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.

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”.

Additional Notes & Questions

1. Introduction

Start Learning Button

1. Introduction

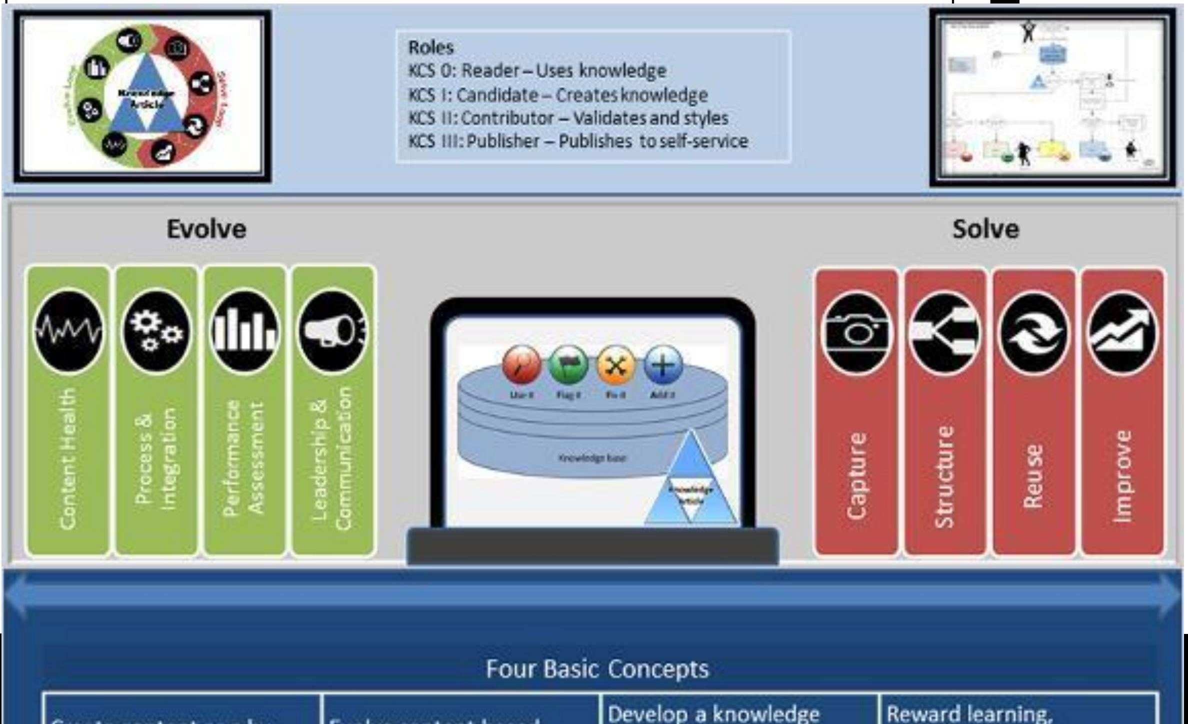
- Introduction
- KCS Methodology review
- KCS I Candidate Role review

Slide

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)

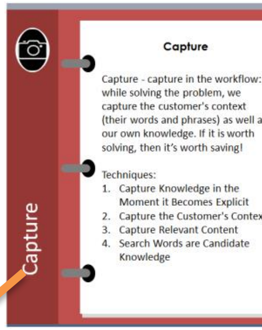


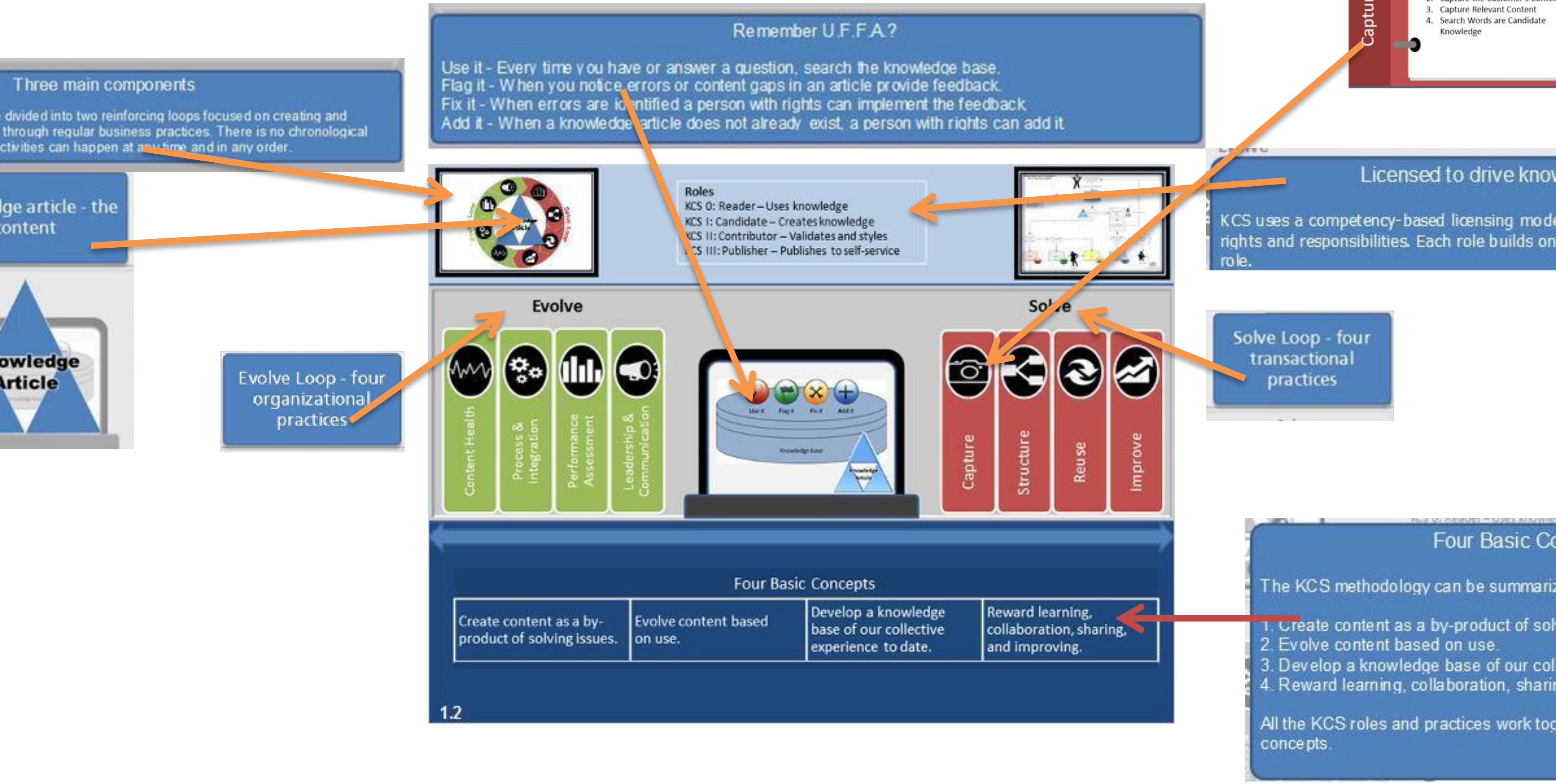
Additional Notes & Questions

Slide

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.]





Slide 2.1

1. Introduction

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

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

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

Use it

Flag it

Add it

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

Start Learning Button

2. Use It

Additional Notes & Questions

Start Learning Button

Slide 2.1

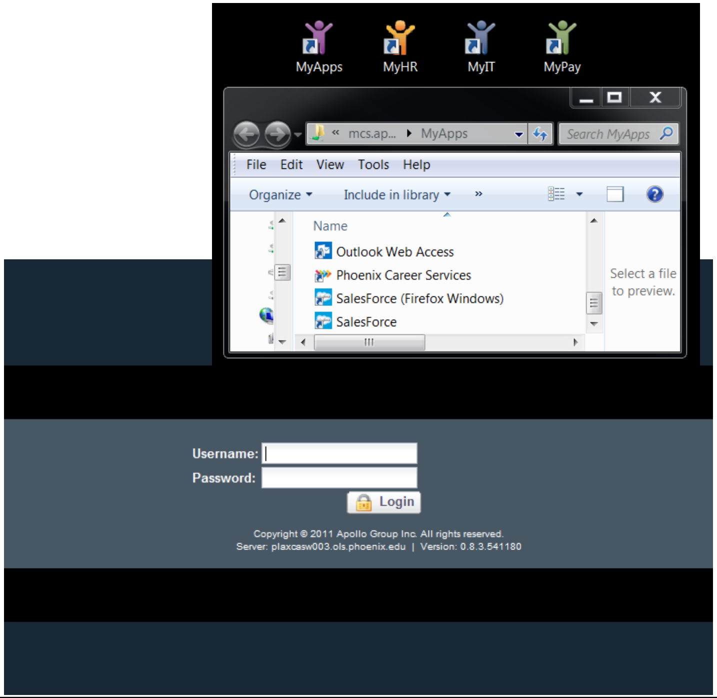
2. Use It

- **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

2. Use It

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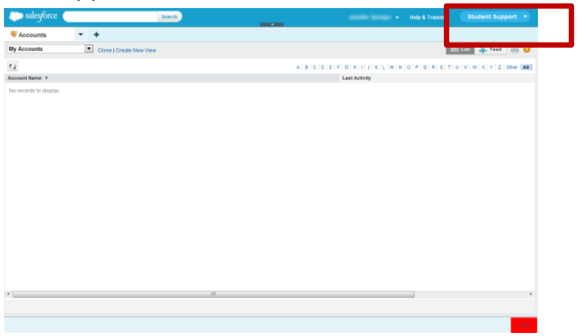
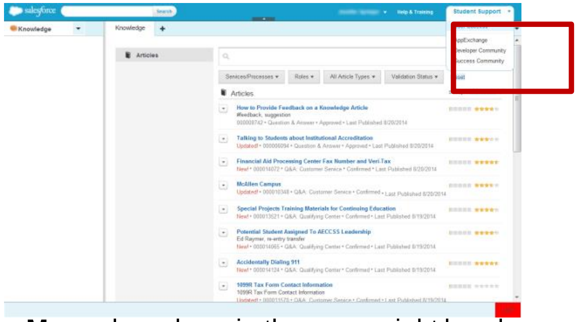
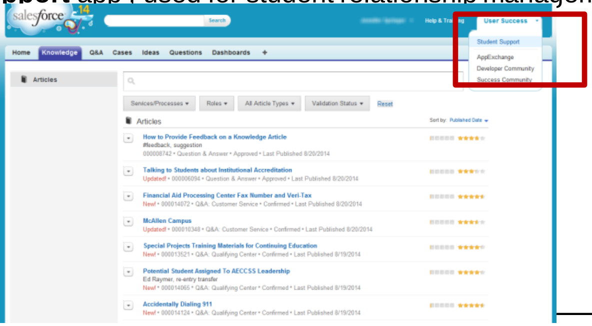
In the upper-right corner of the screen is the **App Menu** for navigating between Salesforce applications.



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

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- **Access the knowledge base**
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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)

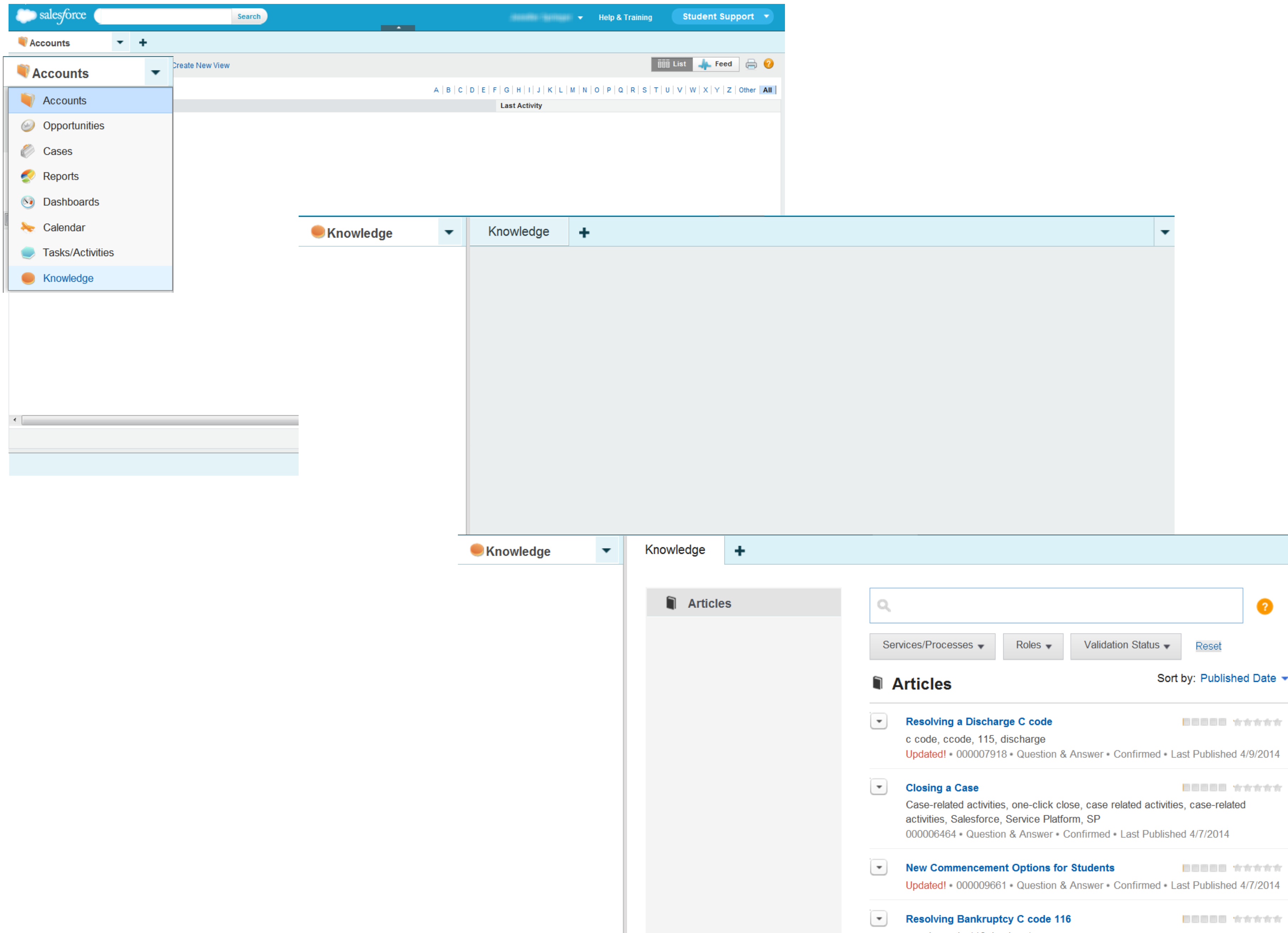
Global Search

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.

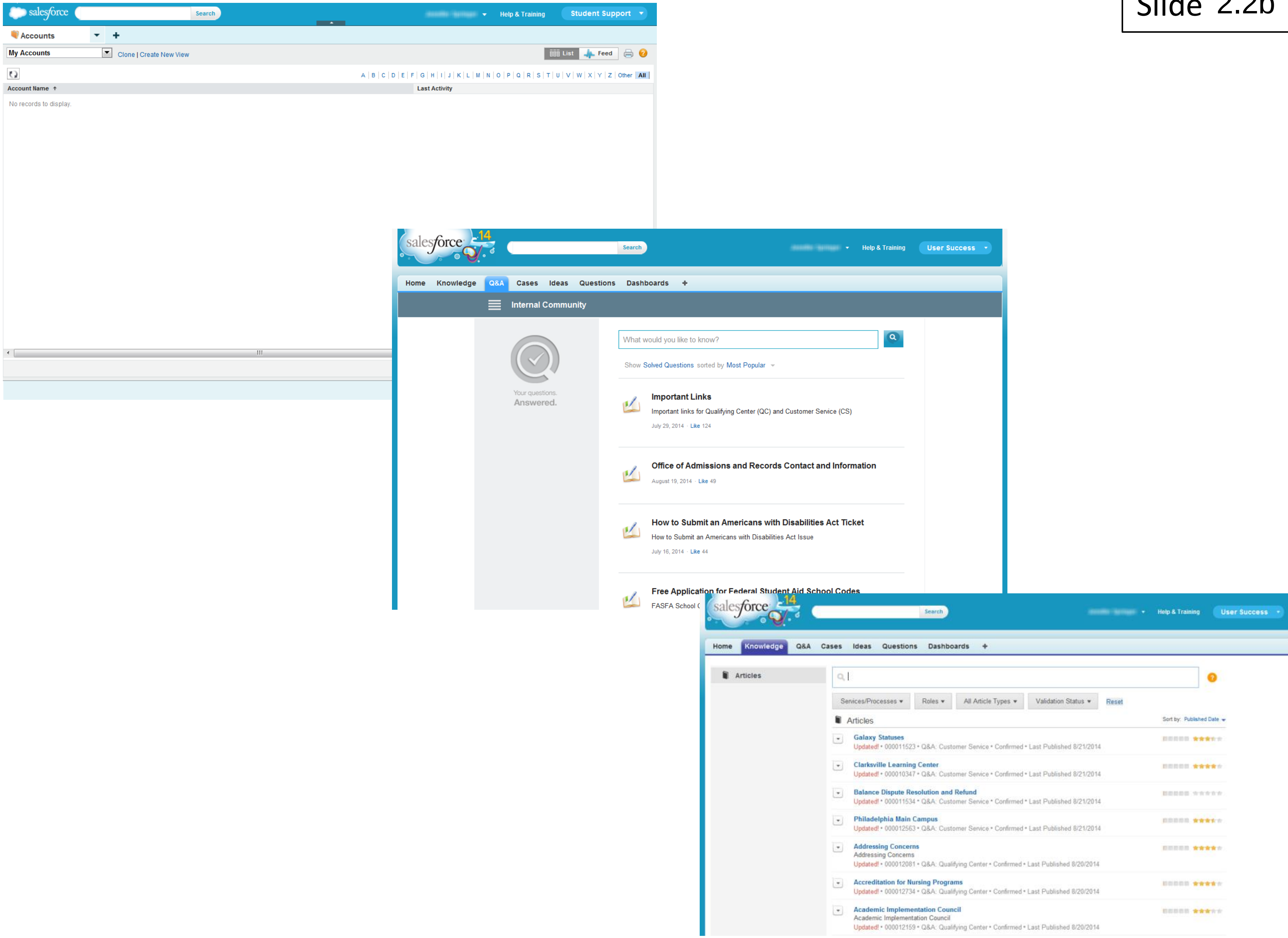
(image 2.2c)

Additional Notes & Questions

Slide 2.2a

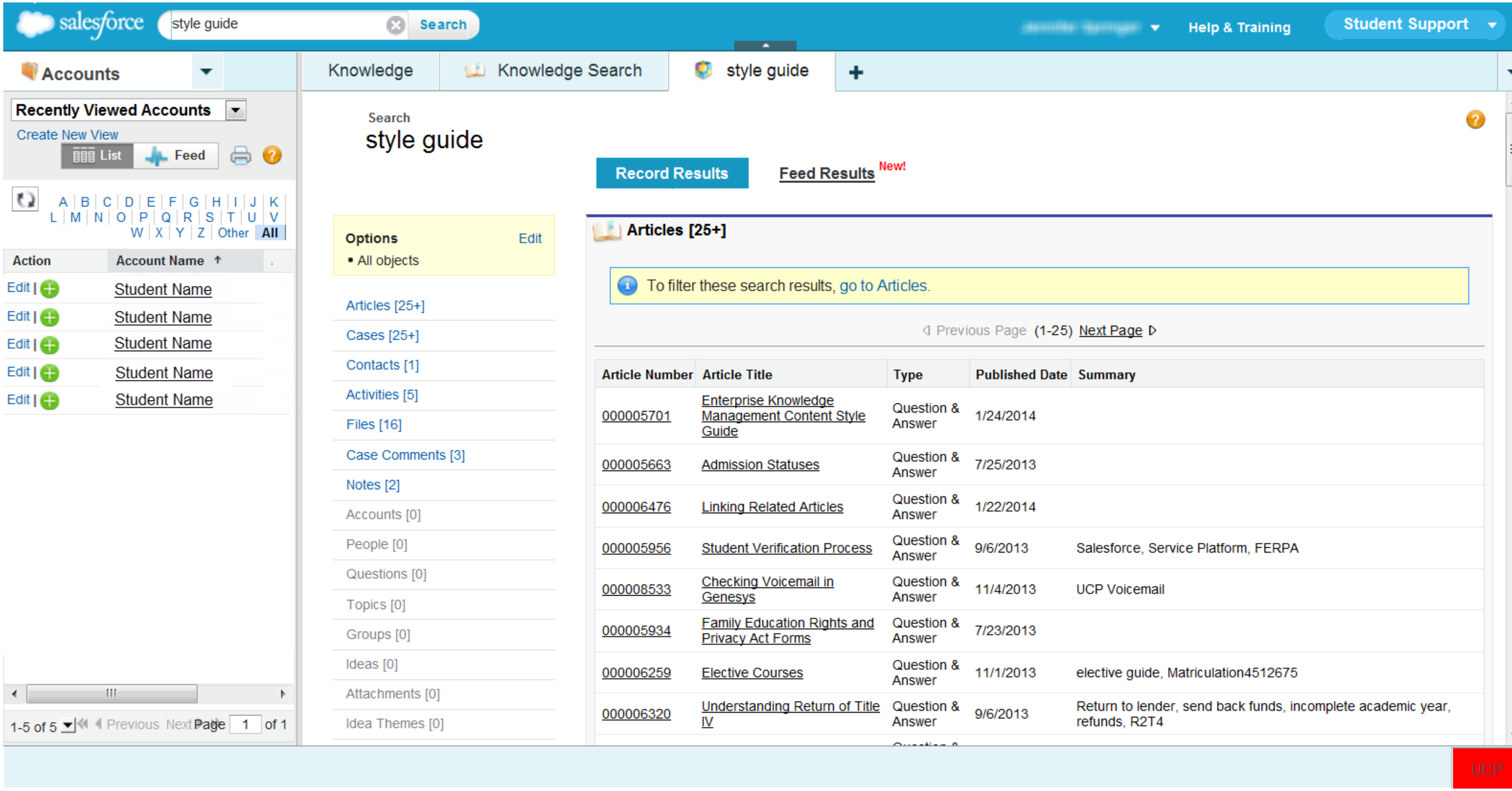

salesforce
Search
Help & Training
Student Support
Accounts
Create New View
List
Feed
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Last Activity
Accounts
Accounts
Opportunities
Cases
Reports
Dashboards
Calendar
Tasks/Activities
Knowledge
Knowledge
Knowledge
Knowledge
Knowledge
Articles
Services/Processes
Roles
Validation Status
Reset
Articles
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

Slide 2.2b



salesforce
Search
Help & Training
Student Support
Accounts
My Accounts
Clone | 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
Account Name
Last Activity
No records to display.
salesforce 14
Search
Help & Training
User Success
Home Knowledge Q&A Cases Ideas Questions Dashboards +
Internal Community
What would you like to know?
Your questions. Answered.
Show Solved Questions sorted by Most Popular
Important Links
Important links for Qualifying Center (QC) and Customer Service (CS)
July 29, 2014 · Like 124
Office of Admissions and Records Contact and Information
August 19, 2014 · Like 49
How to Submit an Americans with Disabilities Act Ticket
How to Submit an Americans with Disabilities Act Issue
July 16, 2014 · Like 44
Free Application for Federal Student Aid School Codes
FASFA School C
salesforce 14
Search
Help & Training
User Success
Home Knowledge Q&A Cases Ideas Questions Dashboards +
Articles
Services/Processes
Roles
All Article Types
Validation Status
Reset
Articles
Sort by: Published Date
Galaxy Statuses
Updated! • 000011523 • Q&A: Customer Service • Confirmed • Last Published 8/21/2014
Clarksville Learning Center
Updated! • 000010347 • Q&A: Customer Service • Confirmed • Last Published 8/21/2014
Balance Dispute Resolution and Refund
Updated! • 000011534 • Q&A: Customer Service • Confirmed • Last Published 8/21/2014
Philadelphia Main Campus
Updated! • 000012563 • Q&A: Customer Service • Confirmed • Last Published 8/21/2014
Addressing Concerns
Addressing Concerns
Updated! • 000012081 • Q&A: Qualifying Center • Confirmed • Last Published 8/20/2014
Accreditation for Nursing Programs
Updated! • 000012734 • Q&A: Qualifying Center • Confirmed • Last Published 8/20/2014
Academic Implementation Council
Academic Implementation Council
Updated! • 000012159 • Q&A: Qualifying Center • Confirmed • Last Published 8/20/2014

Slide 2.2c


salesforce
style guide
Search
Help & Training
Student Support
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
1-5 of 5
Previous Next Page 1 of 1
Search
style guide
Record Results
Feed Results New!
Options Edit
• 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]
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 | Enterprise Knowledge Management Content Style Guide | Question & Answer | 1/24/2014
000005663 | Admission Statuses | Question & Answer | 7/25/2013
000006476 | Linking Related Articles | Question & Answer | 1/22/2014
000005956 | Student Verification Process | Question & Answer | 9/6/2013 | Salesforce, Service Platform, FERPA
000008533 | Checking Voicemail in Genesys | Question & Answer | 11/4/2013 | UCP Voicemail
000005934 | Family Education Rights and Privacy Act Forms | Question & Answer | 7/23/2013
000006259 | Elective Courses | Question & Answer | 11/1/2013 | elective guide, Matriculation4512675
000006320 | Understanding Return of Title IV | Question & Answer | 9/6/2013 | Return to lender, send back funds, incomplete academic year, refunds, R2T4
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)

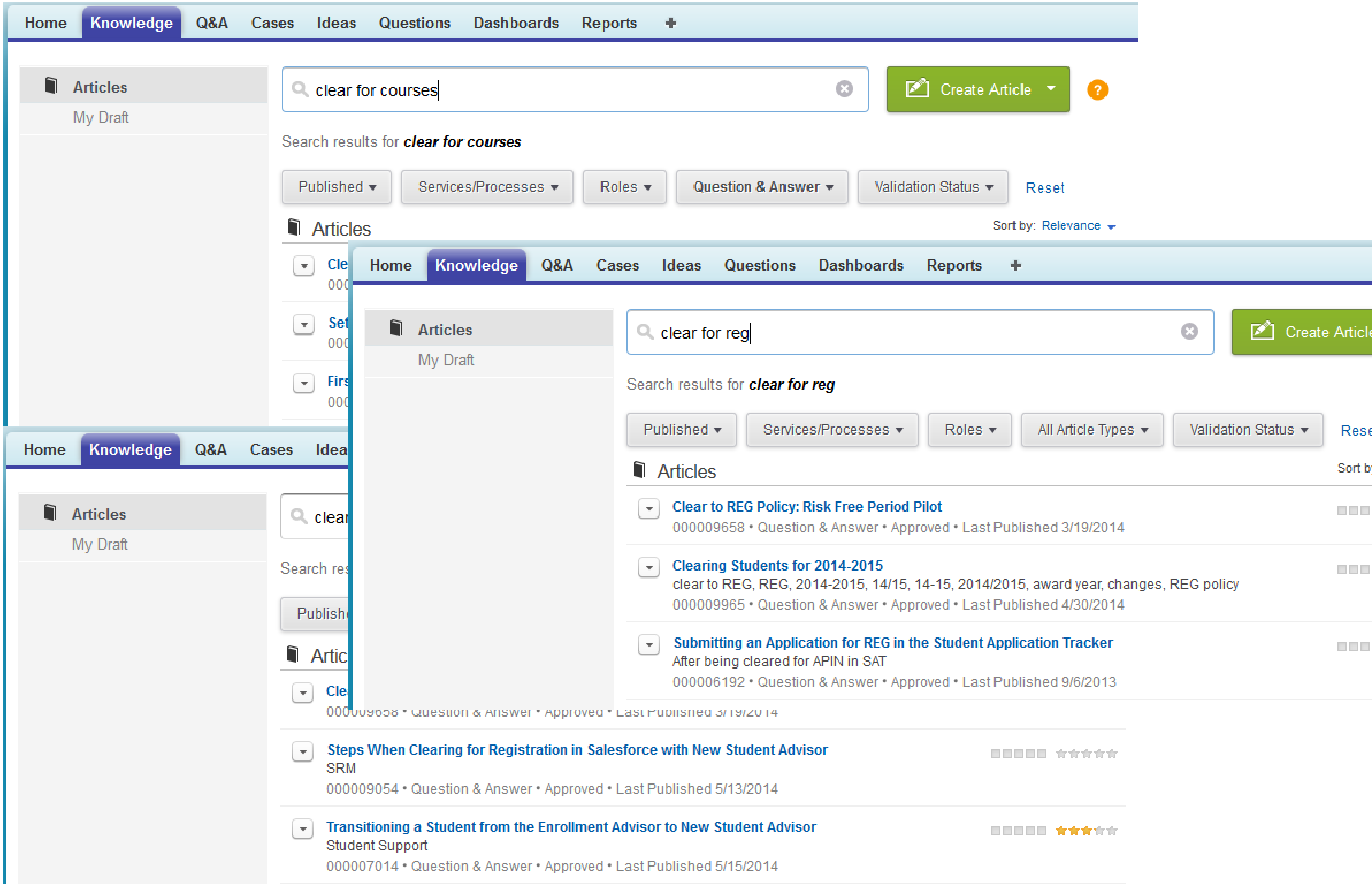
Search results will display based on various article criteria including title, data category, type, status, and rating.

Several pieces of information about each matching article is displayed.

(image 2.3.b)

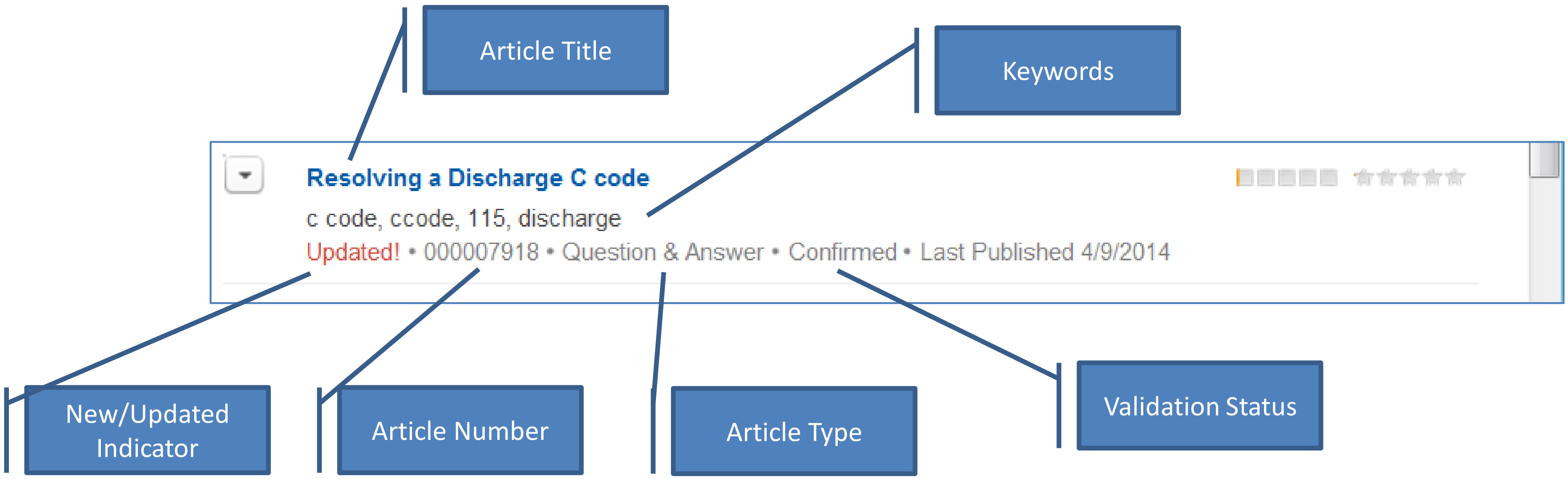
Additional Notes & Questions

Slide 2.3a



Home Knowledge Q&A Cases Ideas Questions Dashboards Reports
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
Home Knowledge Q&A Cases Ideas Questions Dashboards Reports
Articles
My Draft
clear for reg
Create Article
Search results for clear for reg
Published
Services/Processes
Roles
All Article Types
Validation Status
Articles
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
Home Knowledge Q&A Cases
Articles
My Draft
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

Slide 2.3b


Article Title
Keywords
Resolving a Discharge C code
c code, ccode, 115, discharge
Updated! • 000007918 • Question & Answer • Confirmed • Last Published 4/9/2014
New/Updated Indicator
Article Number
Article Type
Validation Status

2. Use It

- Log into Salesforce
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- 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.

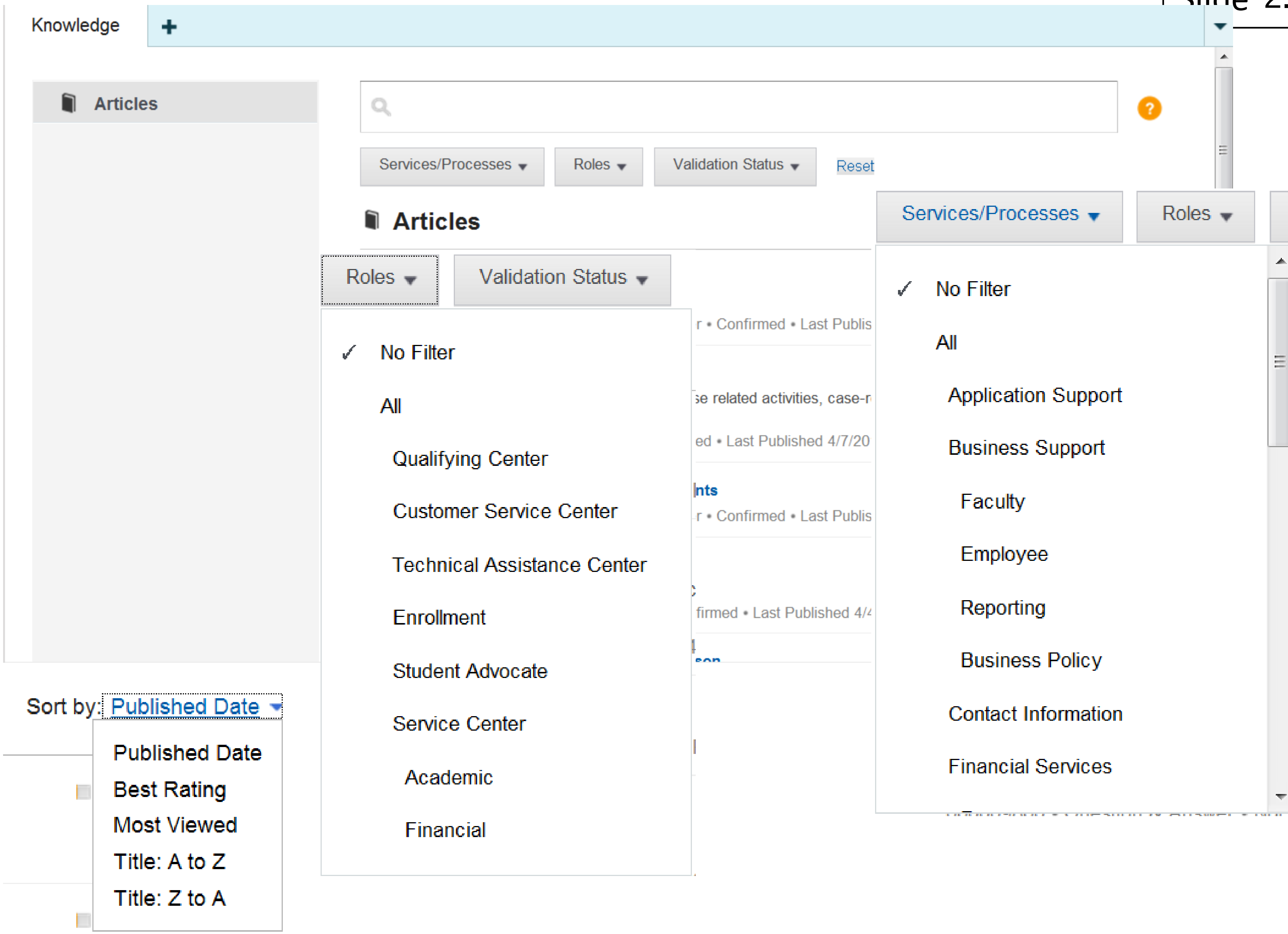
Articles can also be filtered by Services/Processes categories such as Programs & Courses to narrow search results to articles that apply to the chosen category.

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

Slide 2.4a


Knowledge
Articles
Services/Processes
Roles
Validation Status
Reset
Articles
Roles
Validation Status
No Filter
All
Qualifying Center
Customer Service Center
Technical Assistance Center
Enrollment
Student Advocate
Service Center
Academic
Financial
Services/Processes
Roles
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
- Access the knowledge base
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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

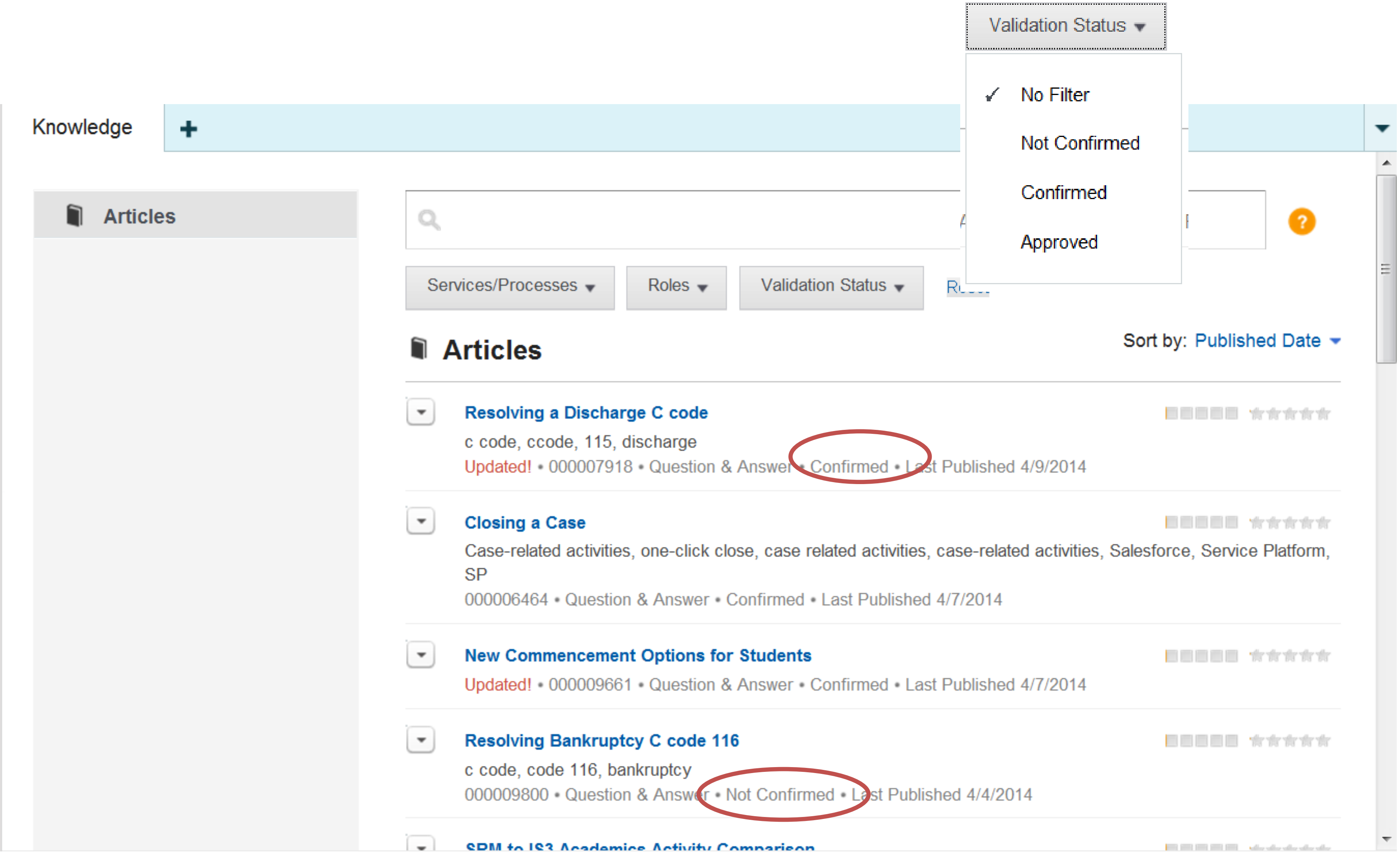
Narration:

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.

Slide 2.5a


Validation Status
No Filter
Not Confirmed
Confirmed
Approved
Knowledge
Articles
Services/Processes
Roles
Validation Status
Articles
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

2. Use It

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- 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

Slide 2.6a

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

Slide 2.6b

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

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Information | Role Centric | **Attachments**

Attachment 1 Page Detail Screenshot.pdf

Attachment 2

Attachment 3

Attachment 4

Slide 2.6c

Knowledge | Enterprise Knowle... | Person Account Pa... | +

Printable View | Help for this Page

Person Account Page Detail

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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
Roles Student Advocate, Service Center, Enrollment

Channels
Internal App

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

2. Use It

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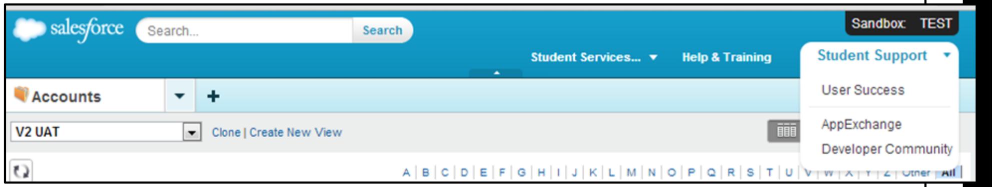
- **Search Q&A**

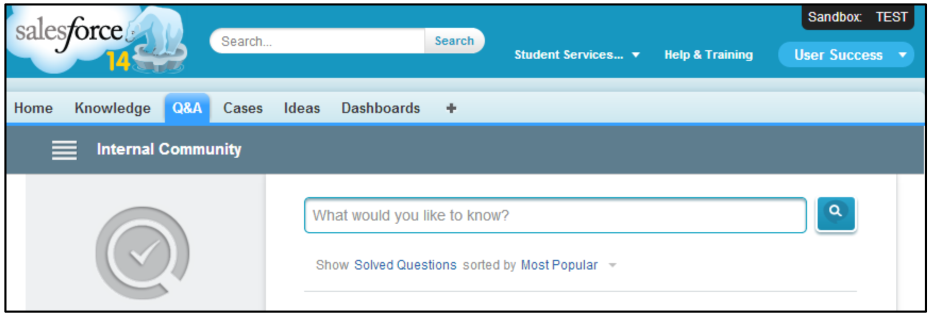
Search Q&A

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.

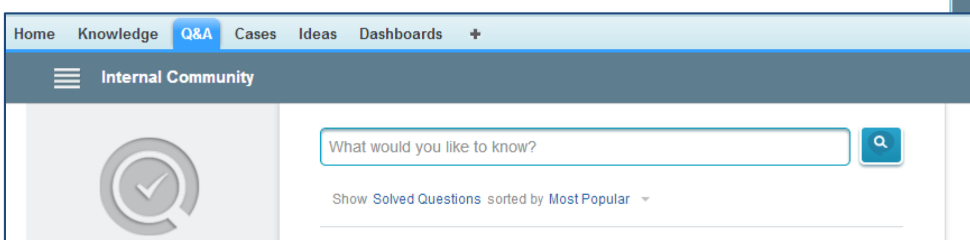


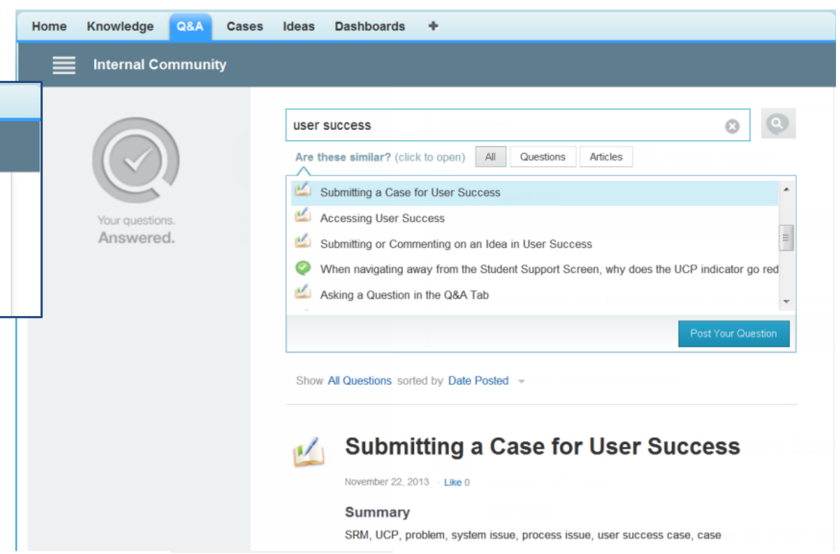
Additional Notes & Questions

Slide

Q&A Search

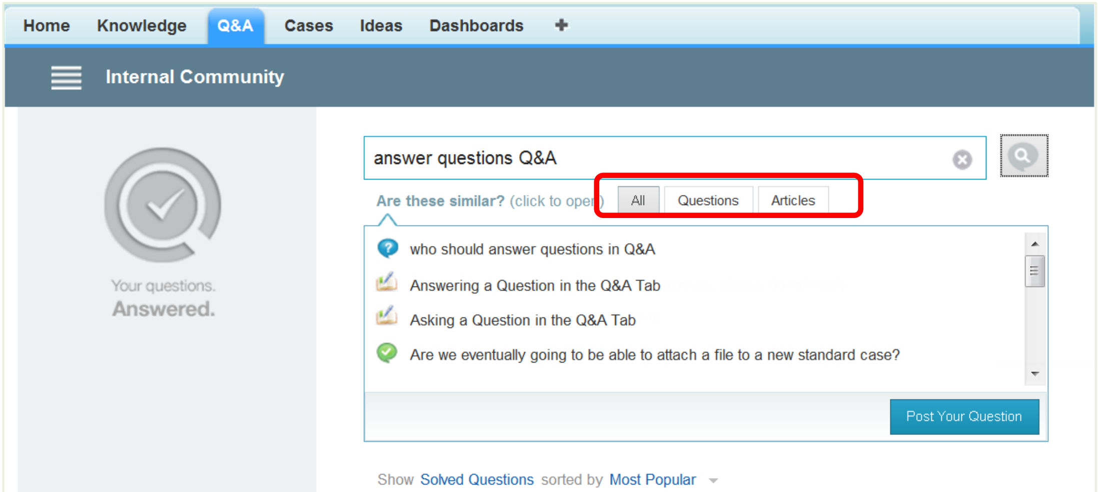
For example, let's say you wanted to review how to submit a case to the **User Success** app.
From the **Q&A** tab, type "user success" in the **What would you like to know?** search field. Click on the **magnifying glass** or press the **Enter** key to search.
Results will appear and additional similar 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.





Slide

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.

Slide

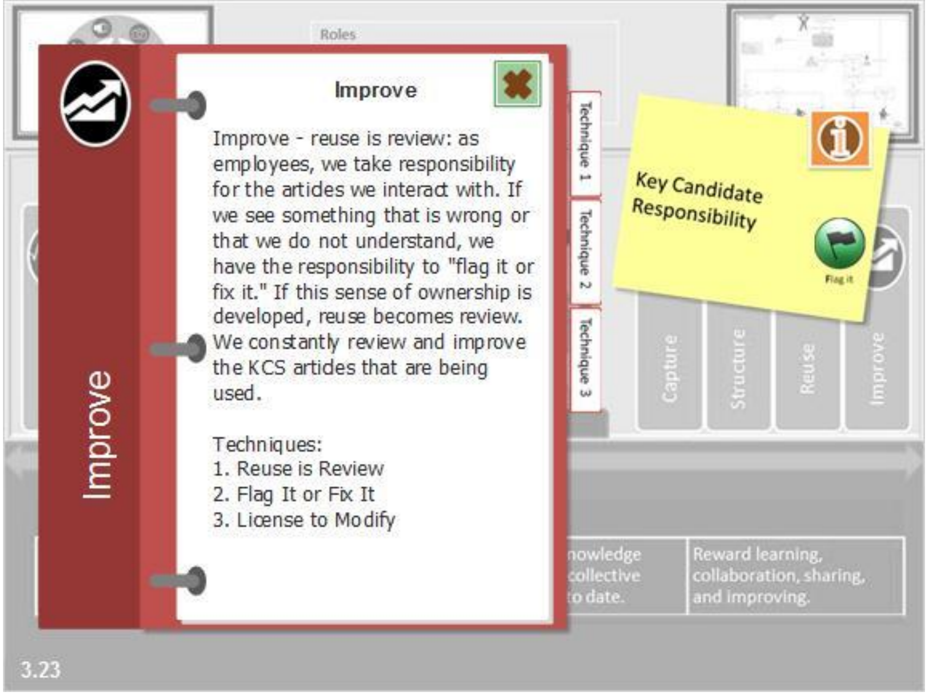
Searching Options

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
• Search knowledge articles only • Filtering • Chatter feed • #Feedback • Follow • Rating • Properties • Versions	• Search knowledge articles and Question/Answer • Like

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



Additional Notes & Questions

Start Learning Button

Slide 3.2

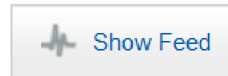
3. Flag It

- Provide feedback on a knowledge article

Types of changes
- Inaccurate content
- Incorrect spelling and grammar
- Keywords
- Duplicate removal request

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

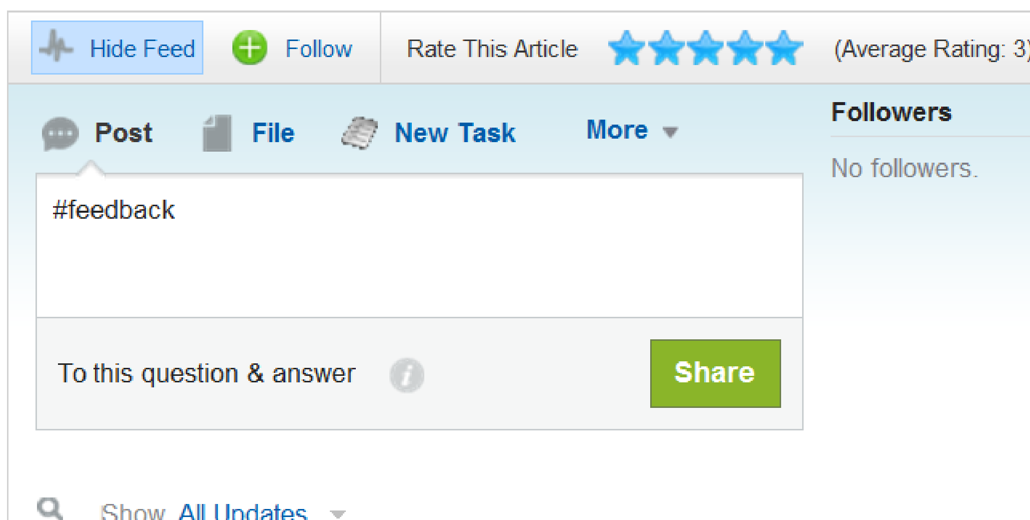
To provide specific suggestions for the article, click the **Show Feed** link.



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**.

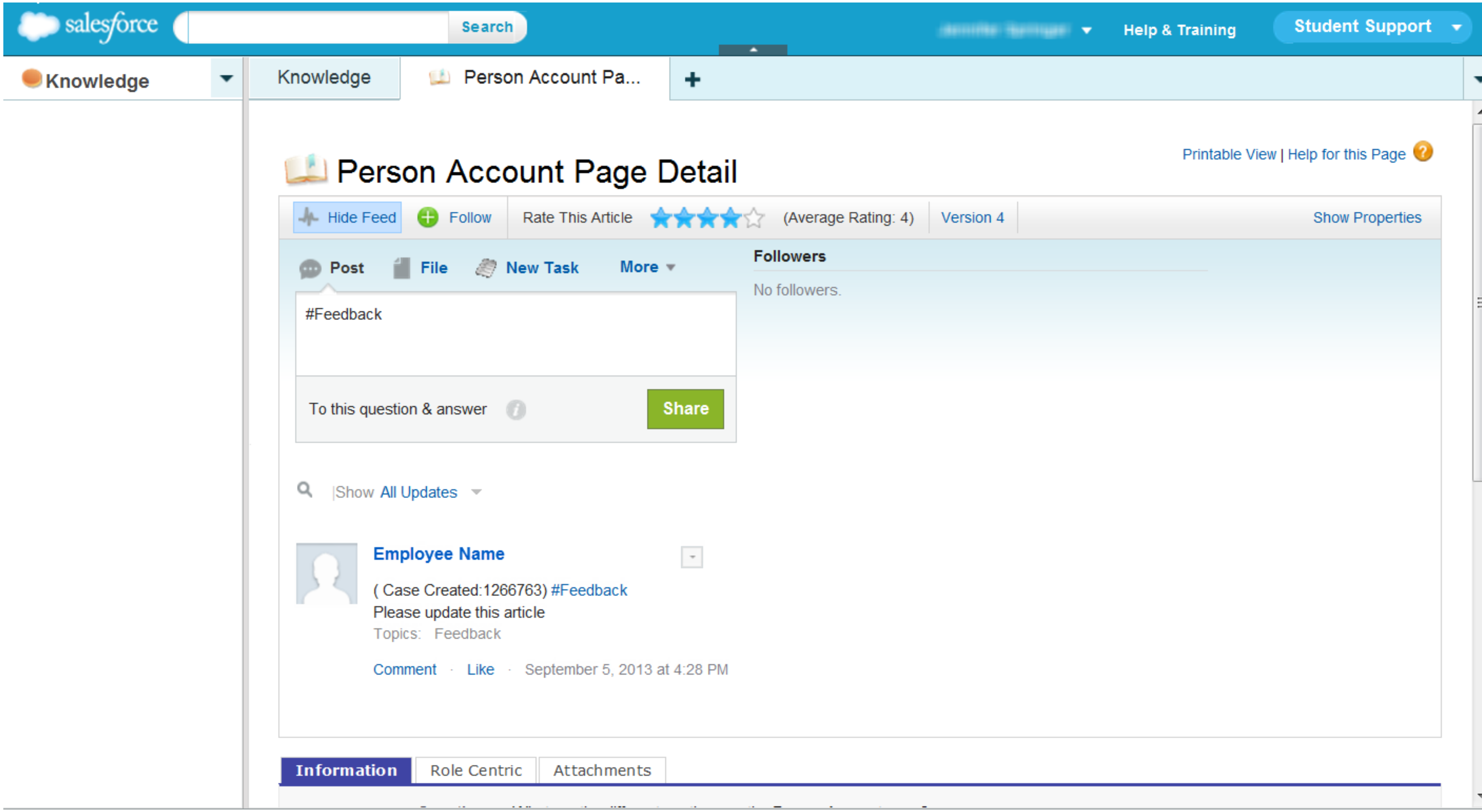
Once the feedback is posted, note that there is a case number assigned that you can search through the global search, or from your personal feed, to track the status of the case.



Additional Notes & Questions

Emphasize #feedback

Slide 3.2a


salesforce
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
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.

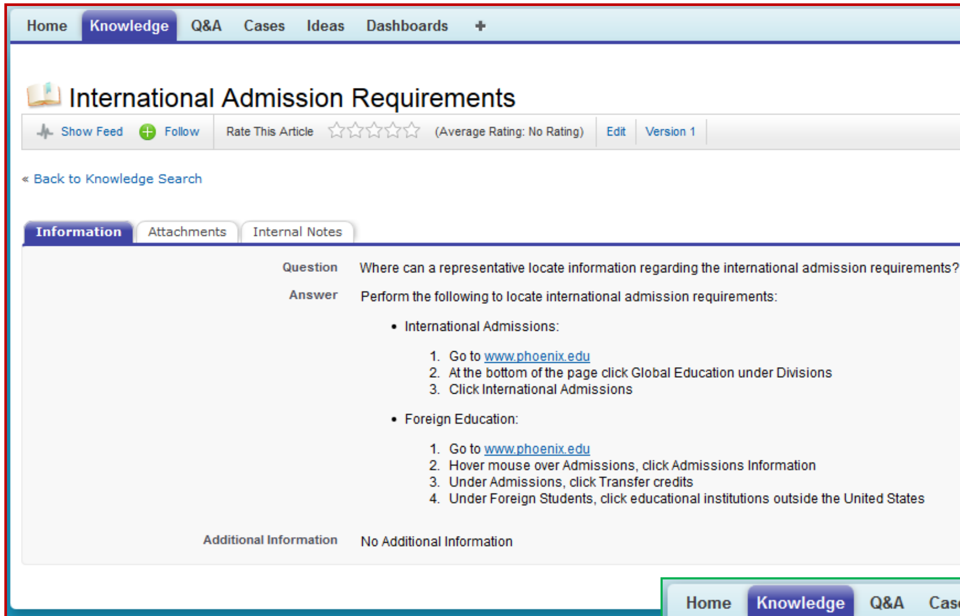
(eDev: Following four slides with different problem areas. Before and after screen shots on each slide. Inaccurate article is bordered in red and the accurate one is bordered in green.)

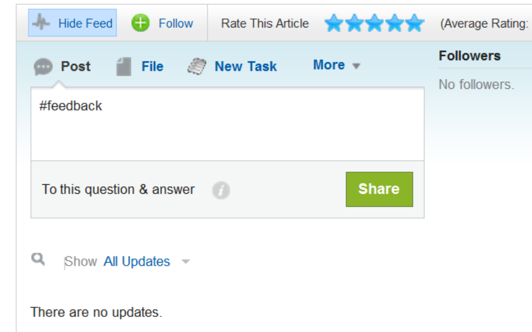
Additional Notes & Questions

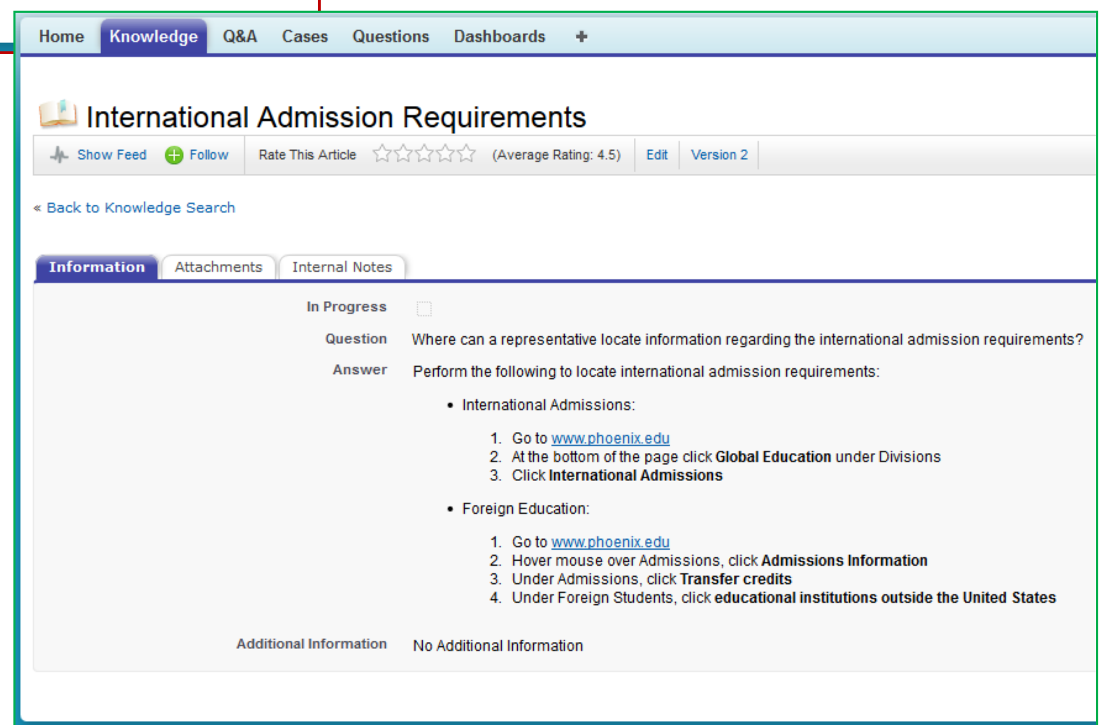
Emphasize #feedback

Article 1. Bolding

Slide 3.2a

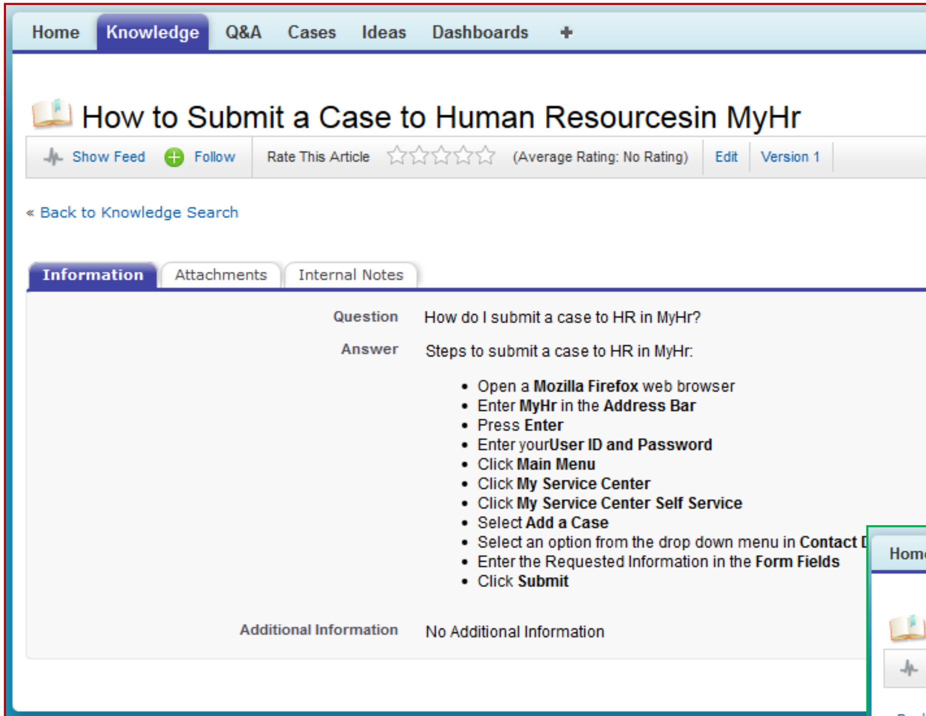


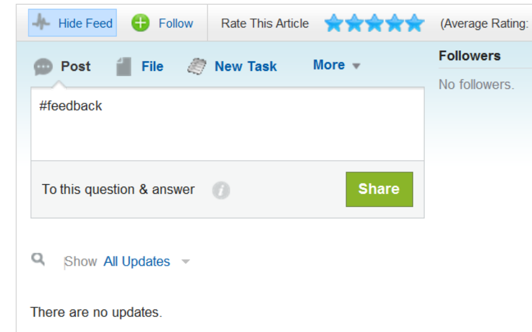


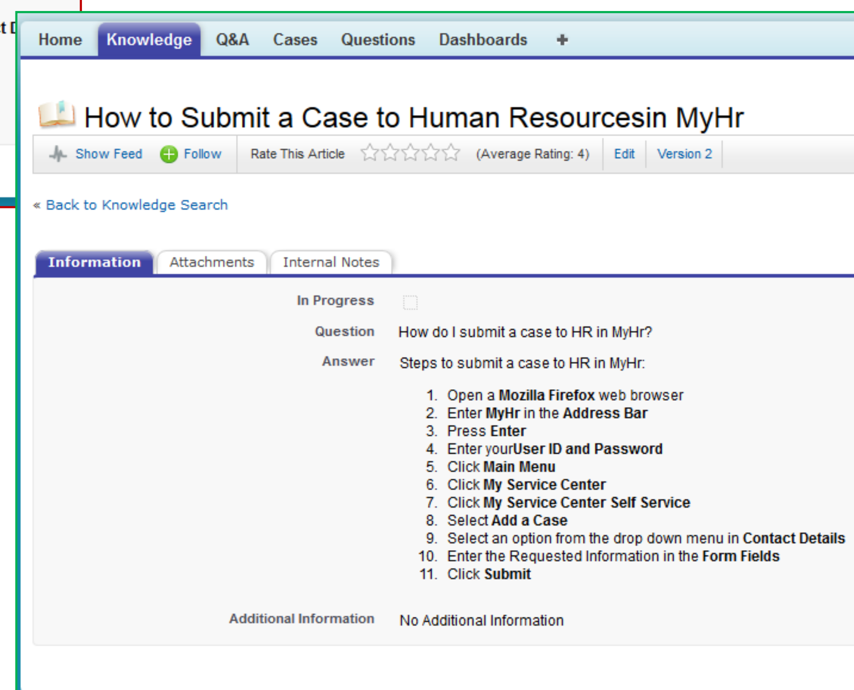


Article 2. Lists

Slide 3.2b

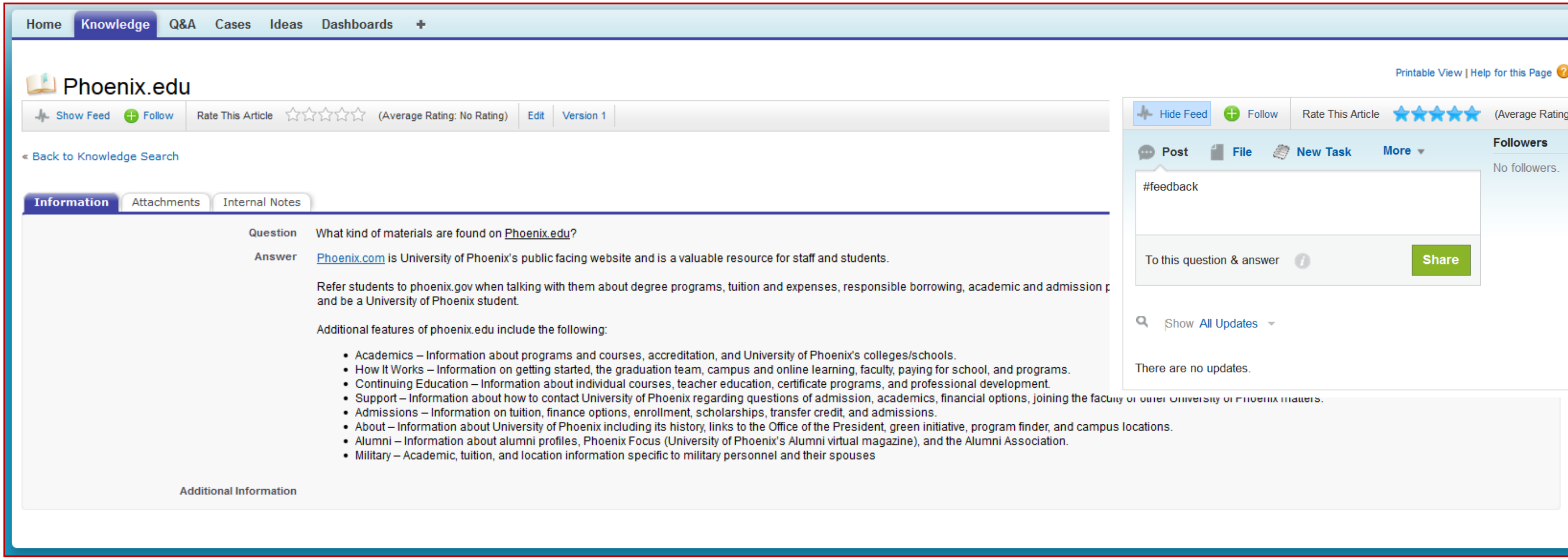


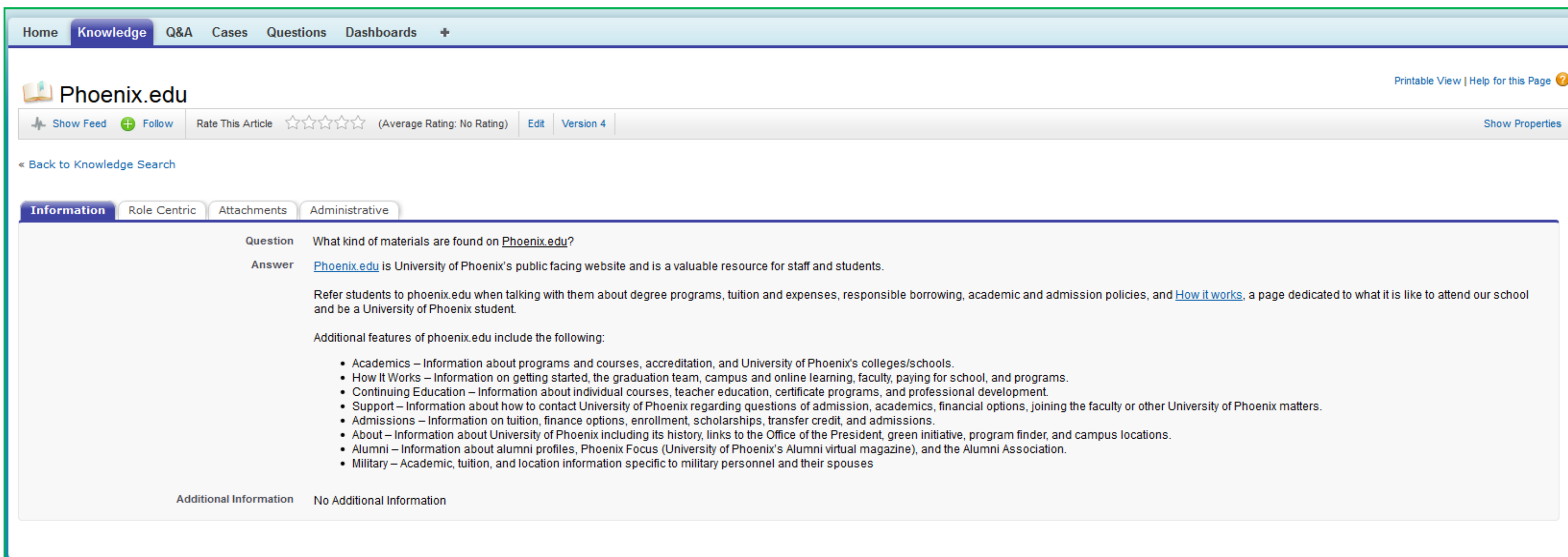




Article 3. Incorrect web address

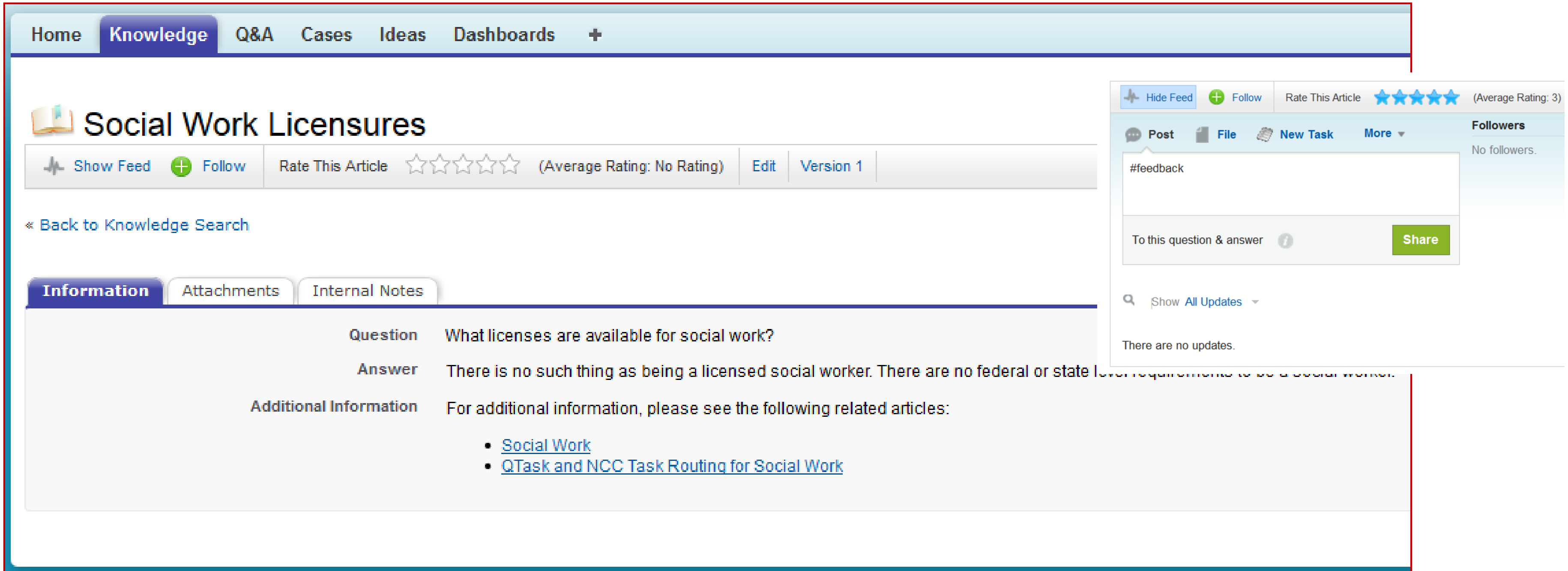
Slide 3.2c

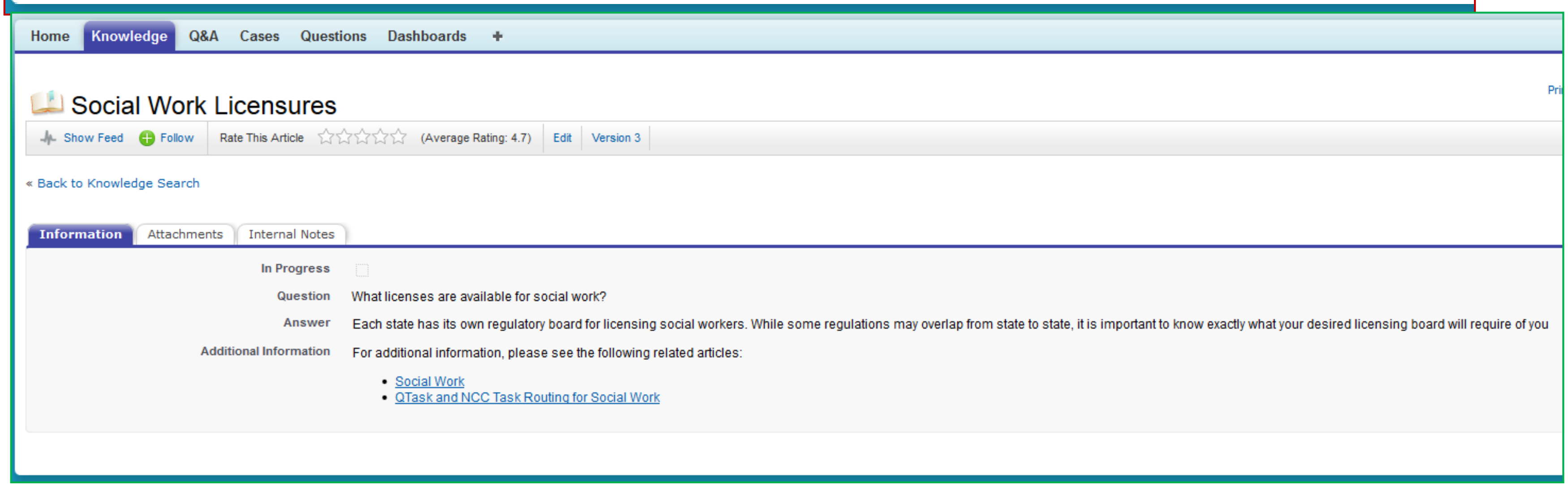




Slide 3.2d

Article 4. Incorrect Content





4. Fix It

Additional Notes & Questions

Start Learning Button

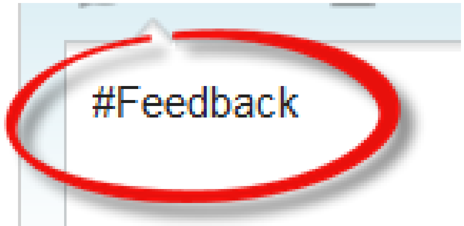
Slide 4.1

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.

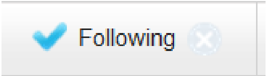


Note: **#feedback** is not case sensitive and can be placed anywhere in the text.

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)

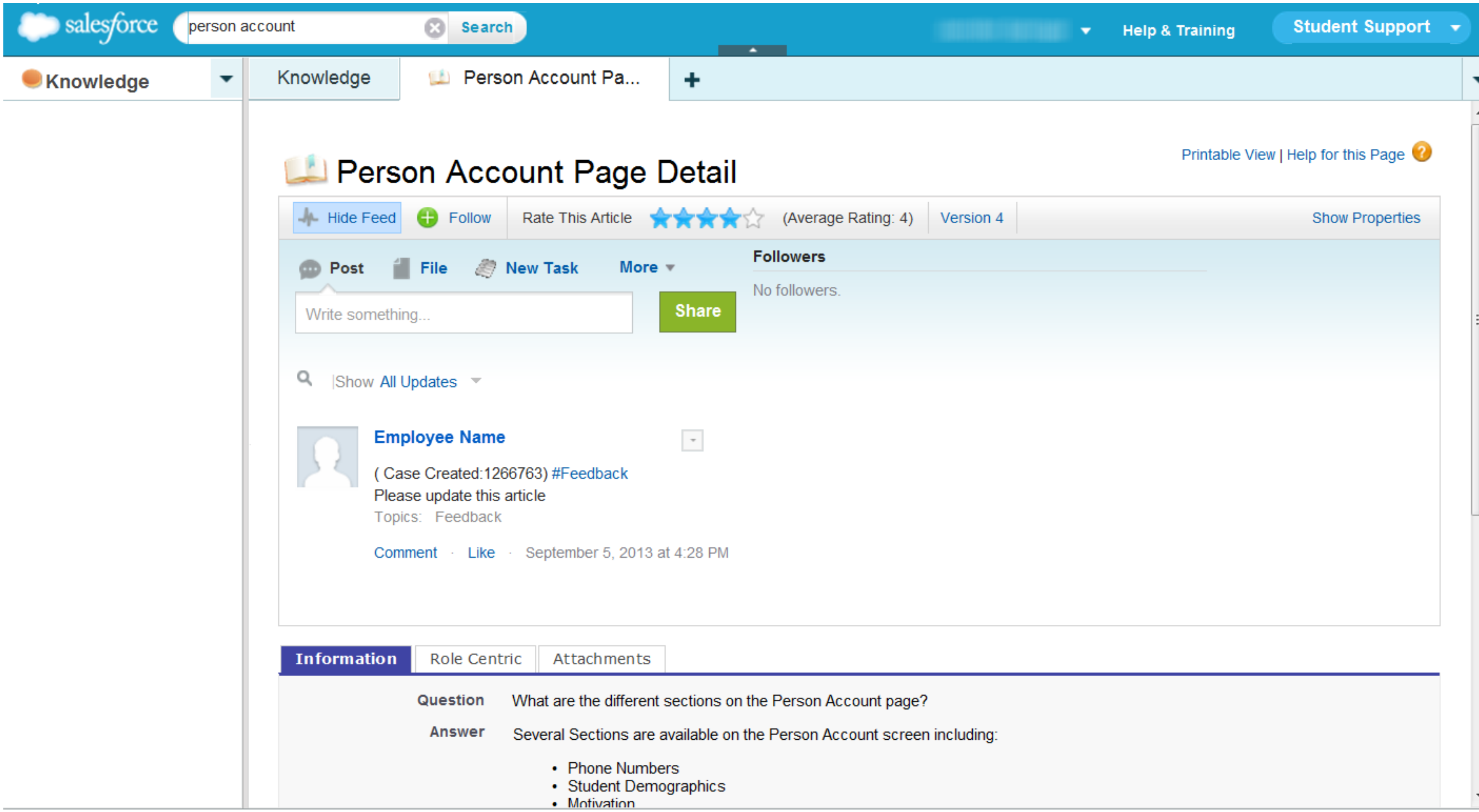
You can also click the **Follow** link to receive notifications when the article is updated.



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.

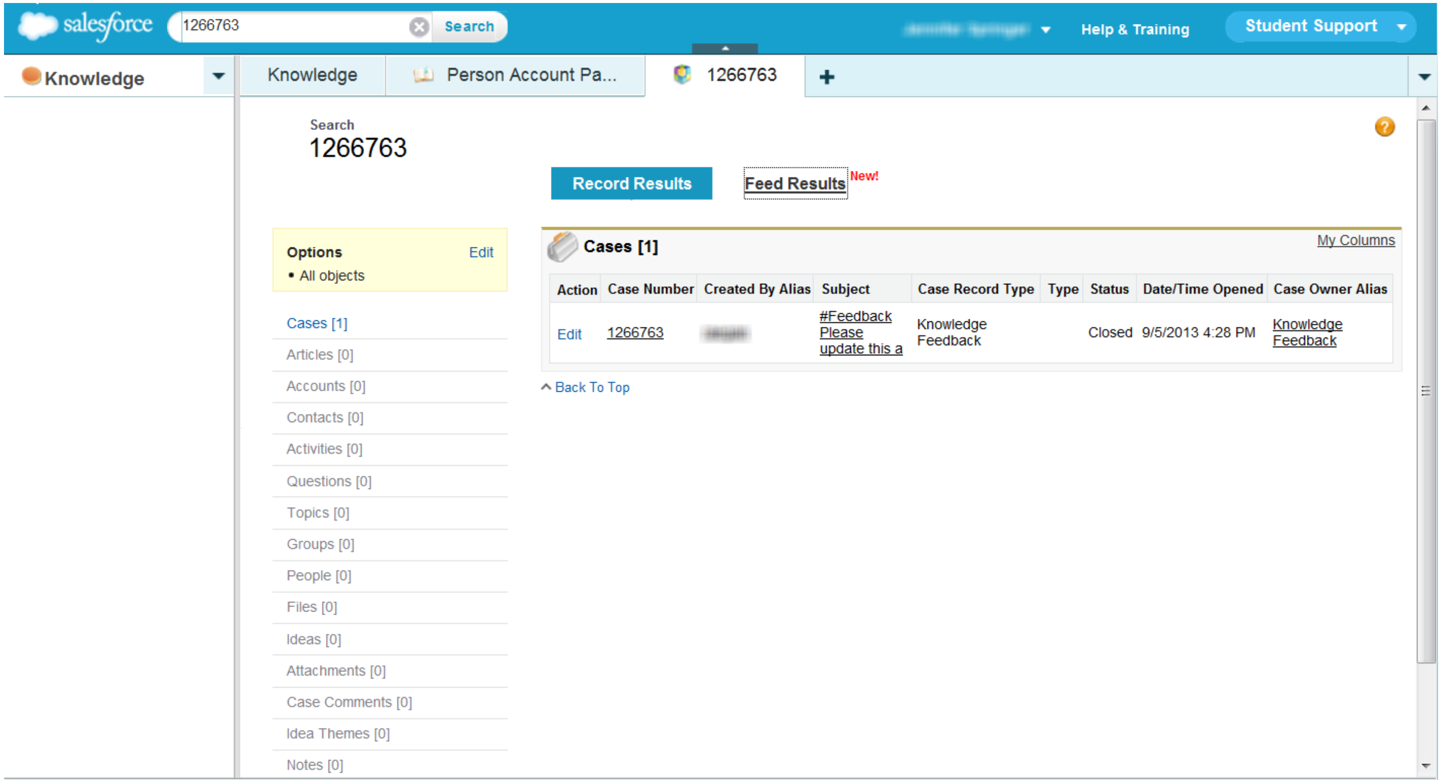
Additional Notes & Questions

Slide 4.1a



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
Write something...
Share
Followers
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

Slide 4.1b


salesforce
1266763
Search
Help & Training
Student Support
Knowledge
Knowledge
Person Account Pa...
1266763
Search
1266763
Record Results
Feed Results
New!
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
Edit | 1266763 | | #Feedback Please update this a | Knowledge Feedback | | Closed | 9/5/2013 4:28 PM | Knowledge Feedback
Back To Top

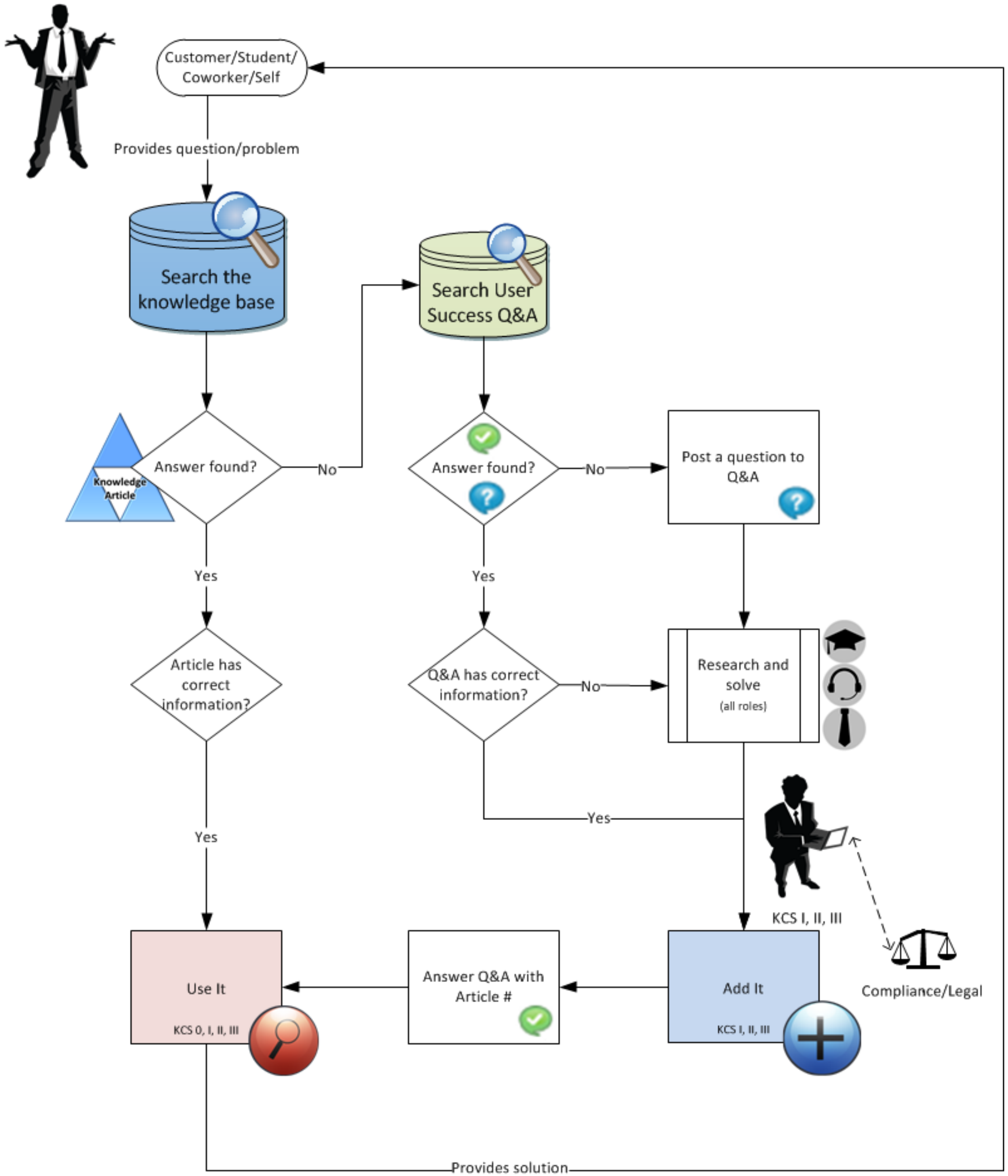

Sort By Most Recent Activity
1377732 — Ryan Egan created a case.
1377732
Subject: #feedback fix this article.
Priority: Low
Status: Open
Case Number: 1377732
Comment · Like · Today at 10:26 AM
Spring 14 release — Ryan Egan to Apollo Group Only
(Case Created:1377732) #feedback fix this article.

5. Add It

Additional Notes & Questions

Start Learning Button

Slide 5.1



[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.

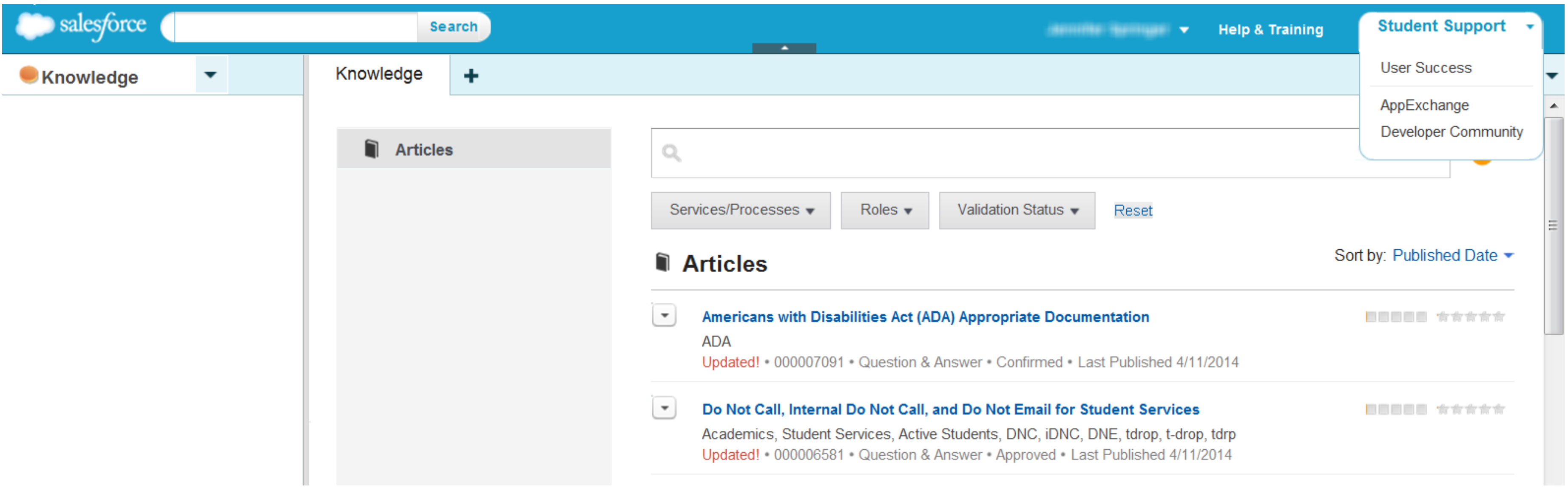
(image 5.1a)

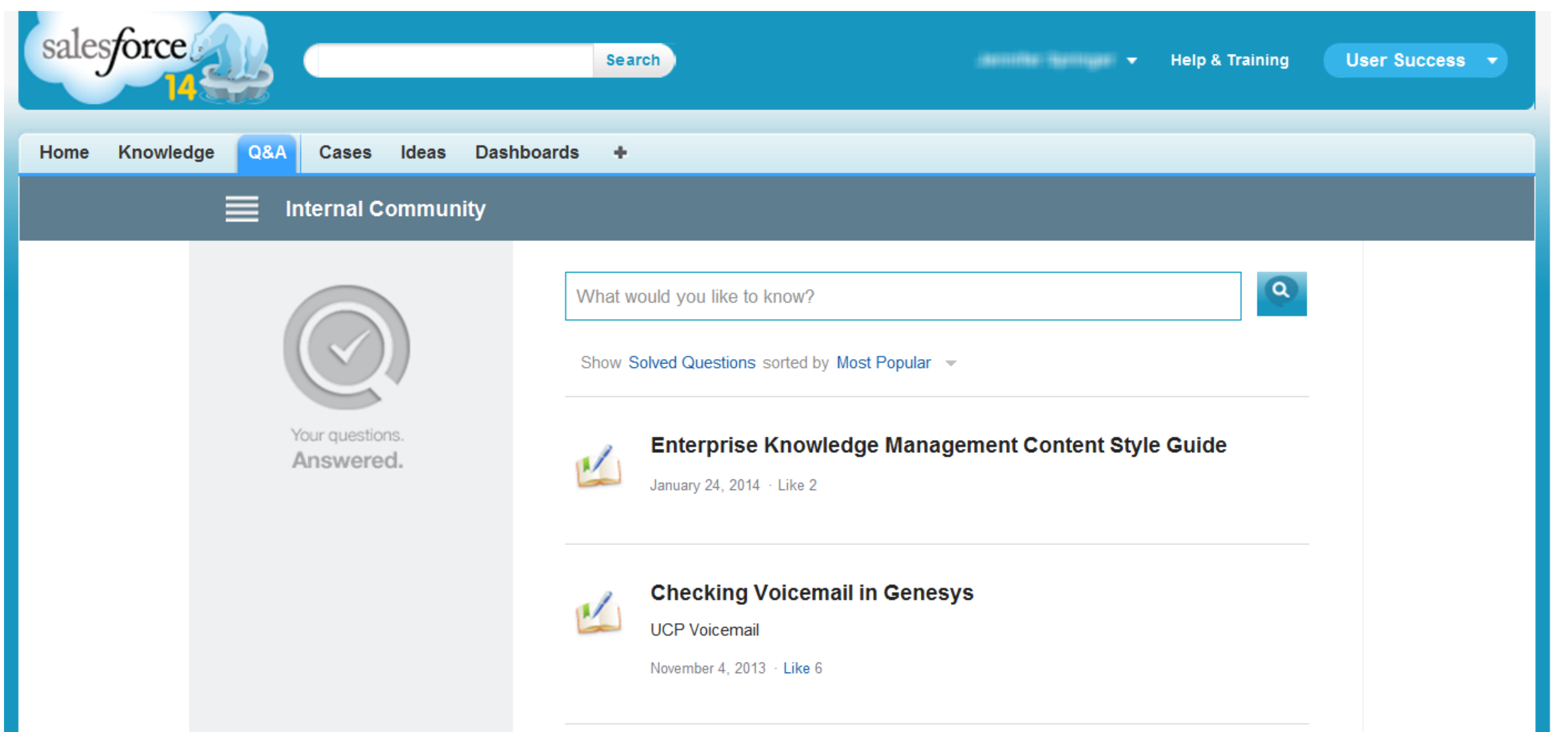
The **Q&A** tab allows you to search for questions, FAQs, or knowledge articles that may answer your question. Post a question for others to answer, and answer a question asked by another user.

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

Slide 5.1a


salesforce
Search
Help & Training
Student Support
User Success
AppExchange
Developer Community
Knowledge
Knowledge
Articles
Services/Processes
Roles
Validation Status
Reset
Articles
Sort by: Published Date
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


salesforce 14
Search
Help & Training
User Success
Home
Knowledge
Q&A
Cases
Ideas
Dashboards
Internal Community
Your questions.
Answered.
What would you like to know?
Show Solved Questions sorted by Most Popular
Enterprise Knowledge Management Content Style Guide
January 24, 2014 · Like 2
Checking Voicemail in Genesys
UCP Voicemail
November 4, 2013 · Like 6

Slide

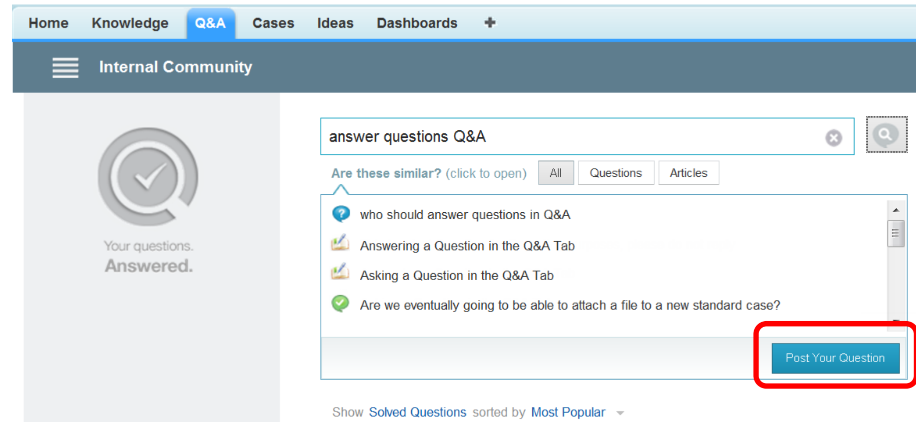
Posting a Question

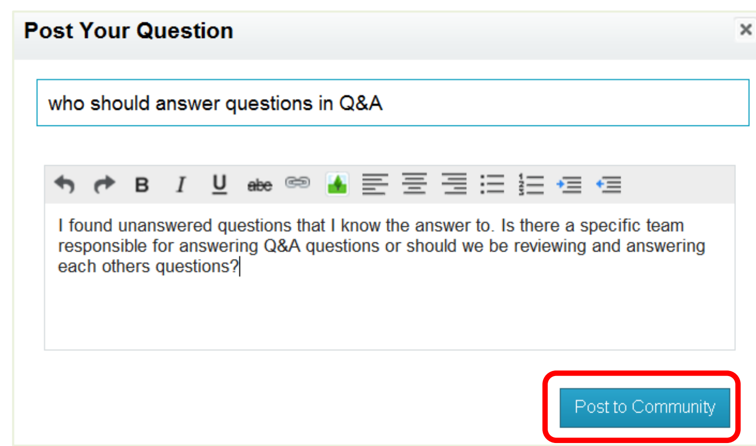
Posting a Question
When a search returns no answers or knowledge articles that resolve your question, post the question for the community to review and answer. To post a new question, click the **Post Your Question** button.

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.

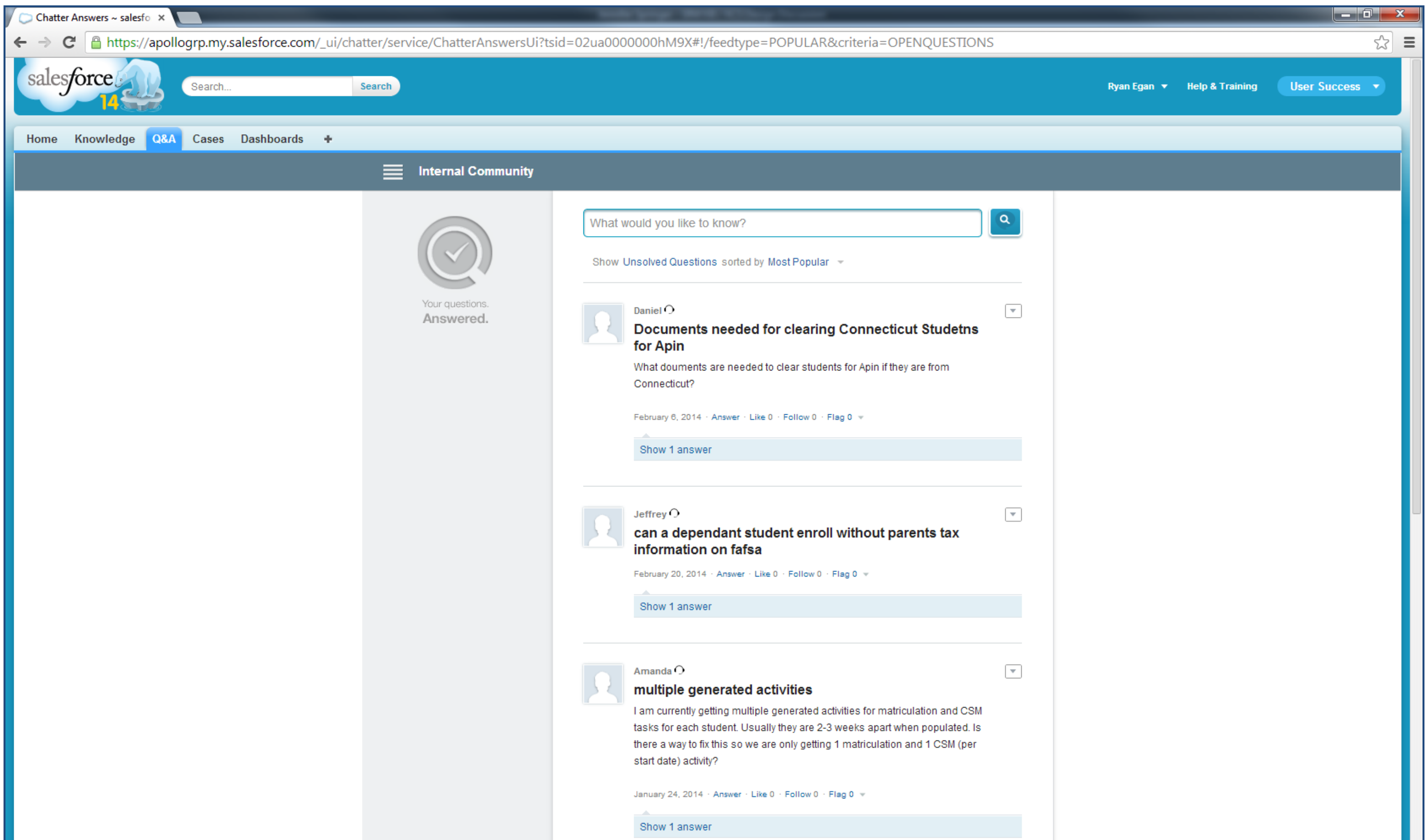




Slide

Follow a Question

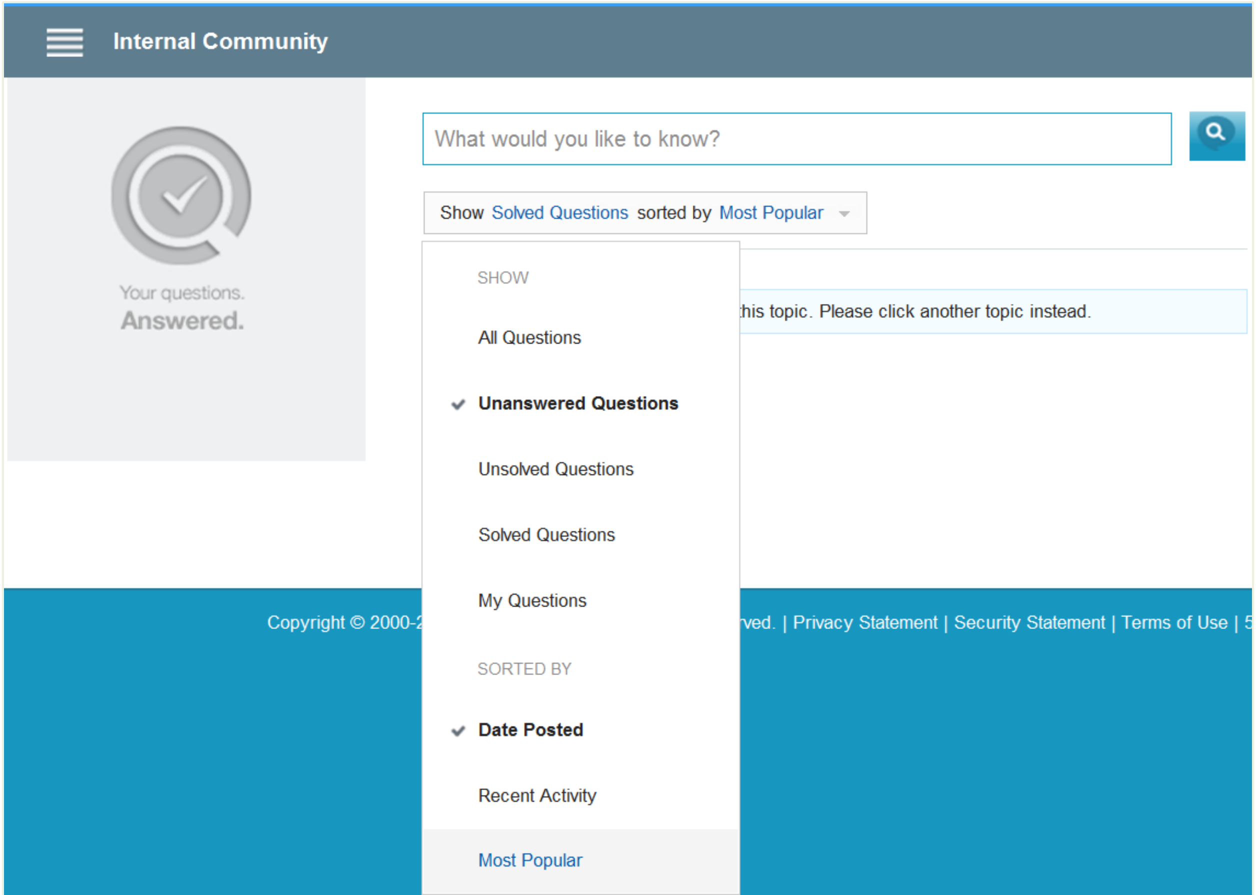
Click the **Follow** link on a question to be notified in your chatter feed when the question is answered.



Slide

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**.



Slide

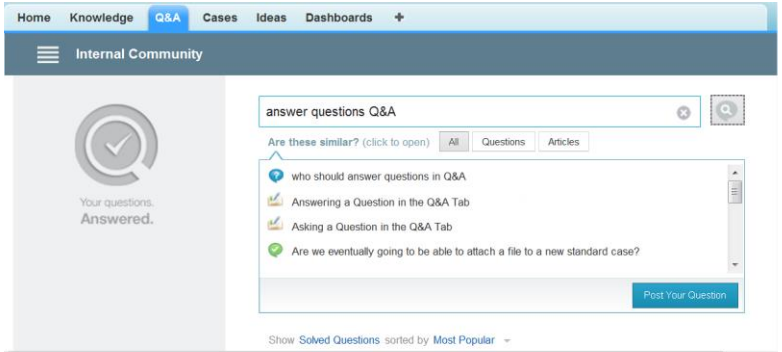
Answering a Question

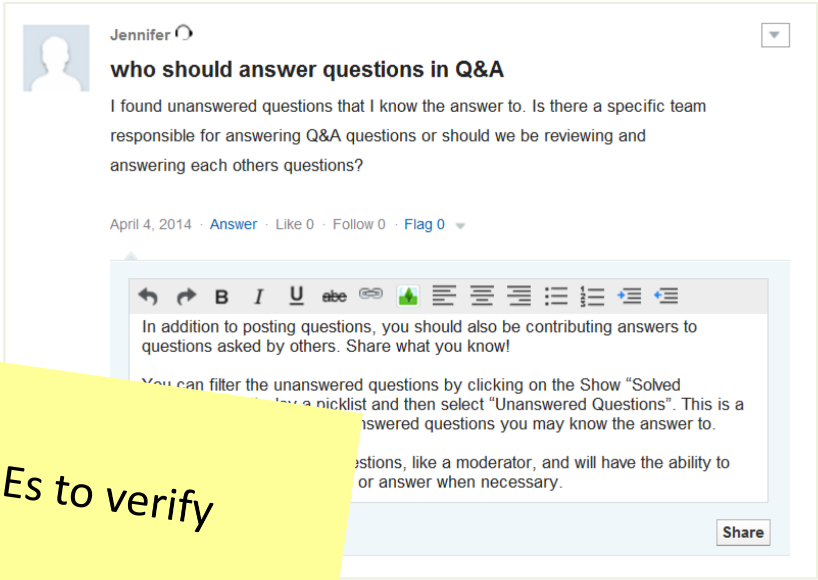
Answering a Question

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.

Slide

Additional Notes & Questions

5. Add It

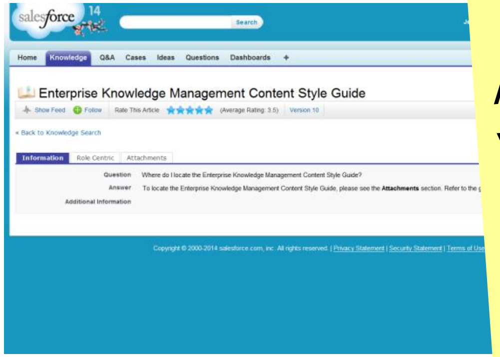
Expectations as a KCS I Candidate:

- 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.

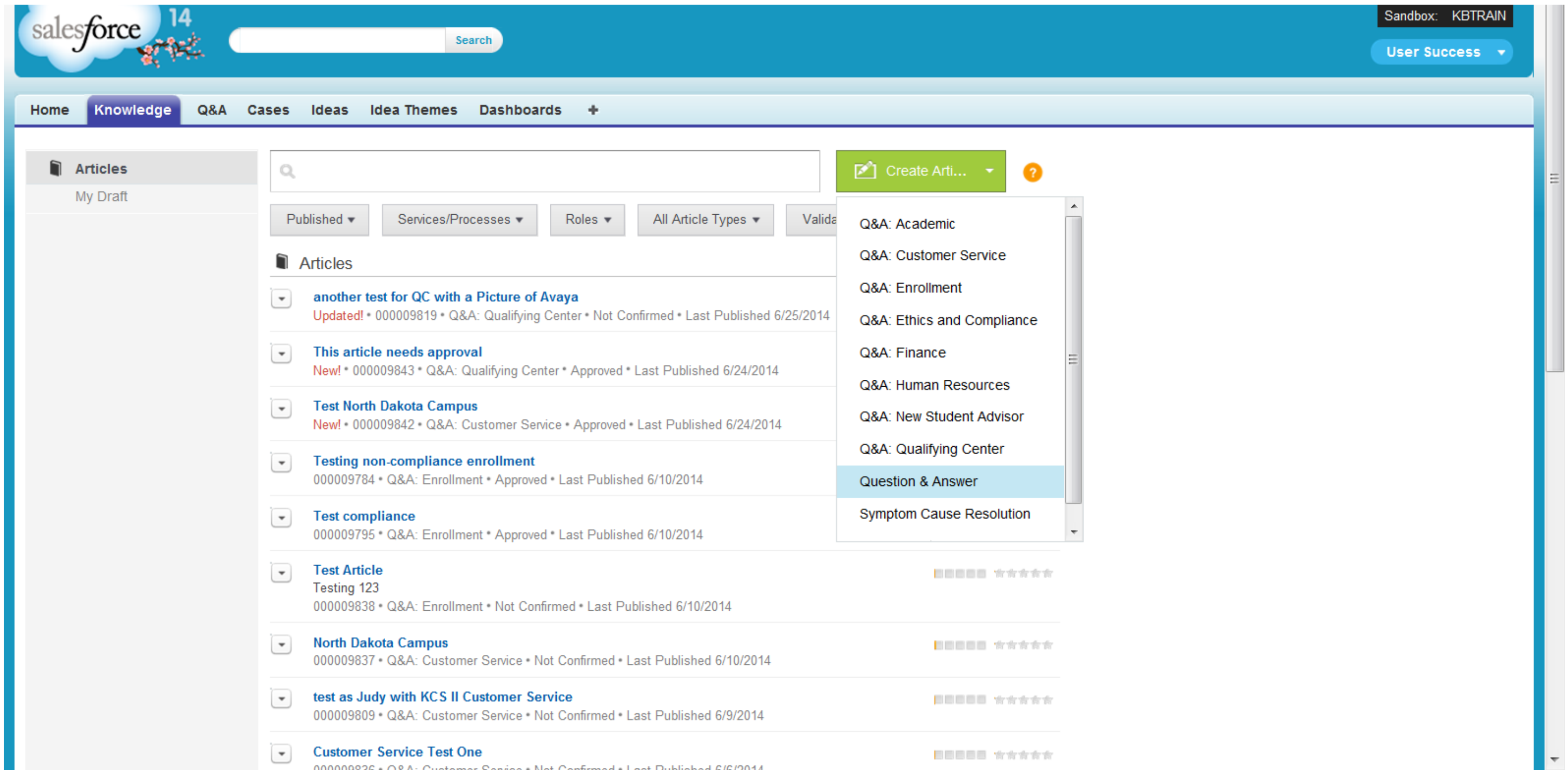
Slide

Additional Notes & Questions

Slide

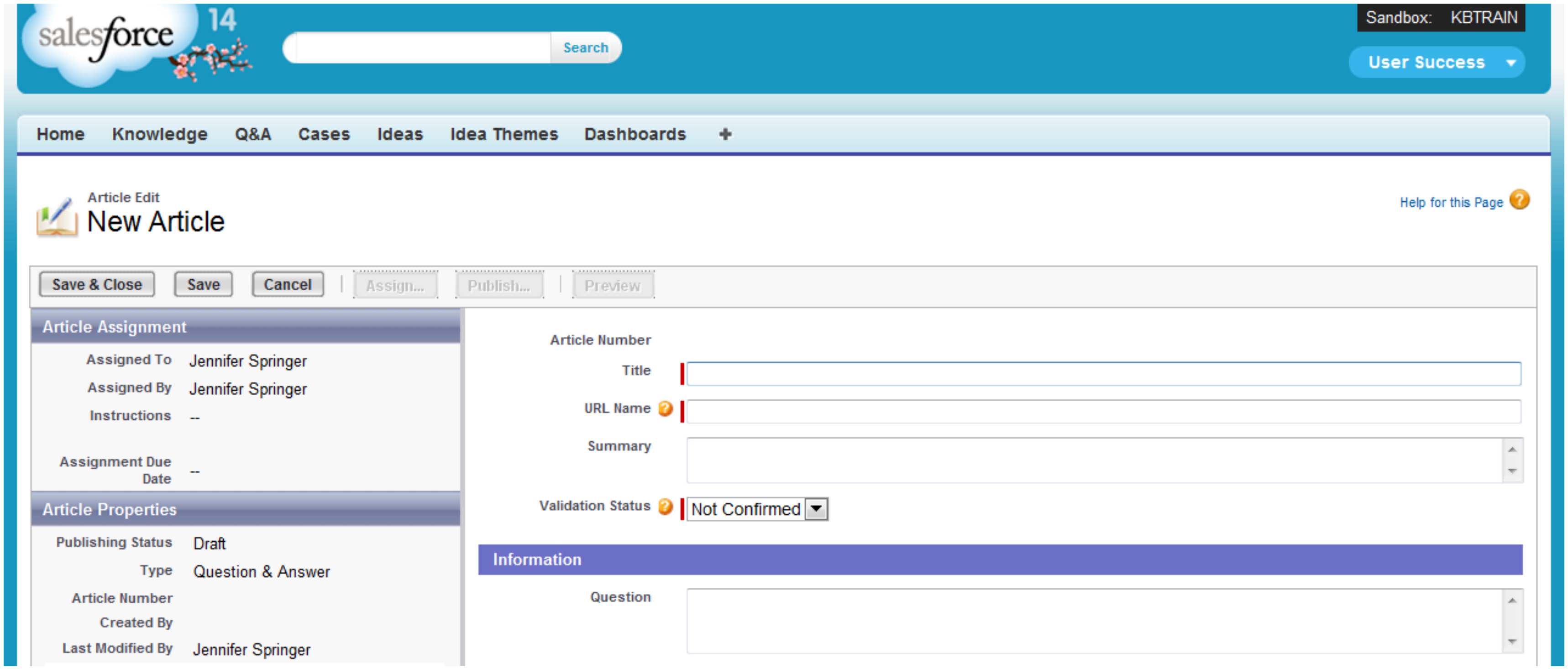
Create Article

Click the **Create Article** button.
Select the appropriate template from the drop-down menu. You will see different options based on your role.



Slide

Title/URL Name/Summary



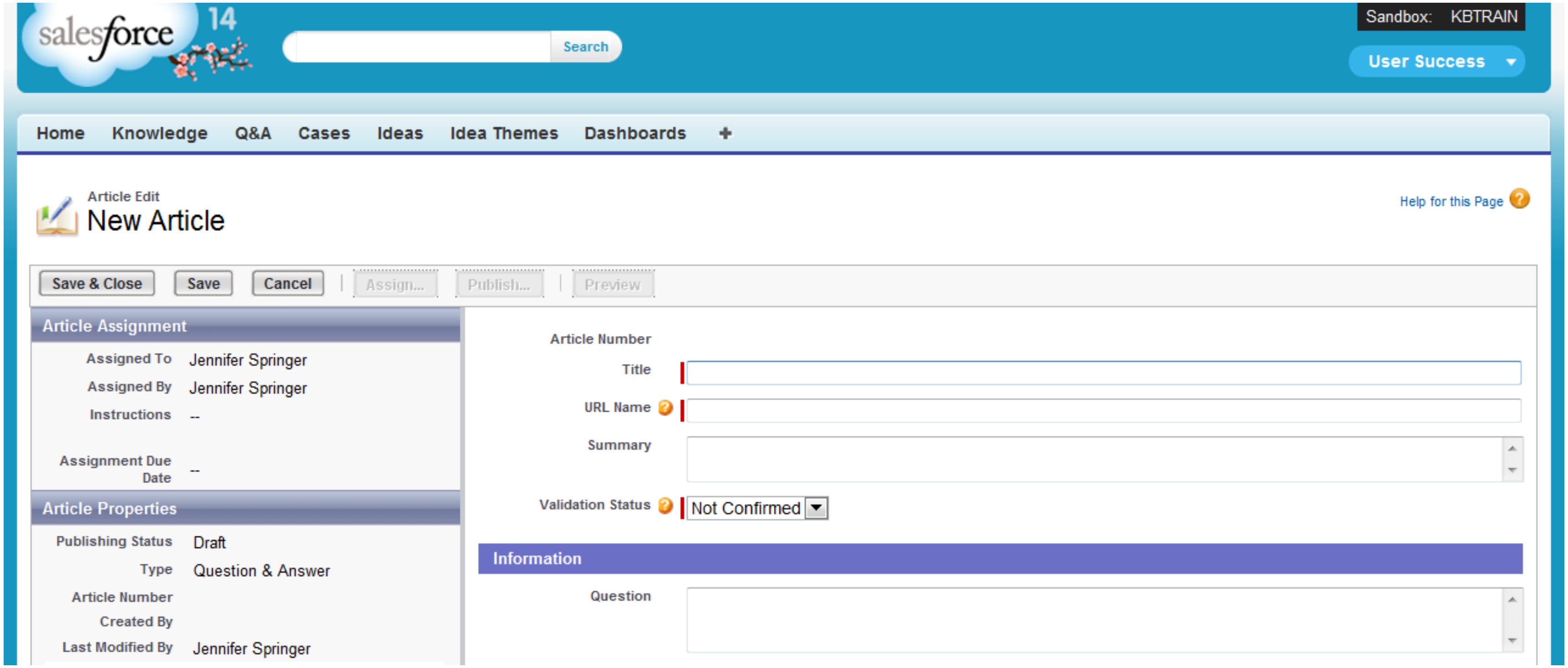
Enter a **Title –** Keep it brief with no special characters (Example: - & _ ( ) # @). It is important to only use alphanumeric characters because a unique URL will be created from the title.

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).

Slide

Validation Status/Question

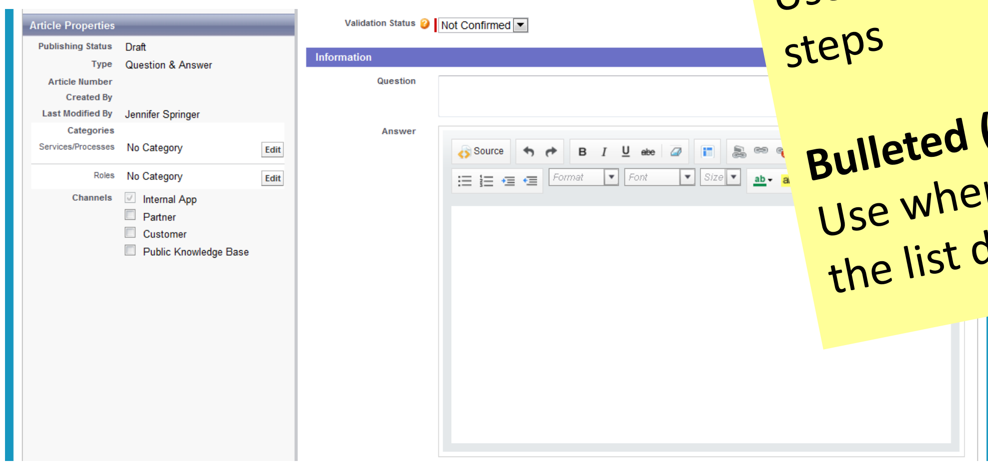


Leave the **Validation Status** as **Not Confirmed** - The validation status will always be **Not Confirmed** for articles created by a KCS I Candidate until it is reviewed, validated, and styled by a KCS II Contributor.

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.**



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 a

Good example: Click Tax Forms/1098T

Bad example: Have the student click Tax Fo

Style Guide Example

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

LISTS

Lists do not have periods in the entry item unless there

Style Guide Example

NUMBERED (ORDERED)

Use numbered lists when listing multiple items
This is also referred to as an ordered list. Steps
verb. When providing steps, preface with 'perfo

Example: To locate the student, perform

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

BULLETED (UNORDERED)

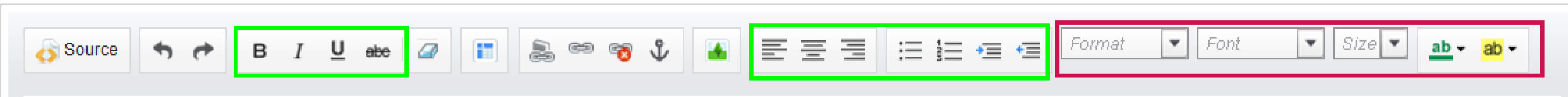
Use bulleted lists when listing multiple items, or when the order of the list is irrelevant, such as a list of needed items.

Example: Submit the following items:

- FAFSA
- Admissions Application
- Transcripts

Slide

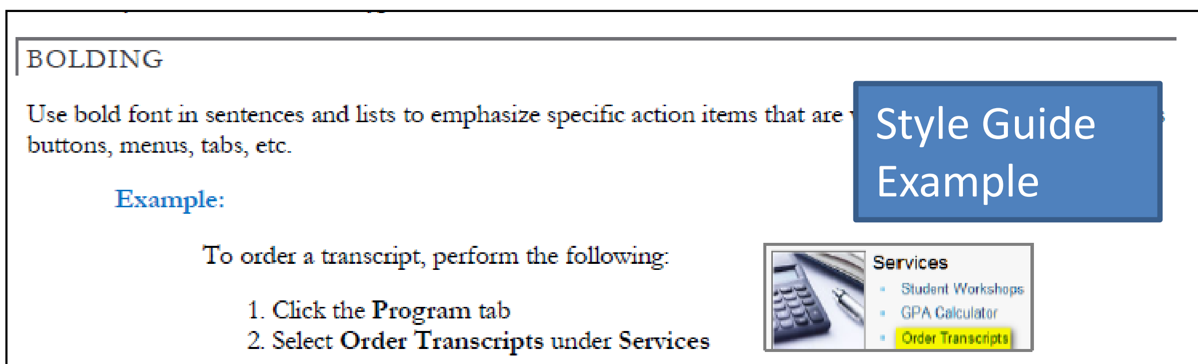
Toolbar- Rich Text Toolbar



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.

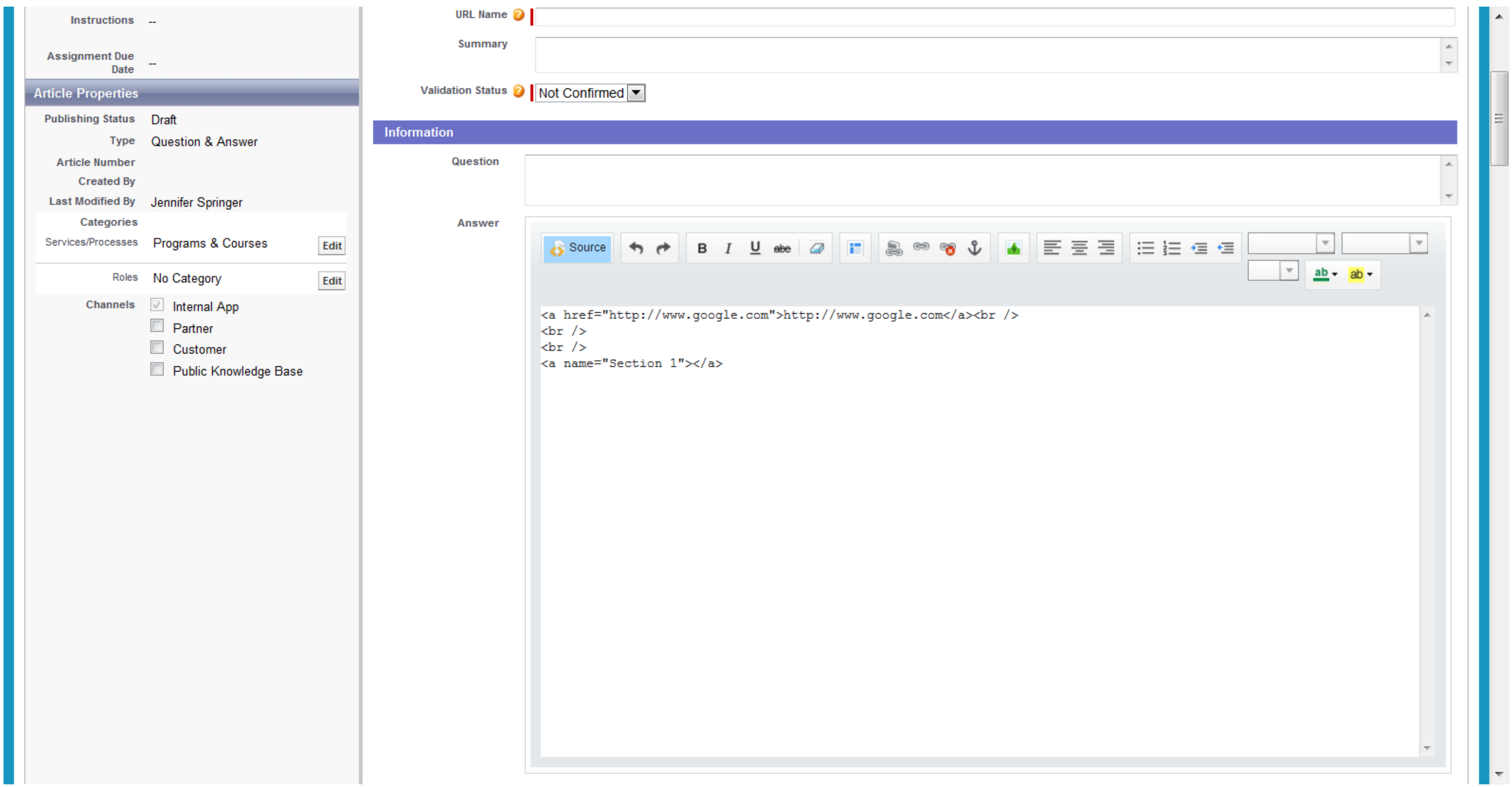
Tip: Pressing the **Tab** key will move you to the next data entry field. To indent text or create a sub-bullet, click the **Indent** button.



Slide

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.

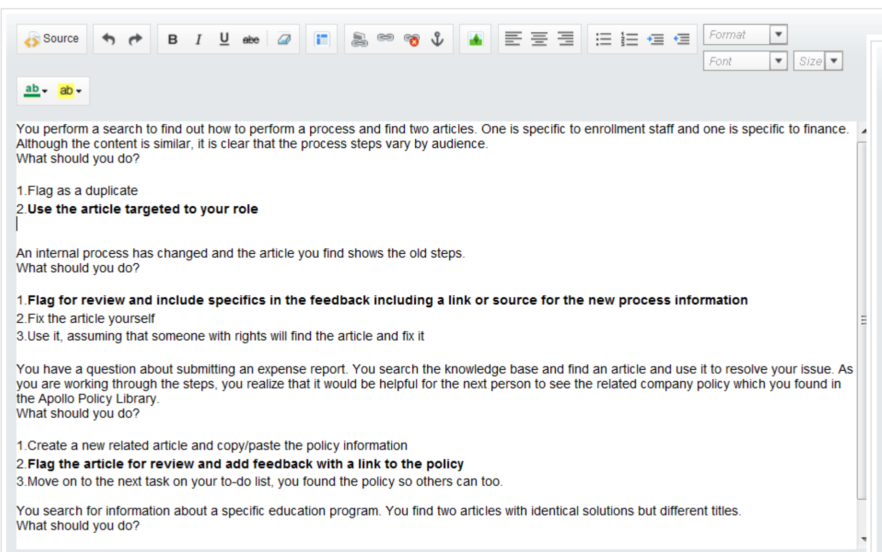


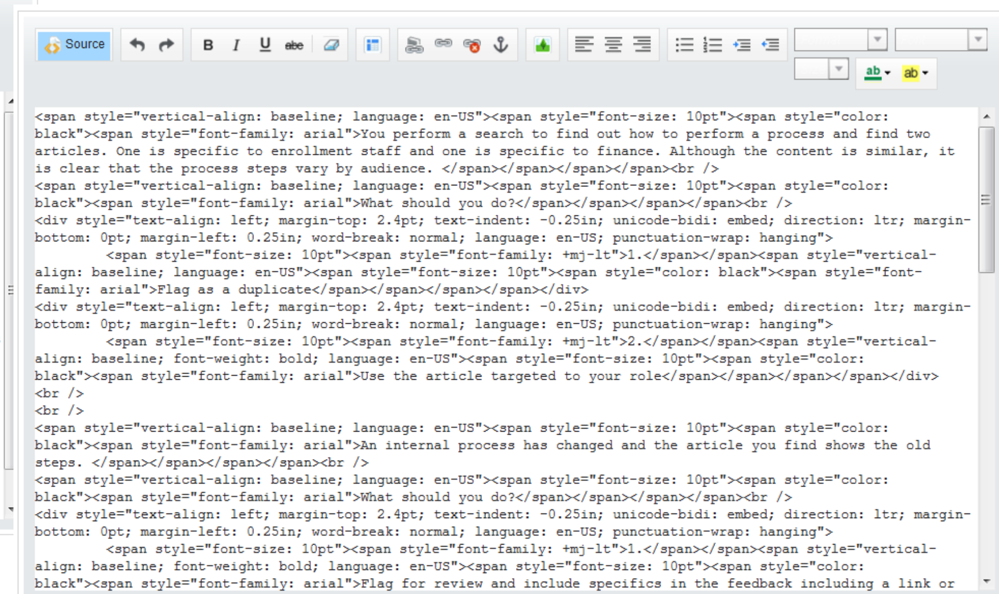
Slide

Toolbar- Eraser

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

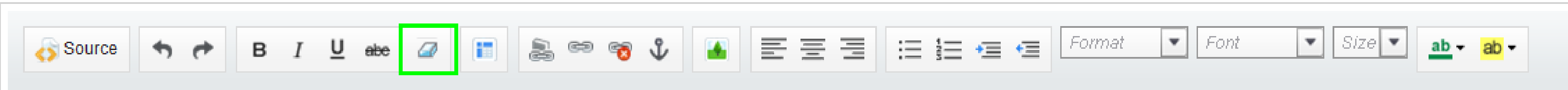
Here is an example of text pasted from a Microsoft Word document. It looks alright, but if you click the **Source** button, then you will see a lot of extra formatting that can cause problems and inconsistencies in styling.



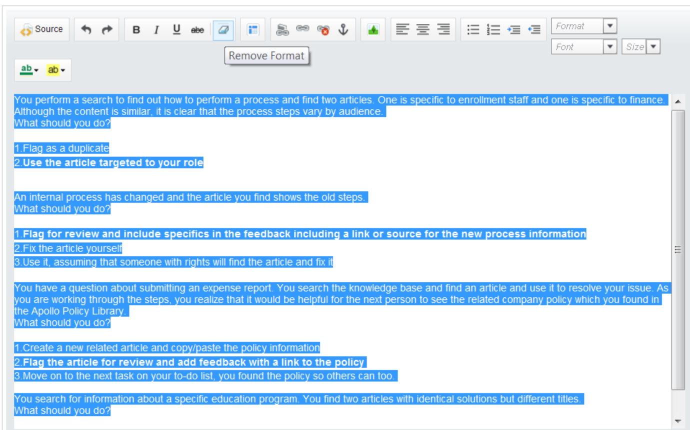


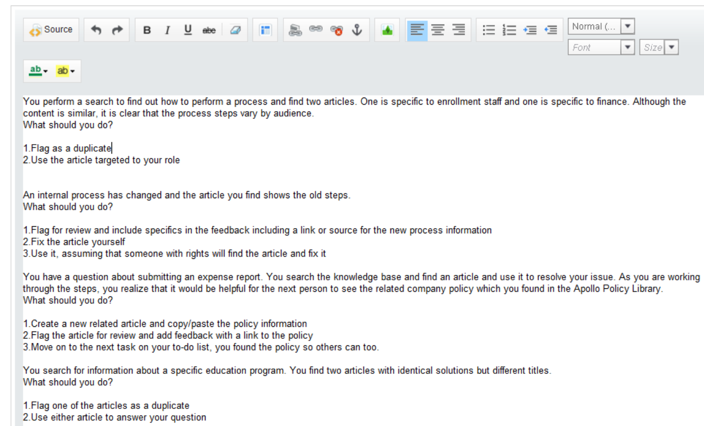
Slide

Toolbar- Eraser cont.

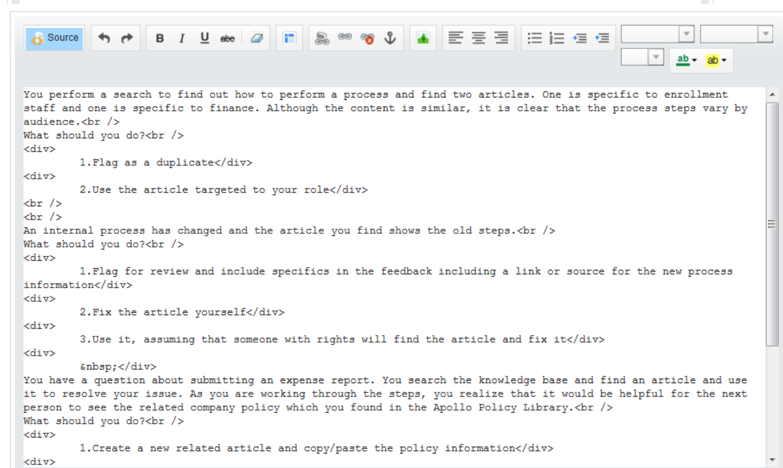


When you copy and paste text from Word or another document, it is a best practice to clear the formatting by selecting the text and clicking the **Eraser** button.



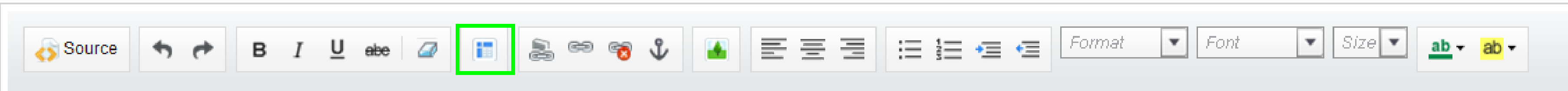


Now if you click the **Source** button, you will see all the extra code has been removed.

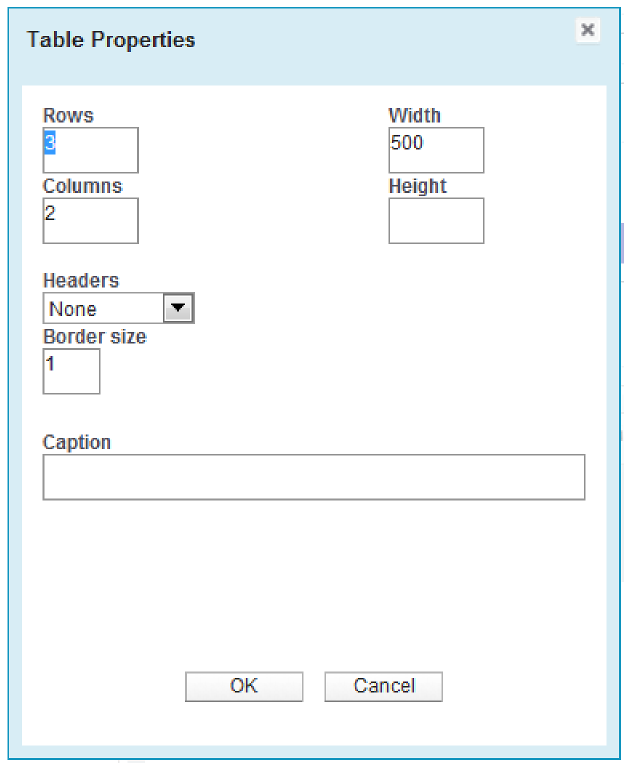


Slide

Toolbar- Table



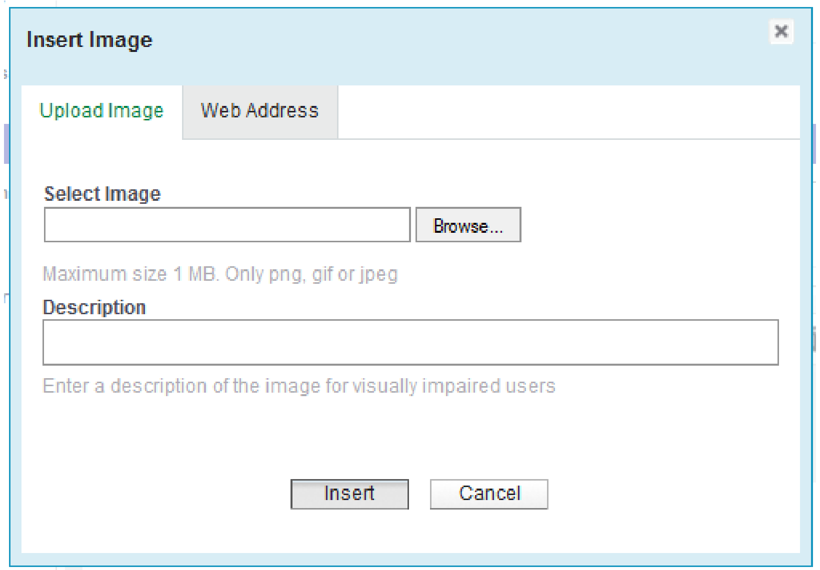
Use the **Table** button to insert a table.



Slide

Toolbar- Image

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

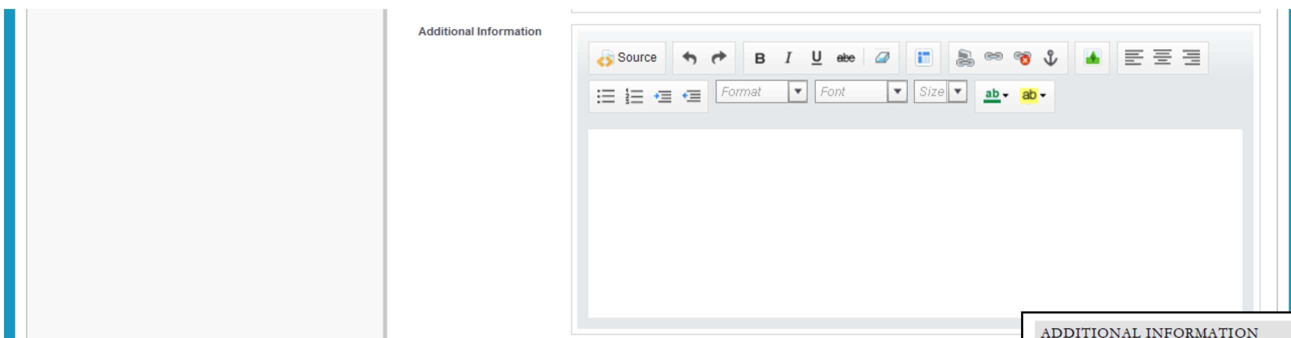


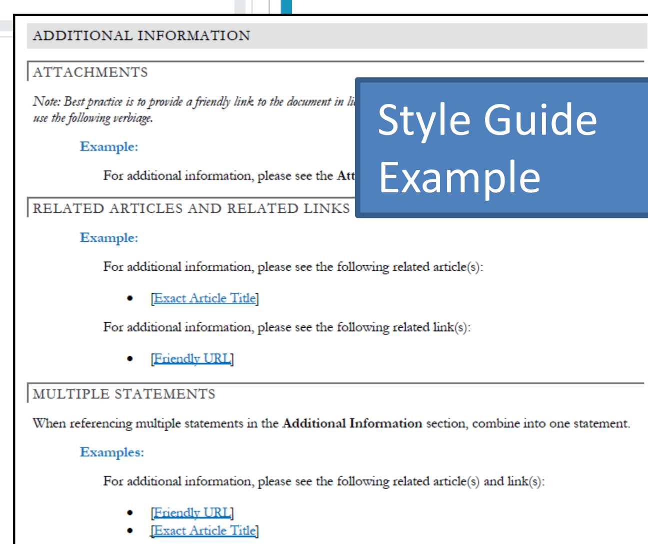
Only insert images when they add clarity to the article.

Slide

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).





ADDITIONAL INFORMATION

ATTACHMENTS

Note: Best practice is to provide a friendly link to the document in li
use the following verbiage.

Example:

For additional information, please see the **Att**

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:

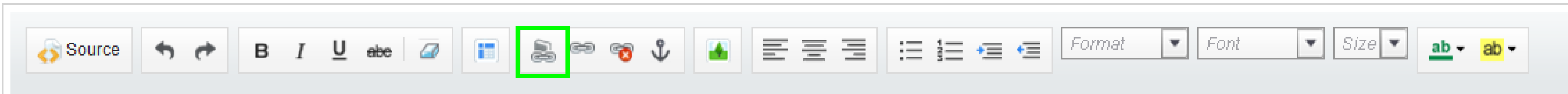
For additional information, please see the following related article(s) and link(s):

- [Friendly URL]
- [Exact Article Title]

Style Guide Example

Slide

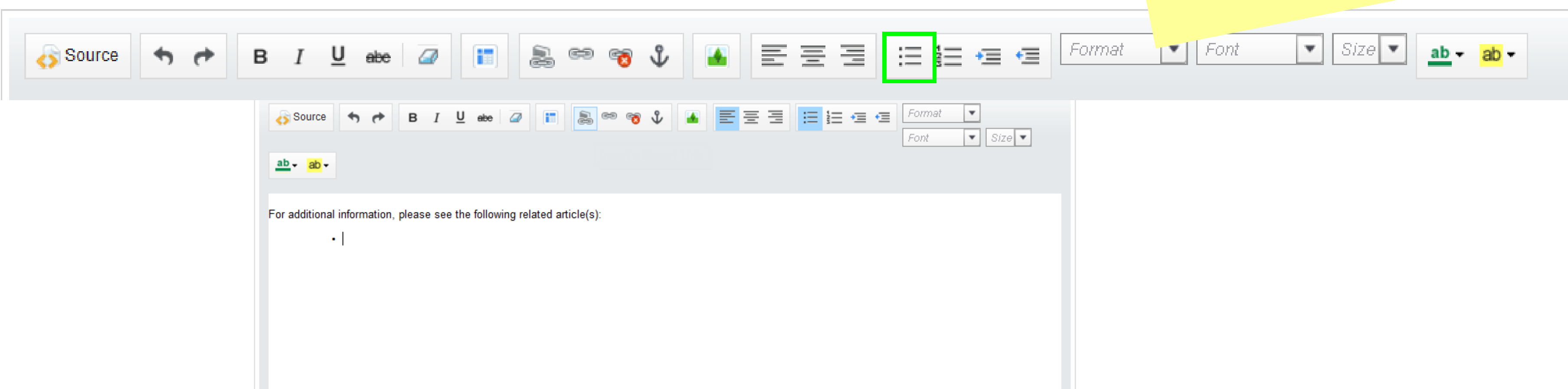
Smart Link



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.



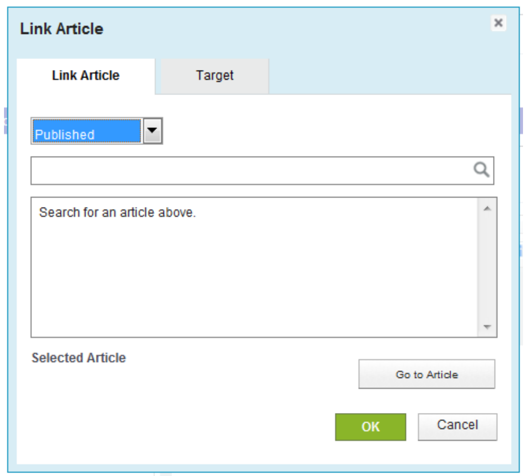
Slide

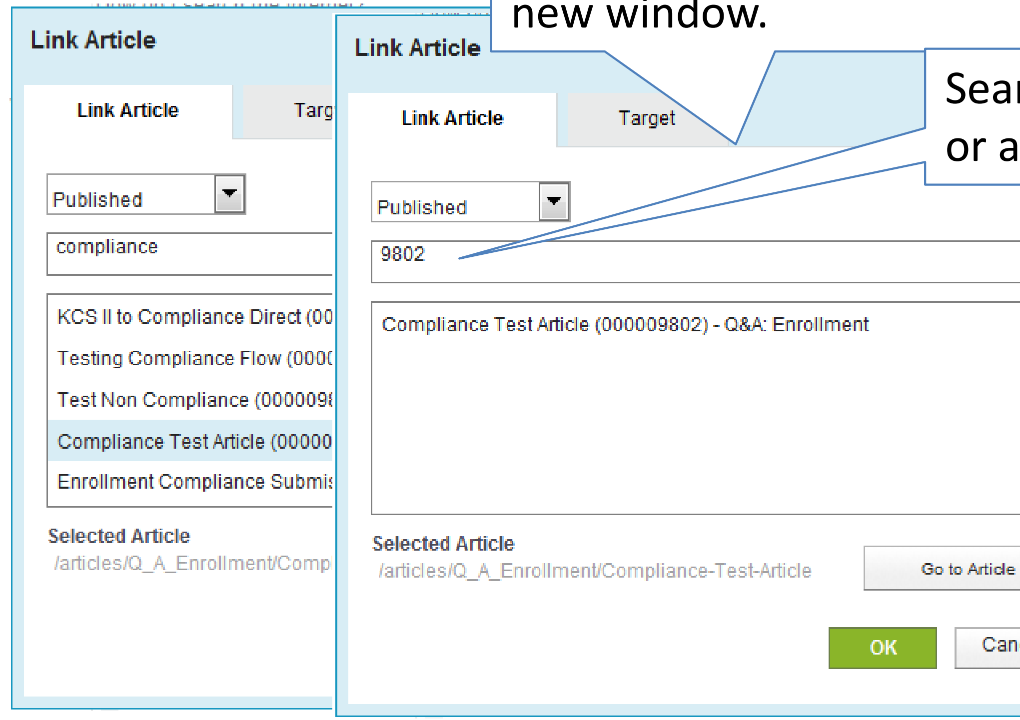
Smart Link- continued

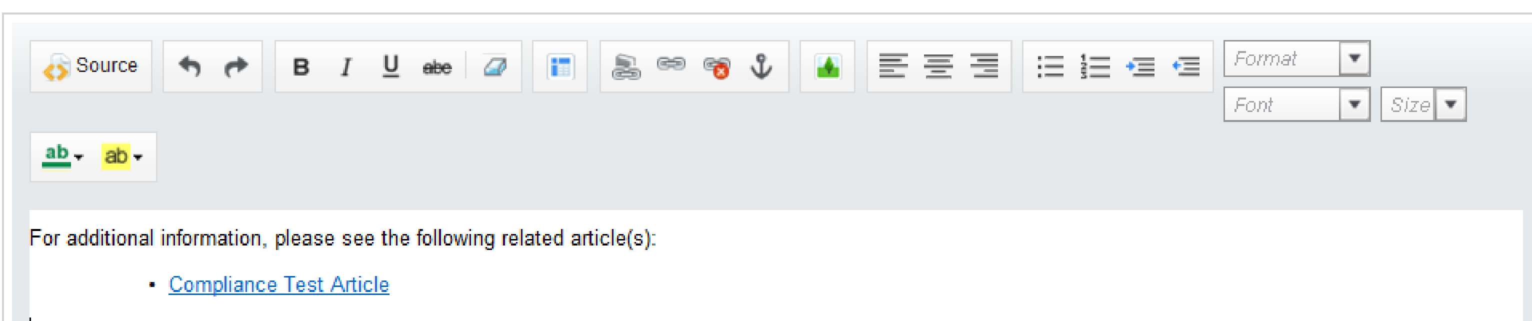
5. Search for the article
6. Select the desired article
7. Click **OK**

You can leave the **Target** ta
alone, by default links ope
new window.

Sear
or a







Slide

Link - Friendly URL

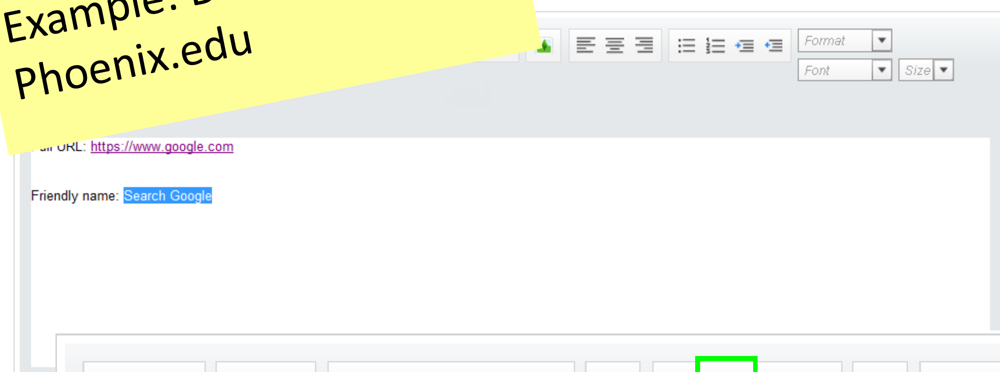
nternal site? Link with a Friendly URL

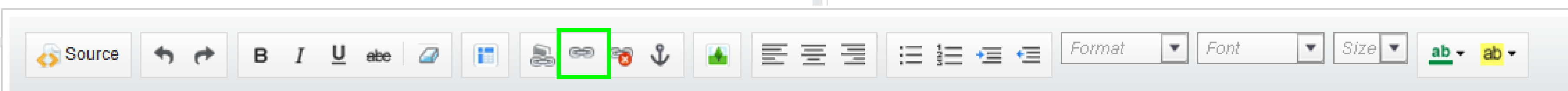
External/Student-facing site? Link with full URL Example: Directing to Phoenix.edu

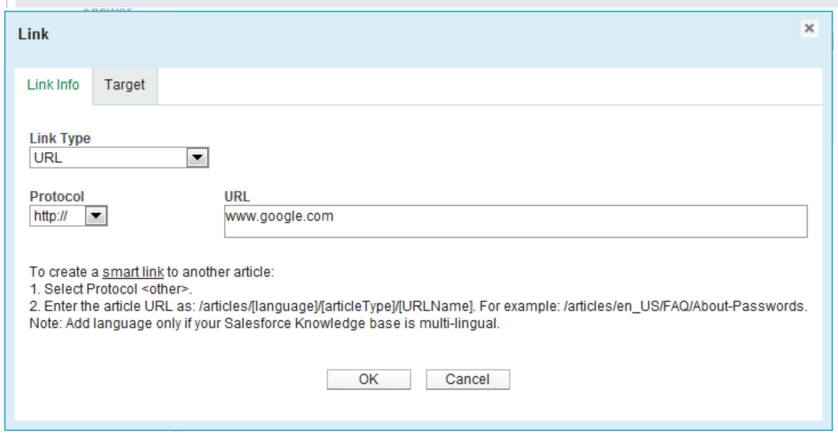
Linking to a Resource

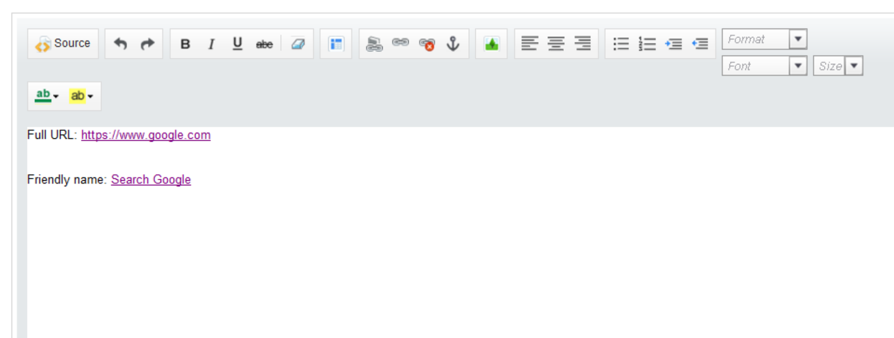
Friendly URL Name

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









Slide

Link - Full URL

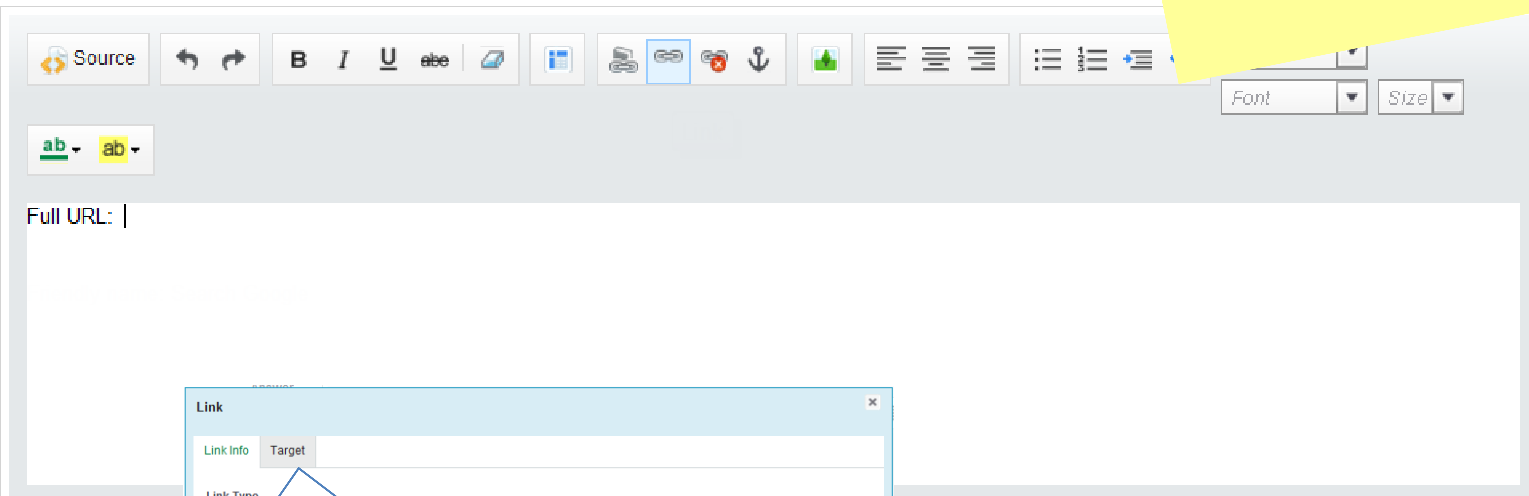
Linking to a Resource

Full URL

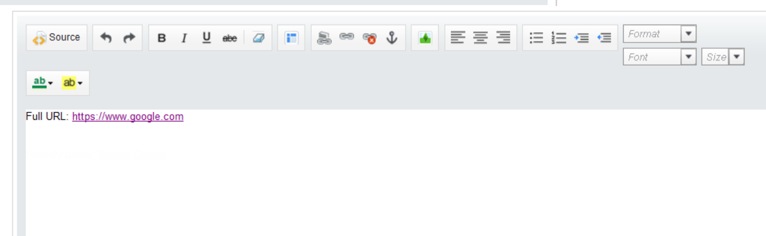
1. Click the **Link** button
2. Type the full web address in the URL field
3. Click **OK**

Internal site? Link with a friendly URL

External/Student-facing site? Link with full URL



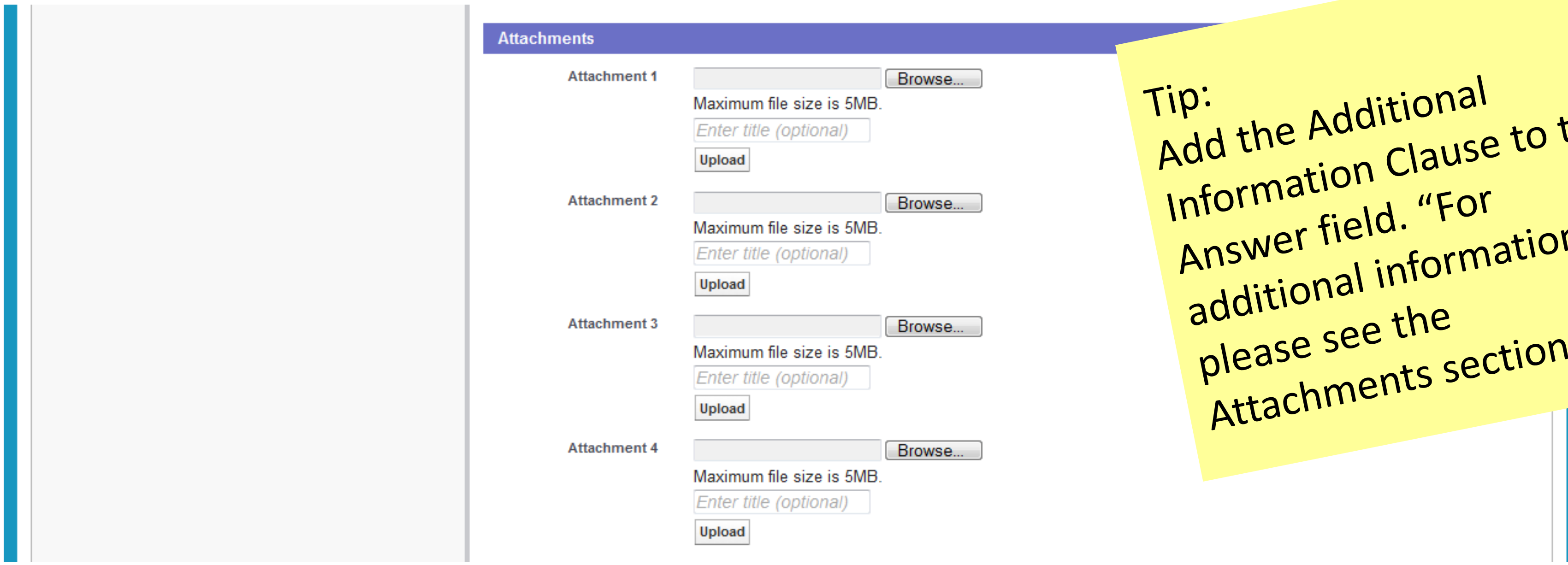
You can leave the **Target** tab alone, by default links open in a new window.



Slide

Attachments

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



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.

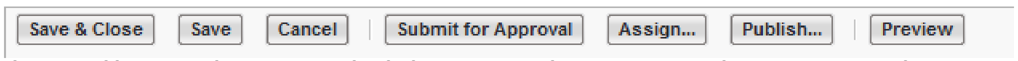
Slide

Compliance Article

Certain article topics of increased sensitivity require compliance approval.

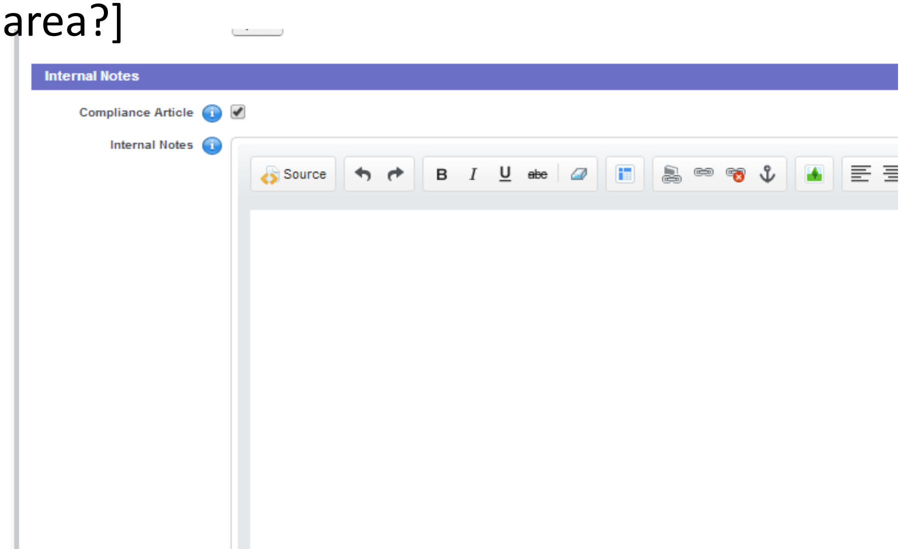
When creating a compliance risk article, perform the following:

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?]



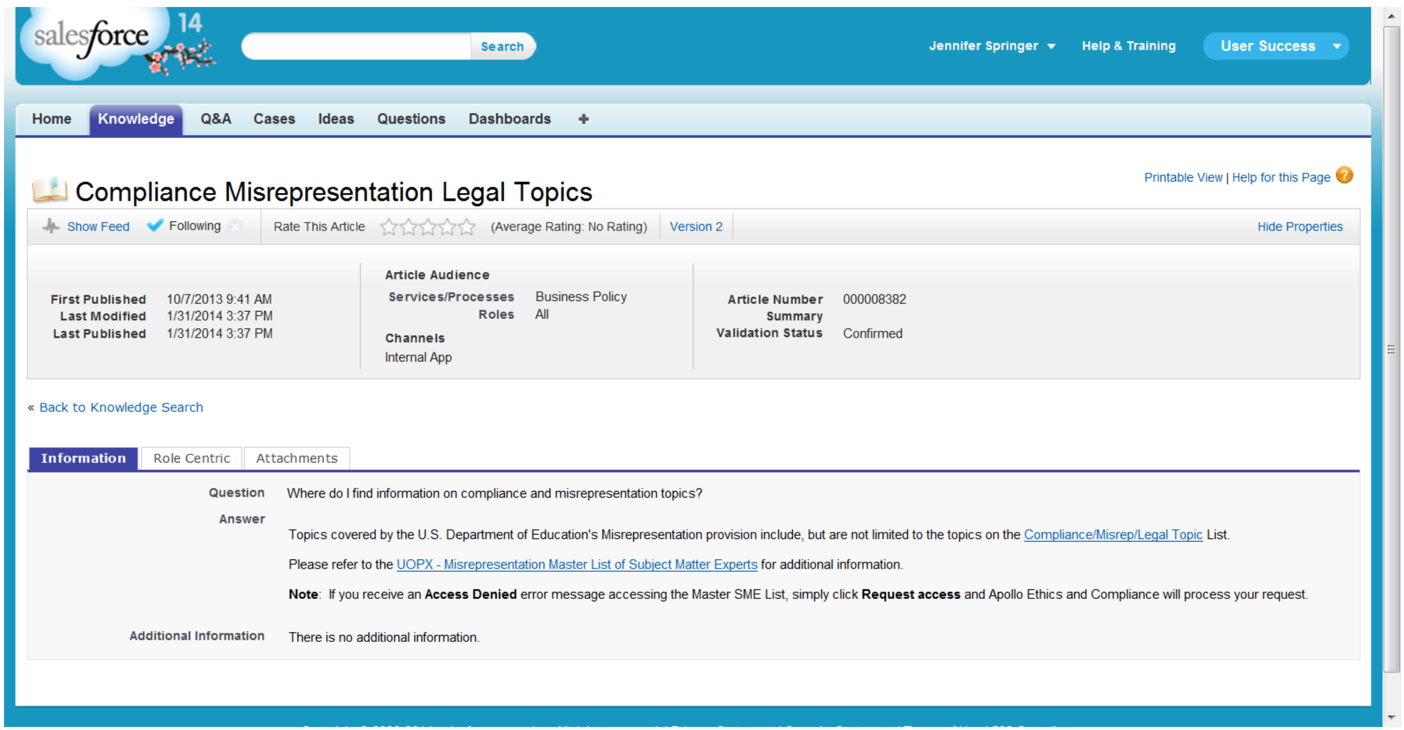
Slide

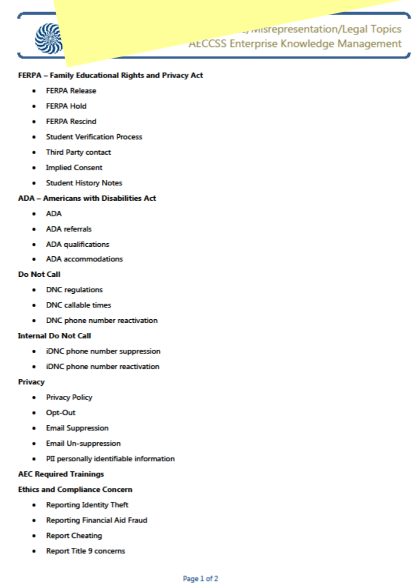
Compliance Topics

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 butto notifications automatically

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





/Misrepresentation/Legal Topics
AECCSS Enterprise Knowledge Management

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

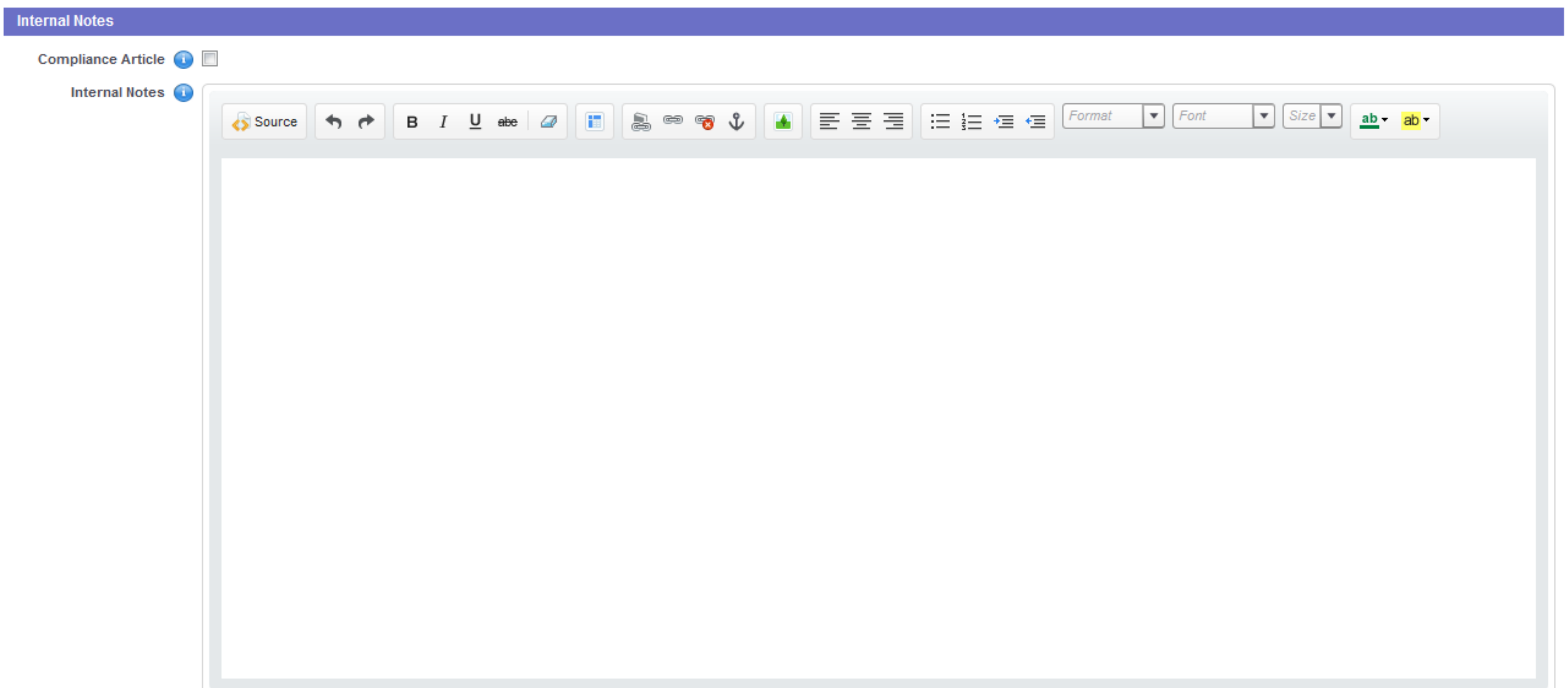
Page 1 of 2

Slide

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.



Slide

Select Data Categories

Roles

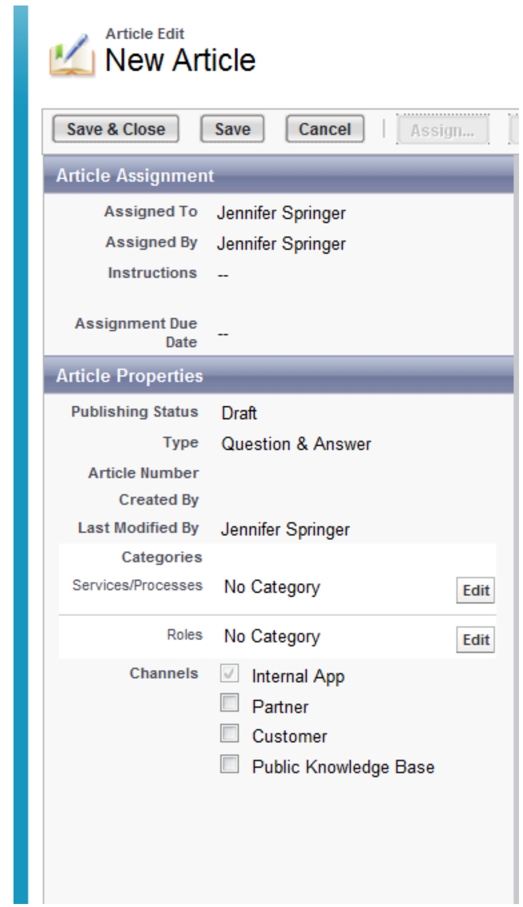
As we are in an everyone-sees-everything model, selecting a role will help narrow your search results.

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.

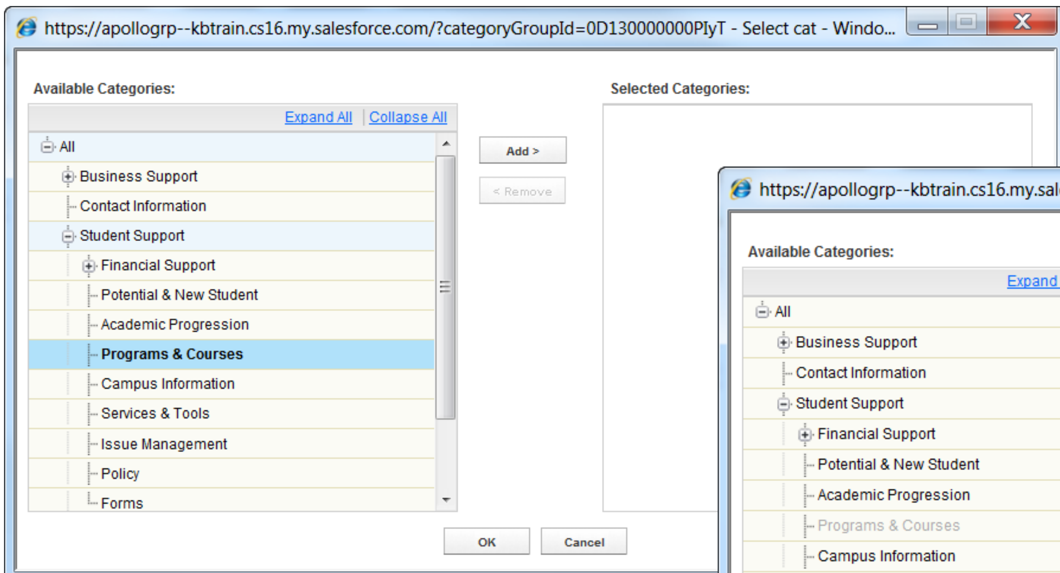
You can expect the data categories to change with the organization as more groups start using the tool.

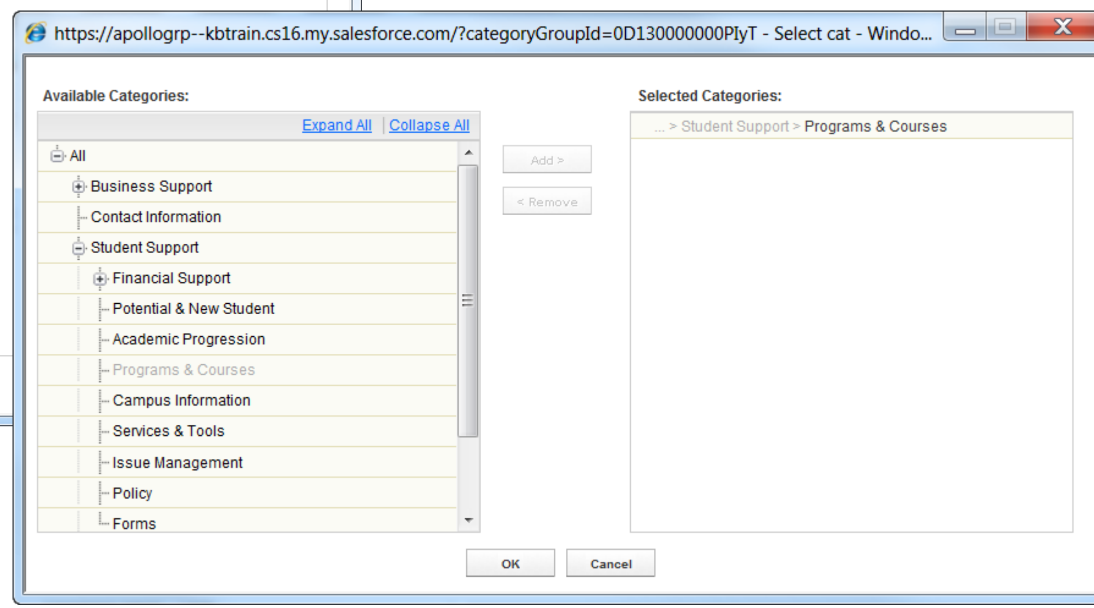


Slide

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.

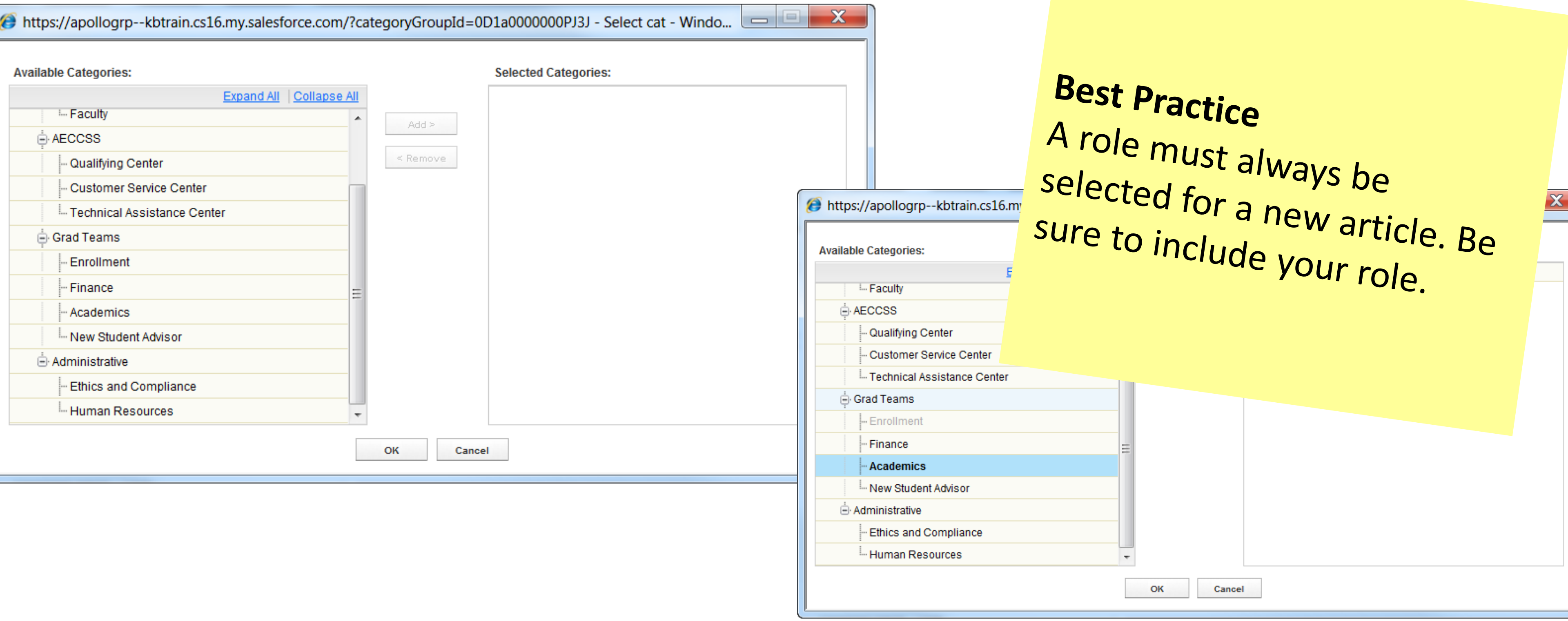




Slide

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.

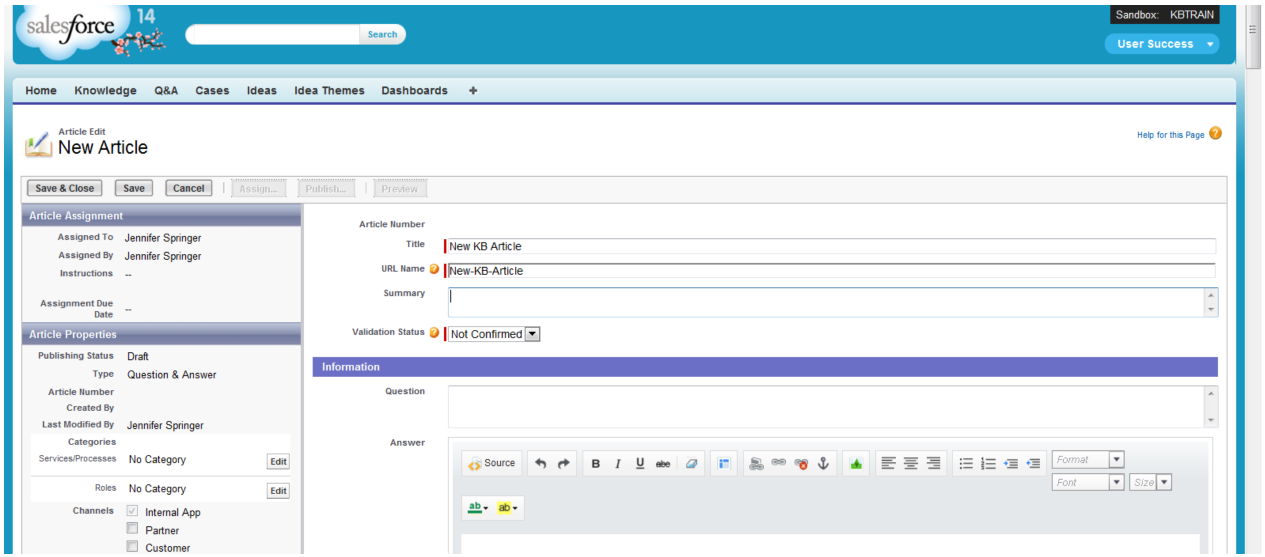
Slide 4.1a

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.

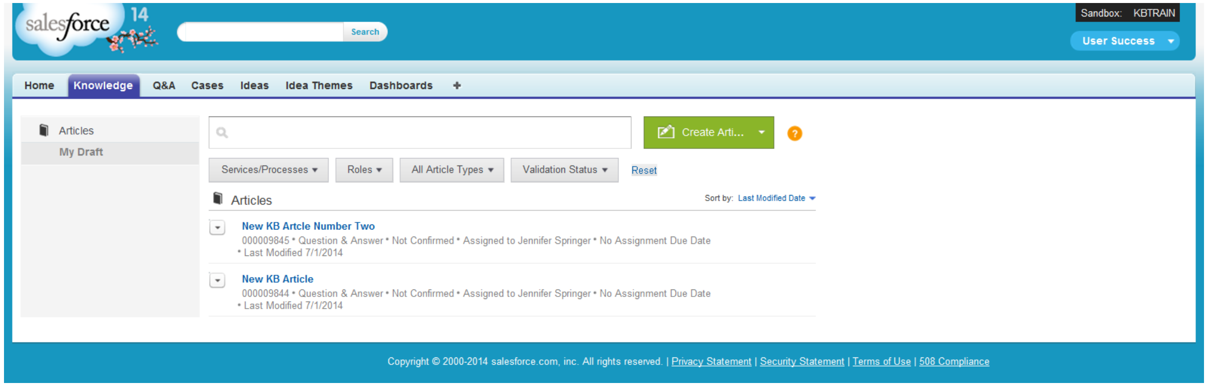


Success! “Article Title” has been saved as a draft.

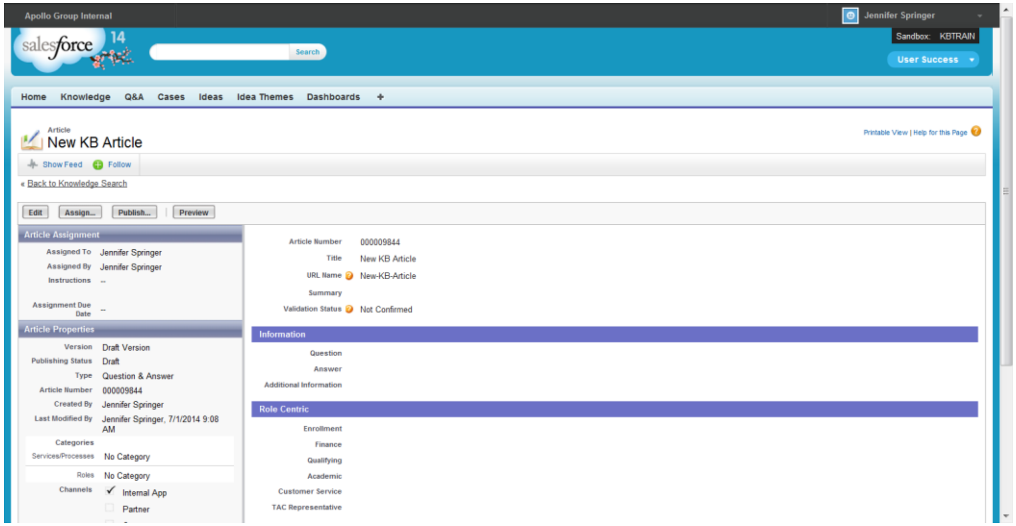
Slide 4.1a

View Draft Articles

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



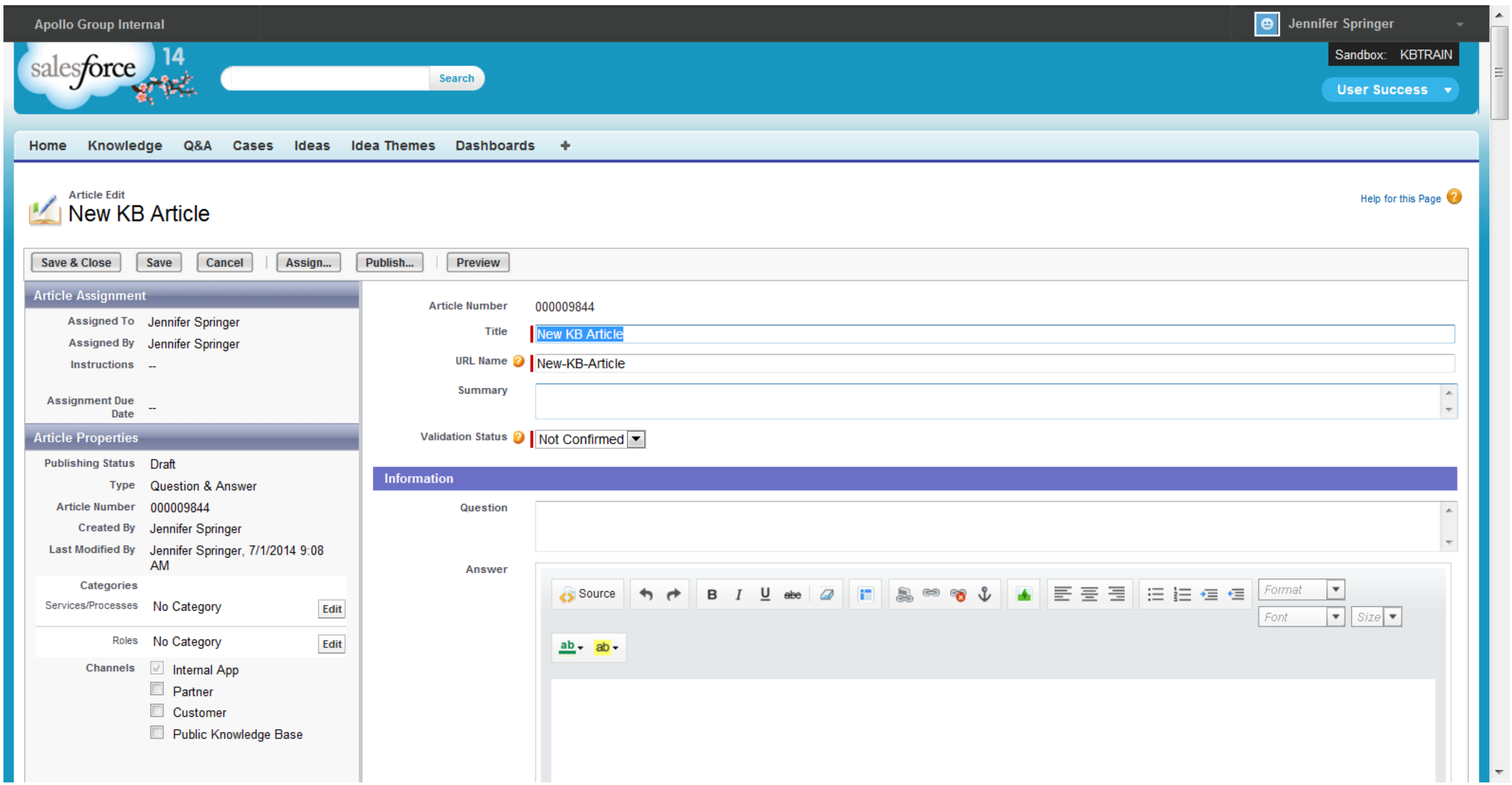
Click one of the article links to open the draft.



Slide

Edit Draft Article

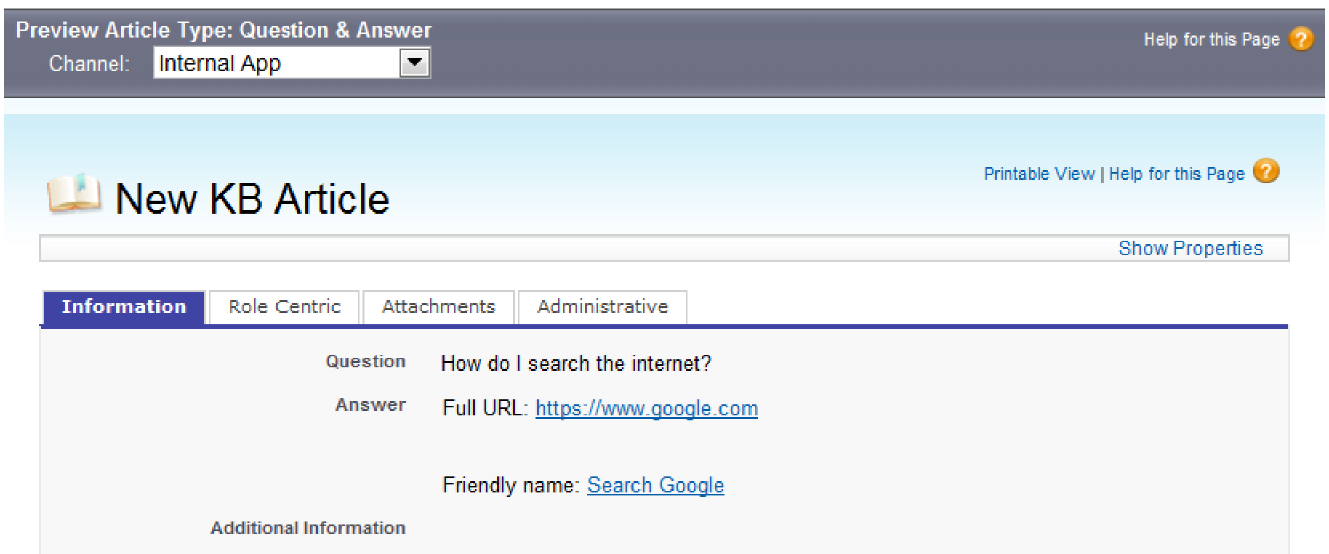
Click the **Edit** button to continue working on the article information.



Slide

Preview Draft Article

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

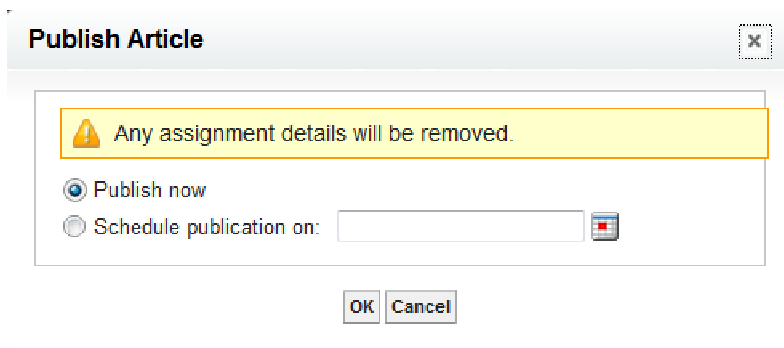


Slide

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

Additional Notes & Questions

Start Learning Button

Knowledge Check

Media Type

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.

Slide 1.1

Additional Notes & Questions

Multiple choice, can answer multiple times

Knowledge Check

Media Type

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

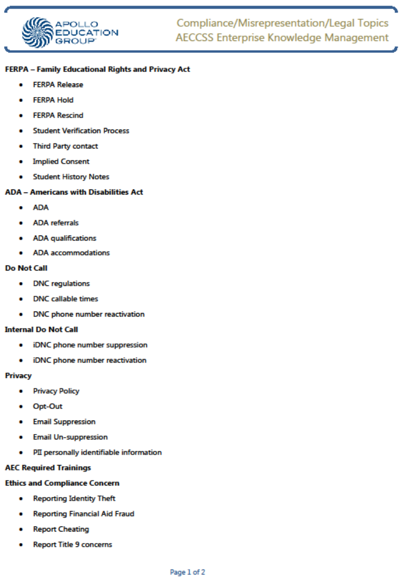
All are correct

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

Knowledge Check

Compliance risk



Compliance/Misrepresentation/Legal Topics
AECCSS Enterprise Knowledge Management

FERPA – Family Educational Rights and Privacy Act

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- FERPA Hold
- FERPA Rescind
- Student Verification Process
- Third Party contact
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- 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

Page 1 of 2

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?

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.

Slide 1.1

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.

Slide 1.1

Additional Notes & Questions

Knowledge Check

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

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

Additional Notes & Questions

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.