



Helpdesk & Knowledge Base Information

For ODT Staff

March 11, 2009

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LOGGING IN TO HELPDESK

The address of our Helpdesk is:

<http://helpdesk.opendoor.ca/Login.asp>

Your User ID and password will be assigned and emailed to you. Please change your password after you login for the first time.

You do this by clicking on *Change Password* from the main menu.

If you have forgotten your password, click on *Forgot your password?* and your password will be reset and emailed to you.

If you have any difficulties logging in, please contact the Support staff.



The screenshot shows the login interface for the Open Door Technology Inc. Helpdesk. At the top, there are three logos: 'opendoor TECHNOLOGY' (green and blue), 'Open Door Technology Inc' (blue), and 'IssueTrak' (blue). Below the logos is a blue header bar with the text 'Please Sign In'. The main content area is white and contains the following text: 'Helpdesk support is available M-F 8AM to 5PM MST.' followed by 'Login to Helpdesk to research past support issues, submit new ones and monitor solution progress of current issues.' Below this text are two input fields: 'User ID:' with the text 'odtuser' and 'Password:'. A green 'Sign In' button is positioned below the password field. At the bottom of the form, there is a link that says 'Forgot your password?'. A small question mark icon is visible in the top right corner of the main content area.

My SETTINGS

After logging in and changing your password, please update your user profile. Simply click on *My Settings* to open the following window:

opendoor TECHNOLOGY Open Door Technology Inc IssueTrak

Main Menu My Settings for ODT User printer friendly

Home
My Open Door Technology's Helpdesk
Dashboard
Dashboard Settings
My Issues
My Settings
Change Password
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
Reports
GoToAssist
Log Out

* Your TimeZone: Time Zone
(GMT-07:00) Mountain Time (US & Canada)
☒ Adjust dates/times during Daylight Saving Time

Default Home Page: Preferences
Next Actioned To Me
Dashboard Reload: 0 Minutes (Blank or 0 to use [System settings](#))
☐ Show Reload Timer on Dashboard page

Personal Info
Phone:
Email:
Pager Email:
Address:
City/State/Zip:
Country:

Update Reset * Required

You can change your Default Home Page here to one of the following:

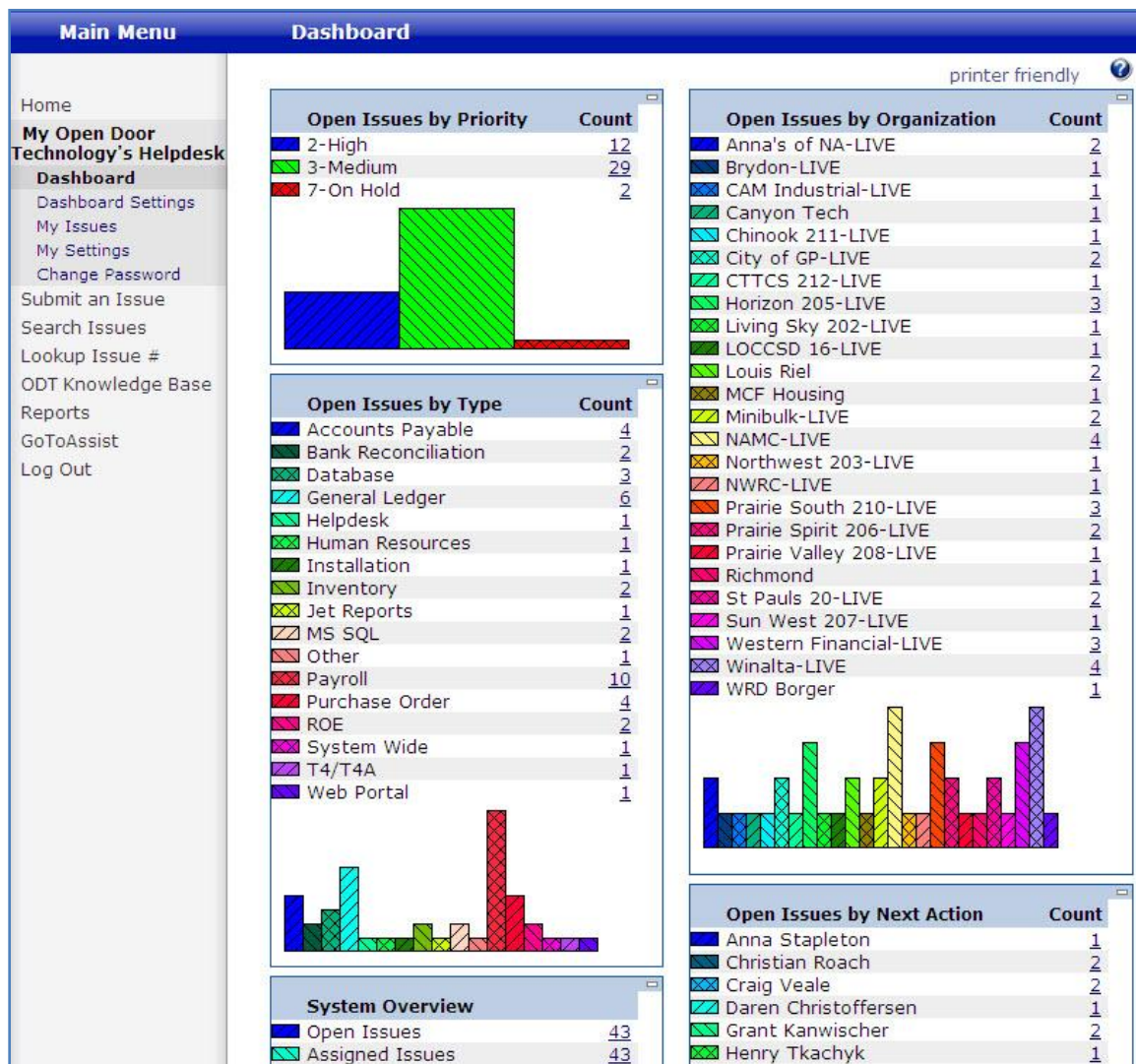
- Assigned To Me
- Calendar
- Dashboard
- ODT Knowledge Base
- Lookup Issue #
- My Issues
- Next Actioned To Me
- Reports
- Search Issues
- Submit Issue

Please verify your email address and phone number, make corrections if necessary. Be sure to put in your direct line and additional information as necessary.

If you select the Dashboard as your home page, you can also have this page auto-refresh by entering a value in the Dashboard Reload field. Putting a checkmark in the Show Reload Timer field displays a countdown on the home page.

DASHBOARD

You can view the Dashboard by clicking on Dashboard in the menu.



The Dashboard provides a quick view of all open issues.

Dashboard Settings

You can change the appearance of your Dashboard by clicking on Dashboard Settings.

Main Menu

Dashboard Preferences

Home

My Open Door Technology's Helpdesk

Dashboard

Dashboard Settings

My Issues

My Settings

Change Password

Submit an Issue

Search Issues

Lookup Issue #

ODT Knowledge Base

Reports

GoToAssist

Log Out

printer friendly

Select a Module: Issues By Compliance Status

Open Issues by Compliance Status	Count
In Compliance	43

Add to Left Column

Add to Right Column

Module Name: Open Issues by Priority

Start Expanded? ☒

Module Name: Open Issues by Type

Start Expanded? ☒

Module Name: System Overview

Start Expanded? ☒

Module Name: Open Issues by Substatus

Start Expanded? ☒

Module Name: Open Issues by Organization

Start Expanded? ☒

Module Name: Open Issues by Next Action

Start Expanded? ☒

Module Name: Current Qtr Performance

Start Expanded? ☒

Save

Reset

HOME

If you have not changed the Default Home Page setting, your home page is the Next Actioned To Me page. This displays a list of issues that are Next Actioned to you.

Main Menu

Home - Issues for ODT User

printer friendly ?

Home

My Open Door Technology's Helpdesk

Dashboard

Dashboard Settings

My Issues

My Settings

Change Password

Submit an Issue

Search Issues

Lookup Issue #

ODT Knowledge Base

Reports

GoToAssist

Log Out

Display Issues:

As Next Action

Newest Issues First

Press shift key when clicking links to open in a new window.

Issue #	Subject	Priority	Opened	Submitted By	Assigned To	Last Activity	Substatus
5862	Some users are unable to link documents	2-High	06-Mar-2009	Keilani Bell	Kelly Smith	11-Mar-2009	Awaiting Client Response

Symbol

Legend

E

Escalated Issue

Issue has Attachments

Issue is half-way Out of Compliance

Issue SLA is Out of Compliance

You can also choose how you would like this list to be sorted:

- Newest Issues First
- Oldest Issues First
- By Priority
- By Last Activity Desc

The Substatus field is extremely useful as it quickly reminds you whether you need to address an outstanding issue or whether you are simply awaiting an update from the client.

HELPDESK ISSUES

You can then click on one of these issues to open it. The header information displays issue number.

Main Menu		View Issue #5862	
Home		printer friendly email issue ?	
My Open Door Technology's Helpdesk		Add Note	
Issue Detail		System Clock Paused	
View		Issue #: 5862	
Add Note		SLA in Effect: NONE	
Attachments		Issue Status: Open - Awaiting Client Response history	
Next Action		Subject: Some users are unable to link documents	
Edit		Issue Type: MS SQL	
Create KB Article		Priority: 2-High	
Clone/Copy		Severity:	
Submit an Issue		Organization: Anna's of NA-LIVE history	
Search Issues		Company Name in Navision:	
Lookup Issue #		Area: MS SQL	
ODT Knowledge Base		PO Number:	
Reports		Database: MSSQL 2005	
GoToAssist		Executable Version: MBS-Navision 5.0 SP1	
Log Out		Organization Type: Corporate	
		Submitted By: Keilani Bell on 06-Mar-2009 9:41AM 403.601.4922 x26 history	
		Entered By: Kelly Smith on 06-Mar-2009 9:41AM 877.777.0396 x206	
		Assigned To: Kelly Smith on 06-Mar-2009 9:41AM 877.777.0396 x206 details	
		Next Action: ODT User on 11-Mar-2009 10:02AM 877.777.0396 x206 details	
		Kelly Smith on 10-Mar-2009 9:01AM 877.777.0396 x206 details	
		ODT User on 09-Mar-2009 4:48PM 877.777.0396 x206 details	
		Kelly Smith on 06-Mar-2009 9:41AM 877.777.0396 x206 details	
		Email Notification: View/Maintain Distribution List...	

Key fields on the issue:

Printer friendly

Click on this option to view the issue in a printer friendly format.

Email issue

Click on this option to email this issue to others.

Issue Status

This displays both the status and substatus for the issue. Clients can modify the substatus field.

Priority

Similar to the substatus field, but the clients cannot modify this field.

Organization

The client site that is experiencing the problem.

Note: Only clients that have "LIVE" in their organization name have access to the Helpdesk.

Submitted By

This is the person who either submitted the issue or is the main contact for this issue.

This person receives email notifications when:

- Issue submitted
- Noted added
- Issue assigned
- Issue closed

Entered By

This is the person who actually entered the issue in the Helpdesk. Does not receive any email notifications for the issue.

Assigned To

This is the Support person to whom the issue is assigned.

- This person receives email notifications when:
- Issue submitted
- Noted added
- Issue closed
- Next actioned to is changed
- Issue assigned

Next Action

This is the ODT staff member who is presently working on the issue.

- This person receives email notifications when:
- Noted added
- Issue assigned
- Issue closed

Note: it is not necessary to Next Action the issue back to the Assigned To person, unless this person is required to work on the issue.

Email Notification

If you wish to include others in the email distribution for this issue, add them here.

Email Issue

To email an issue, click on the Email issue link at the top of the Issue window. You will be given the option to include private notes before the Email Issue window opens.

Email Issue

To:

From: ksmith@opendoor.ca

Subject: Issue #5862: Some users are unable to link documents (Anna's)

☐ Include attachments?

☒ Add note to issue to record sending this email?

☐ Make note private?

☐ Include message text in note

Any message added below will be included in email and, if the option is selected, added as a note to the issue.

Message:

B I U Font

Issue Content:

B I U Font

The following issue has been submitted to Open Door Technology's Helpdesk:
To view this issue in detail, click [HERE](#).

Priority: 2-High

Organization: Anna's of NA-LIVE

To

You can enter the email address or click on the address icon and select someone from the user records.

Include attachments

Place a checkmark here to include the issue's attachments in the email.

Add note to issue to record sending this email?

Place a checkmark here if you wish to have a record of this email in the issue.

Make note private?

Place a checkmark here if you do not want the client to view this note.

Include message text in note

If you have entered an additional message in the email, place a checkmark here if you wish to include this message text in the issue.

Message

Enter the additional message in this field.

Send

Click here to send the email.

Cancel

Click here to cancel sending this email.

Email Notification

If you wish to include others in the email distribution for this issue, add them here.

Issue Email Notification List -- Some users are unable to link documents

[Back](#)

[Add new user](#)

Users listed below will receive email and/or pager notification when the selected issue events occur.
Notifications for specific issue only:

Display Name	Notify Due To	On Submit		On Assign		On Next Action		On Note		On Close		On Escalate	
		Email	Pager	Email	Pager	Email	Pager	Email	Pager	Email	Pager	Email	Pager
No Email Distributions have been defined													

Users listed below will receive notification for this issue based on other issue related criteria as noted.

Display Name	Notify Due To	On Submit		On Assign		On Next Action		On Note		On Close		On Escalate	
		Email	Pager	Email	Pager	Email	Pager	Email	Pager	Email	Pager	Email	Pager
Submitter	Default	✓		✓				✓		✓			
AssignedTo	Default					✓		✓		✓			
NextAction	Default					✓		✓		✓			
Enterer	Default												

Edit Email Notification Record

Name: Hark Dhunay

Issue: **Some users are unable to link documents**

	Email	Pager
On Submit:	<input type="checkbox"/>	<input type="checkbox"/>
On Assign:	<input type="checkbox"/>	<input type="checkbox"/>
On Next Action:	<input type="checkbox"/>	<input type="checkbox"/>
On Note:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
On Close:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
On Escalate:	<input type="checkbox"/>	<input type="checkbox"/>

[Update](#) [Reset](#)

- Click Add new user, to open the Select Users window. Select the user.
- Click Edit next to the user's name.
- Place checkmarks in the On Note and On Close fields.
- Click Update.
- Notice the user now has checkmarks in the On Note and On Close fields.
- Repeat for each user that has been added.
- Click Back to return to the issue.

Issue Email Notification List -- Some users are unable to link documents

Record successfully updated.

[Back](#)

[Add new user](#)

Users listed below will receive email and/or pager notification when the selected issue events occur.
Notifications for specific issue only:

Display Name	On Submit		On Assign		On Next Action		On Note		On Close		On Escalate	
	Email	Pager	Email	Pager	Email	Pager	Email	Pager	Email	Pager	Email	Pager
edit del Hark Dhunay							✓		✓			
edit del Daren Christoffersen							✓		✓			

Add Note

Click on Add Note to add comments and update the issue with your progress.

Main Menu
Add Note to Issue #5862

System Clock Paused

Home
My Open Door
Technology's Helpdesk

Issue Detail
View
Add Note
Attachments
Next Action
Edit
Create KB Article
Clone/Copy
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
Reports
GoToAssist
Log Out

Issue #: 5862
SLA in Effect: **NONE**
Issue Status: Open
Awaiting Client Response
history

Subject: Some users are unable to link documents
Issue Type: MS SQL
Priority: 2-High

Organization: Anna's of NA-LIVE
history

Company Name in Navision:
Area: MS SQL
PO Number:
Database: MSSQL 2005
Executable Version: MBS-Navision 5.0 SP1
Organization Type: Corporate

Submitted By: Keilani Bell on 06-Mar-2009 9:41AM
history

Note:

B
I
U
Font
3

Add Note

☐ Private Note

Enter the details in the Note window. You can cut & paste or type directly into this field. You are limited to 7000 character in this field (the 7000 is a limit on characters, spaces, and formatting). There is a spell check function as well.

Click Add Note and this updates the issue with your comments. *Be sure you click Add Note before clicking Attachment, otherwise you will lose the comments you have added!* Update the Substatus field. When you add a note, an email is sent to the Issue Submitter, the Next Actioned person, and the Assigned person.

If the comments contain sensitive information, place a checkmark in the Private Note field. If you are simply updating the issue with comments such as left a message for or returned phone call, do not set these comments to private, otherwise it appears as though no work is being done on the issue.

Always update the Substatus field!

Attaching Files

With the issue open, you can click on the Attachments menu option to open the Attachments window. Simply browse to the file location and click Save. You can attach up to three files at a time. If you need to attach more than three, click the Attachments option again. The Reset button removes the files you are about to attach, not the ones already attached to the issue.

An important thing to note, click the Attachments option *after* you have saved any notes you have entered into the issue. If you click Attachments before the notes are saved, you will lose everything you just typed.

Main Menu **Attachments for Issue #5862** printer friendly

Home
My Open Door
Technology's Helpdesk
Issue Detail
View
Add Note
Attachments
Next Action
Edit
Create KB Article
Clone/Copy
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
Reports
GoToAssist
Log Out

To add attachments, first select files and then press Save.

Issue #: 5862
Description: Some users are unable to link documents

Add Attachments

Filename:

Next Action

When the issue needs to be sent to another person in Open Door Technology to address, click on Next Action.

The screenshot shows a web application interface for assigning a next action to an issue. The title bar reads "Main Menu Assign Next Action for Issue #5862". In the top right corner, there is a "printer friendly" link and a "System Clock Paused" status. A left-hand navigation menu includes links for Home, My Open Door Technology's Helpdesk, Issue Detail (with sub-links View, Add Note, Attachments), Next Action (with sub-links Edit, Create KB Article, Clone/Copy), Submit an Issue, Search Issues, Lookup Issue #, ODT Knowledge Base, Reports, GoToAssist, and Log Out. The main content area features an "Update" button at the top. Below it, the issue details are displayed: Issue #: 5862, SLA in Effect: NONE, Issue Status: Open (with a "Submit to Implementer" dropdown and a "history" link), Subject: Some users are unable to link documents, and Issue Type: MS SQL. Further down, the Priority is set to 2-High, and the Severity is a dropdown menu with "descriptions" as a hint. The Organization is "Anna's of NA-LIVE" (with a "history" link). Technical details include Company Name in Navision, Area: MS SQL, PO Number, Database: MSSQL 2005, Executable: MBS-Navision 5.0 SP1, and Organization Type: Corporate. Submission history shows it was Submitted By: Keilani Bell on 06-Mar-2009 9:41AM (with a "history" link) and Assigned To: Kelly Smith on 06-Mar-2009 9:41AM. The "Next Action" field contains the letter "c" and a "hints" link. At the bottom, there is a "Note:" section with a rich text editor toolbar (including Bold, Italic, Underline, Font, Size, Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Table, Undo, Redo) and a large text area. A "Private Note" checkbox is located at the bottom left of the note window.

Similar to Add Note, you enter the details in the Note window.

In the Select Next Action field, type in the first few characters of the person's name you wish to Next Action the issue to, and click on the Magnifying Glass, and select the person from the pop-up window.

Select User Record <Previous Next> Page 1 of 1 (3 records total)

Display Name	Organization	Phone
Carrie Saunders	Open Door	780.442.0057 x209
Christian Roach	Open Door	403.777.2410 x106
Craig Veale	Open Door	403.777.2410 x148

Display Name: User ID:
Last Name: First Name:
Organization: Phone:

Be sure to outline what you would like this person what you would like them to do next, to avoid confusion.

Always update the Substatus field!

SUBMITTING ISSUES

Click on Submit an Issue to submit issues.

Main Menu

Submit An Issue

printer friendly

Home

My Open Door Technology's Helpdesk

Submit an Issue

Search Issues

Lookup Issue #

ODT Knowledge Base

Reports

GoToAssist

Log Out

Submit Issue

* Subject:

* Full Description:

* Issue Type:

Priority:

3-Medium

Issue Status:

Open

Company Name in Navision:

* Area:

PO Number:

* Database:

* Executable Version:

* Organization Type:

Next Action:

-Unassigned-

hints

Note:

☐ Private Note

Target Date:

dd-mm-yyyy

Required By Date:

dd-mm-yyyy

☐ Include Attachment(s)? (upload screen will display on submit)

Submit Issue

* Required

- Enter the Subject
- Type a detailed description of the issue or copy the issue from the email. Remember: there is character and space limit of 7000.
- Select the Issue Type.
- Set the Priority.
- Set the Issue Substatus.
- Type in the Company Name. Be sure you ask the client which company they are having the problem in, as many of our clients have multiple companies.
- Select the Area.
- Enter a PO Number, if applicable.
- Select the Database.
- Select the Executable Version.
- Select the Organization Type.
- Enter the Next Action By person.
- Enter a note, if desired.
- Set the Target Date and the Required by Date, if necessary.
- If you would like to include an attachment, check the Include Attachment box.
- Review the details, and click Submit Issue when complete.

LOOKUP ISSUE

You can quickly lookup an issue if you know the issue number by clicking Lookup Issue #.

Main Menu	Issue Lookup
Home My Open Door Technology's Helpdesk Submit an Issue Search Issues Lookup Issue # ODT Knowledge Base Reports GoToAssist Log Out	<div>printer friendly </div> <div>Issue Number: <input type="text"/></div> <div><input type="button" value="Lookup Issue"/></div>

Type in the issue number and hit Enter on your keyboard or click the Lookup Issue button.

CLOSING ISSUES

Only the Helpdesk staff can close issues. To have an issue closed, you must add a note to the issue stating that the issue can be closed. You must also update the Substatus to Ready to Close. This alerts the person to whom the issue is assigned that this issue can now be closed.

Be sure to include any additional details as to how the issue was resolved.

The screenshot shows a web-based helpdesk interface. On the left is a 'Main Menu' with links: Home, My Open Door, Technology's Helpdesk, Issue Detail, View, Add Note (highlighted), Attachments, Next Action, Edit, Create KB Article, Clone/Copy, Submit an Issue, Search Issues, Lookup Issue #, ODT Knowledge Base, Reports, GoToAssist, and Log Out. The main area is titled 'Add Note to Issue #5862'. It displays the following issue details: Issue #: 5862, SLA in Effect: NONE, Issue Status: Open (with a dropdown menu showing 'Ready to Close' and a 'history' link), Subject: Some users are unable to link documents, Issue Type: MS SQL, Priority: 2-High, Organization: Anna's of NA-LIVE (with a 'history' link), Company Name in Navision: Area: MS SQL, PO Number: Database: MSSQL 2005, Executable Version: MBS-Navision 5.0 SP1, and Organization Type: Corporate. Below these details, it says 'Submitted By: Keilani Bell on 06-Mar-2009 9:41AM' with a 'history' link. A 'Note:' section contains a rich text editor with the text: 'This issue may be closed. Confirmed with the client that the system is working correctly now. To resolve, had user delete the zup file.' There is an 'Add Note' button to the left of the text area. At the bottom, there is a checkbox labeled 'Private Note' which is currently unchecked. In the top right corner of the interface, it says 'System Clock Paused'.

Always update the Substatus field!

SEARCHING ISSUES

The Search Issues window allows you to search for issues within multiple fields and parameters.

Main Menu	Search Issues	
Home	<input type="button" value="Search"/> <input type="button" value="Reset"/>	printer friendly ?
My Open Door		
Technology's Helpdesk		
Submit an Issue		
Search Issues	Search Criteria Issue Status: <input type="text"/> <input type="text"/> Priority: <input type="text"/> Issue Type: <input type="text" value="Inventory"/> <input type="checkbox"/> Show Inactive Types Search All: <input type="text"/> Keyword Search. or Subject: <input type="text"/> Keyword Search. Notes: <input type="text"/> Keyword Search. Solution: <input type="text"/> Keyword Search. Company Name in <input type="text"/> * Navision: <input type="text"/> Area: <input type="text"/> PO Number: <input type="text"/> * Database: <input type="text"/> Executable <input type="text"/> Version: <input type="text"/> Organization Type: <input type="text" value="Corporate"/> <p style="text-align: right;">* wildcard searches allowed (ex: "ab*")</p> Submitted By: <input type="text"/> hints Entered By: <input type="text"/> hints Assigned To: <input type="text"/> hints <input type="checkbox"/> Ever Assigned To Assigned By: <input type="text"/> hints Next Action: <input type="text"/> hints Closed By: <input type="text"/> hints Organization: <input type="text"/> Issues: <input type="text"/> Cause: <input type="text"/> Target Date: <input type="text"/> Start: <input type="text"/> End: <input type="text"/> dd-mmm-yyyy Date Opened: <input type="text" value="This Year"/> Start: 01-Jan-2009 End: 31-Dec-2009 dd-mmm-yyyy Date Closed: <input type="text"/> Start: <input type="text"/> End: <input type="text"/> dd-mmm-yyyy Required By Date: <input type="text"/> Start: <input type="text"/> End: <input type="text"/> dd-mmm-yyyy Total Time Open: <input type="text"/> days <input type="radio"/> less than <input checked="" type="radio"/> more than <input type="radio"/> equal Adj Time Open: <input type="text"/> days <input type="radio"/> less than <input checked="" type="radio"/> more than <input type="radio"/> equal Labor Hours: <input type="text"/> hours <input type="radio"/> less than <input checked="" type="radio"/> more than <input type="radio"/> equal	
	Search Output Options Search Title: <input type="text" value="1-Corporate Inventory Issues for this year"/> Output: <input type="text" value="Brief List"/> <input checked="" type="checkbox"/> Include Criteria in Results Sort Order 1: <input type="text"/> Asc Sort Order 2: <input type="text"/> Asc Sort Order 3: <input type="text"/> Asc	Save New Search Retrieve Saved Searches
	<input type="button" value="Search"/> <input type="button" value="Reset"/>	

When searching by the text fields – ‘Search All’ or ‘Solution’ for example – you can perform multi-word searches by putting a semi-colon between words: How; create; article;.

You can limit your searches to particular users, organizations, dates and date ranges. And there are sorting options available, based on the search criteria you have chosen.

If you find yourself performing the same search over and over, you can save the search by clicking Save New Search. A list of your saved searches appears on the My Issues page.

Main Menu **Home - Issues for ODT User**

printer friendly ?

Show Open Issues

- Summary (includes **all** categories listed below)
- As Submitter (0)
- As Next Action (1)

My Reports **Hide Shared Reports**

1-Corporate Inventory Issues for this year (S)
1-Opened today *
2-Open Issues, by Org, then by Submitter *
3-Open Issues >30D, by Last Activity (S) *
4-Critical Issues (S) *
5-Payroll Related Issues *
7-Closed today (S) *

(S) Saved Search * Shared

Run Report Edit Report Delete Report

REPORTS

Saved Searches

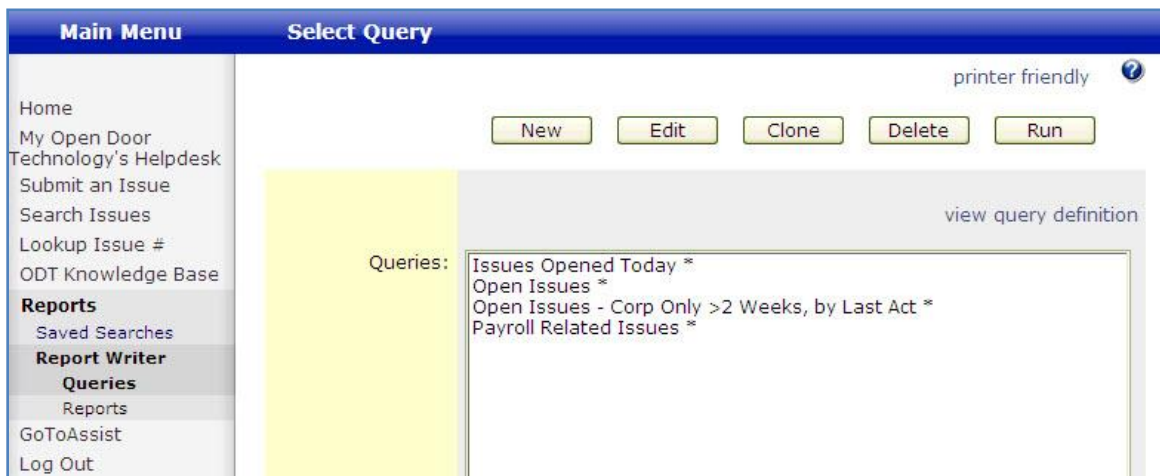
The Saved Searches is a listing of all searches that were created and saved under Search Issues. The list includes your own saved searches and others' saved searches that were shared.

You can run any of these reports, but you can edit or delete only the reports you created.



Report Writer

The Report Writer is a listing of Queries and Reports.



KNOWLEDGE BASE ARTICLE FEATURES & TIPS

Knowledge Base articles should be created for all Navision procedures, issues, information, and documentation that are of value to clients and ODT employees. This is an ongoing project and the Knowledge Base is continuously added to by ODT employees.

Knowledge Base Features

- Images (i.e. screenshots) cannot be placed in the Knowledge Base article text body.
- There is a character limit of 7,000. This 7000 limit includes both characters and spaces. If you try to submit an article that exceeds this limit, you will receive a web error screen. Unfortunately, when this happens you cannot reverse the submit action and you lose your article text, so be very careful! See below for recommended tips to avoid this.
- The font automatically defaults to “Times New Roman,” size 3 font. However, you can highlight the entire text and change the font.
- Enter semi-colons after each word when doing multi-word searches in Issues and Knowledge Base articles. For example: Creating; Knowledge; Article.

Knowledge Base Fields

Private

Place a checkmark in this field to limit the viewing of this article to ODT staff.

Title

Be sure to use a descriptive title that both the ODT staff and our clients will understand. For example: How to Create a Knowledge Base Article.

If an article is for Education Suite, type “Education Suite –” at the beginning of title. For example: Education Suite – How to Create a Knowledge Base Article.

Organization

This field must be populated with an organization. Either select the specific organization for this article, a selection that is rarely used; Open Door, for ODT only articles; 1-Non-resellers, for all other articles, these cannot be viewed by resellers; or 2-Resellers, for articles that can be viewed by resellers.

Category

Select the most appropriate category.

Sub Category

Select the most appropriate subcategory.

Keywords

Copy the title and remove common words such as “and” or “for.”

Text

Do not create your Knowledge Base articles directly in the article field. If the article exceeds the character limit, you will lose all of your work. Instead, create the document in Word, Notepad, or WordPad. Copying an article from Word directly into the Knowledge Base article also has some formatting quirks. It's best to remove all formatting by using Notepad or WordPad, then copying the final document into Knowledge Base.

Often the formatting changes after submitting the article. Review each article after submitting and edit and format within Knowledge Base as necessary.

Creating a Knowledge Base Article

- Create the article in Word, either by creating a document from scratch or by copying text from another source (Web page, Word Document, Adobe, etc).
- Edit as necessary – *Don't forget to do a Spelling & Grammar check!*
- Copy this completed document into WordPad or Notepad.
- Then copy from WordPad and paste into Knowledge Base article text body.
- Format article as necessary.
- Submit article.

If the article contains screenshots or exceeds the 7,000 word and character limit, you will receive an error message. Any new text entered or copied since the last submit will be lost.

If your article does exceed the limit and the article cannot be shortened without losing important content, then an attachment or link to the SharePoint site (Education Suite) is necessary. In the Knowledge Base text body, create a table of contents, step-by-step instruction summary, or a good description of the article, then attach full-length document. It's important to contain this information in the text body as attachments are not searchable.

Avoid the use of external links, as these become useless when these links are changed.

Formatting

To be consistent with the majority of ODT released documentation, format Knowledge Base articles in Arial, Size 3 font.

- Highlight entire article
- Select Font Type
- Select Font Size