Summary:

Validation Status:

**Information**

Question:

Answer:

Rich text editor toolbar: Source, Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Format, Font, Size.

# Preview Draft Article



Click the **Preview** button to see how the article will appear when it is published.

Preview Article Type: Question & Answer Help for this Page ?

Channel:

---

 **New KB Article** Printable View | Help for this Page ?

[Show Properties](#)

**Information** | Role Centric | Attachments | Administrative

Question	How do I search the internet?
Answer	Full URL: <a href="https://www.google.com">https://www.google.com</a>
	Friendly name: <a href="#">Search Google</a>

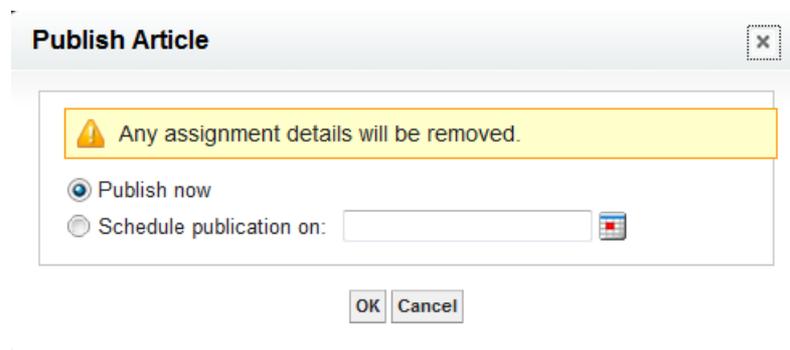
Additional Information

# Publish Draft Article



Once you have completed the article, you must publish it to make it available in search results. **Note:** You will not be able to edit the article after it is published.

Click the **Publish** button when the article is ready. Select the option next to **Publish now** or select a date for future publication and click **OK**.



**Note:** The **Publish** button is specific to Salesforce and does not indicate a KCS III Publisher has made the content visible for self-service.

# 6. Review

Start Learning Button

Media Type

## Knowledge Check

If you search the Knowledge tab and get too many results, then what should you do?

- a. **Narrow the results by selecting filters**
- b. Search Q&A

If you search the Knowledge tab and get no results, then what should you do?

- a. Clear any selected filters and search again
- b. Search Q&A
- c. Refine search terms using both laymen and industry terms
- d. **A first, C second, then B if no results**

**Matching drag/drop**

- a. Searching from the (Knowledge tab) allows you to filter for more refined results, provide feedback, follow articles, and see properties like version and modification date.
- b. Searching from the (Q&A) tab shows you all answers from Q&A and matching knowledge articles.

**Media Type**

## Knowledge Check

Question – multi-response

What should be included in article feedback to ensure that an employee licensed to fix articles is able to verify information and make updates when notified that the article needs review?

- a. #feedback
- b. Details about what needs to be modified or added
- c. Source of the information

All are correct

Correct: Article feedback should start with #feedback and include specific details about what needs to be updated and the source for the updated information.



**Additional Notes & Questions**

eDev: Present each topic and allow the learner to select the correct image. Green are Compliance Articles, red are not Compliance Articles. Randomize the topic order, let's discuss presentation options? Drag and drop, matching, etc?

The attached document needs to be a resource the learner can open in the tutorial.

**Media Type**

To view the topics that require approval from the Compliance department, search Salesforce for knowledge article # **8382** titled **Compliance Misrepresentation Legal Topics**.

Using the information in the knowledge article, determine which of the following topics should be marked as a Compliance Article.

- § How to reactivate a phone number listed on the iDNC list?
- § How do you gain Implied Consent on a call with a student?

- § Who is my Campus Security Authority (CSA)?
- § Why would there be a hold on a student's transcript?

Compliance Article  

Compliance Article  

Publish...

Submit for Approval

- a) Correct! Once the article is created, this topic should be marked as a Compliance article and sent to Compliance for review by clicking the Submit for Approval button.
- b) Incorrect! According to the Compliance Misrepresentation Legal Topics, this article would not require Compliance approval before publishing.

# Knowledge Check

Compliance risk



**FERPA - Family Educational Rights and Privacy Act**

- FERPA Release
- FERPA Hold
- FERPA Rescind
- Student Verification Process
- Third Party contact
- Implied Consent
- Student History Notes

**ADA - Americans with Disabilities Act**

- ADA
- ADA referrals
- ADA qualifications
- ADA accommodations

**Do Not Call**

- DNC regulations
- DNC callable times
- DNC phone number reactivation

**Internal Do Not Call**

- iDNC phone number suppression
- iDNC phone number reactivation

**Privacy**

- Privacy Policy
- Opt-Out
- Email Suppression
- Email Un-suppression
- PII personally identifiable information

**AEC Required Trainings**

**Ethics and Compliance Concern**

- Reporting Identity Theft
- Reporting Financial Aid Fraud
- Report Cheating
- Report Title 9 concerns

**Media Type**

Scenario/Matching activity

Scenario

1. You write an article regarding an email communication about a new project.
2. You write an article regarding a new compliance policy located in the Apollo Policy Library.
3. You write an article navigating users to a new tool that is difficult to find.
4. You write an article regarding a daily process used by multiple roles.

Action

1. Attach supporting documents
2. Link to supporting documents
3. Upload supporting images
4. Add keywords including both industrial and laymen's terms

## Knowledge Check

To take other KCS Methodology and tool modules, log into **MyLearning** and search for **Enterprise Knowledge Management Series**.

To learn more about the KCS Methodology, visit the **Consortium for Service Innovation**:

<http://www.serviceinnovation.org/kcs/>

To learn more about Q&A and other support features, review the **User Success Overview**. <http://newsource/Learning/Library/Permalink/C13-3933-E1.aspx>

# Conclusion & Next Steps

Congratulations, you have completed the tutorial portion of this course. In this course, you have learned

To receive completion credit for this learning experience, you must close this window and successfully complete the accompanying

## To complete the assessment now:

1. Close this tutorial window.
2. Click the **Return to Activity Progress** link on View Progress screen. \_\_\_\_\_
3. Click the \_\_\_\_\_ assessment link on the Activity Progress screen.

## To complete this at a later time:

Open **My Learning Self-Service>Learning>All Learning** and launch the assessment from your All Learning Activities screen.

Your feedback on this class and all others ensures continuous improvement of the courses we develop and deliver. Please take a moment to click the course survey link on your Activity Progress page to complete a short survey and provide your feedback.