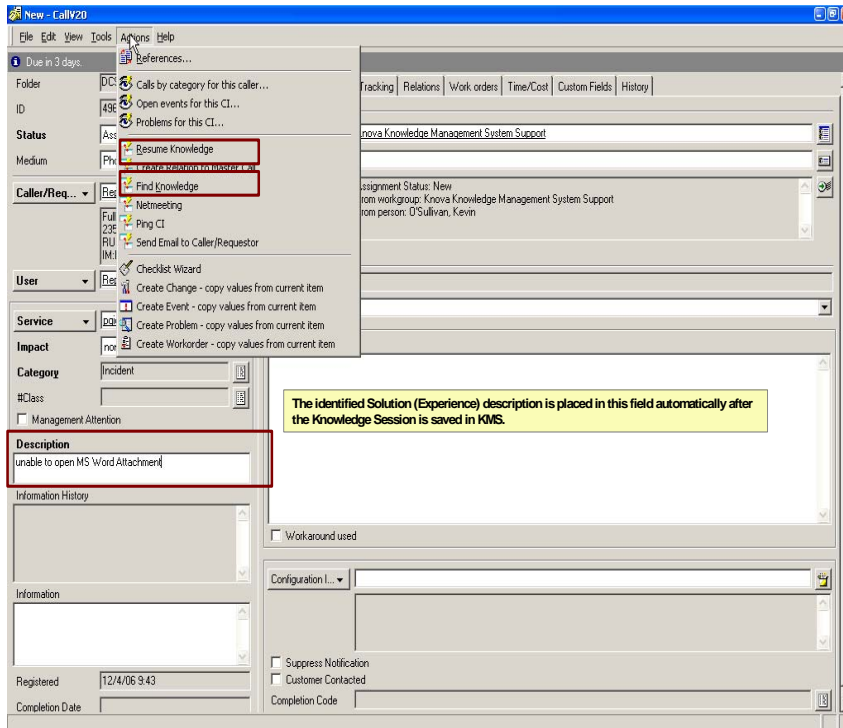


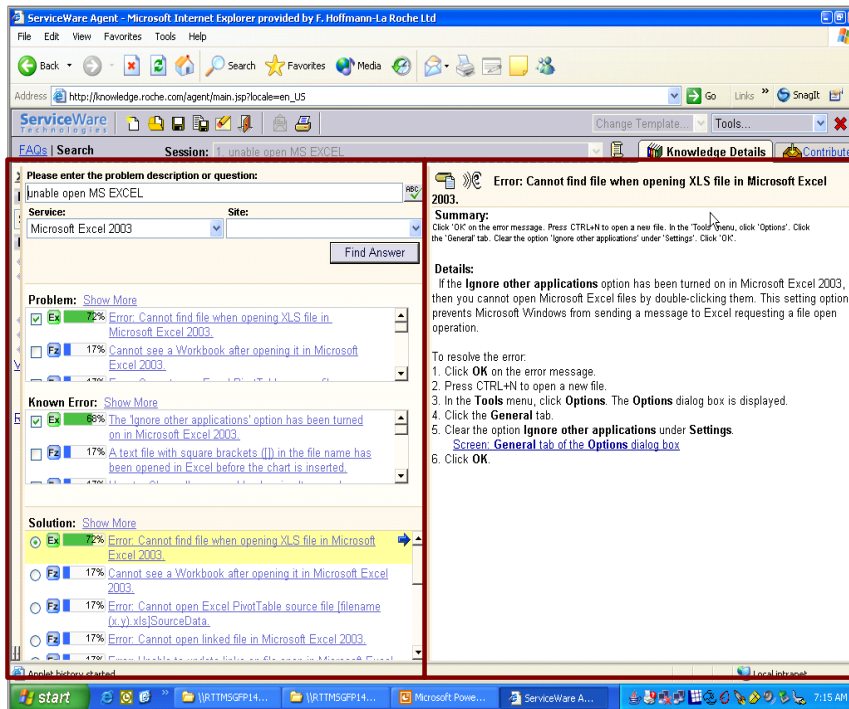


KMS - AGENT - Quick Reference Card

Launch, Search, Save and Retrieve KMS Functions



Service Desk - Call Ticket



KMS - Knowledge Session Pane

Launch KMS - Service Desk

1. Open new **Call Ticket**.
2. Complete **Requestor, Service and Impact** fields.
3. Record end-user incident or question in **Description** field.
4. Change **Default Workgroup** to your own.
5. Save Call Ticket.
6. Click **Find Knowledge** from the **Action Menu** to launch KMS.

Search Knowledge Base

1. The below occurs automatically after clicking **Find Knowledge**:
 - a. Initiate **KMS Knowledge Base** search.
 - b. Display end-user **Incident** in **KMS Search Description** field.
 - c. Display search results in **Pick Lists (Incident, Known Error, & Solution)**
 - d. Display **Case ID # - Service Call**, directly over Search Description field.
2. Narrow search by selecting appropriate **Product** from **Product Filter** list.
3. Narrow search by selecting appropriate **Site** from **Site Filter** for Local Products.
4. Click **Find Answer** button.
5. Match appropriate **Issue and Cause Concepts**.
 - a. **Experience - Green Path - Priority**
 - b. **Fuzzy - Blue Path**
6. Select Best-fit **Solution Concept**.
7. Save **Knowledge Session as Experience**, see below.

Save Search Experience

1. The below occurs automatically after clicking the **Save** icon on **KMS Toolbar**.
 - a. Save **Knowledge Session** to **KMS Knowledge Base as Experience**.
 - b. Generate unique **Experience ID #**.
 - c. Generate unique **Experience Solution Short Description** (for Append to Call Ticket)
 - d. Close browser and returns to display **Call Ticket** in **Service Desk**.
2. Click **Refresh (F5)**.
3. Click **Yes** to pop-up question to display Call Ticket with **Experience Solution Description** and **ID** populated.

Retrieve Saved Experience

1. Retrieve **Call Ticket** from **Service Desk Database**.
2. Click **Resume Knowledge** from **Action Menu**.
3. Launch and open **KMS**.
4. View original search **Knowledge Experience - Pick Lists (Issue, Cause, & Answers)**.

Knowledge Base Search Tips

Improve Your Search String

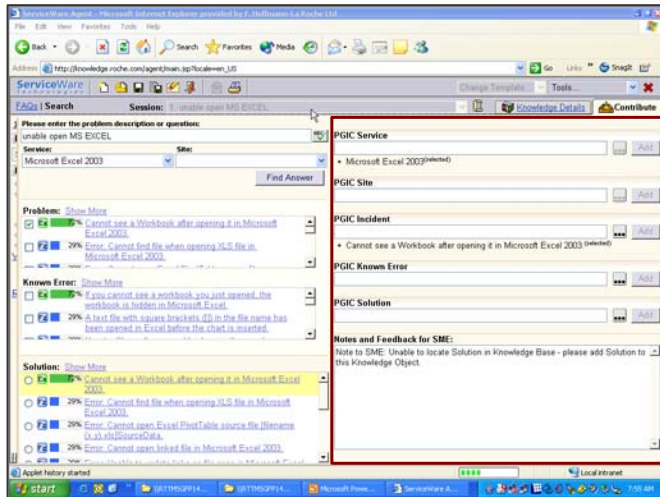
- Describe the incident, not the user, location, or previous issues.
- Use only standard terminology.
- Use abbreviations or acronyms as they are used in the current end user environment.

Search Framework

Match	Icon	Bar	Description
Text		Yellow	One or more words in the entered text are the same as, or similar to, the name of a Concept, one of its Synonyms.
Experience		Green	Based on the Concept selections, one or more matching Experiences are identified.
Fuzzy		Blue	Based on the Concept selections, one or more Experiences have been identified that include some of the same Concepts but describe a significantly different situation.

Contribute Knowledge Content and Feedback Functions

Knowledge Contribute Pane - Quick Contribution



Quick & Complete Contributions

1. Click **Contribute** Tab & Display **Knowledge Contribution** pane.

2. QUICK CONTRIBUTION – Typical Contribution

- a. Select appropriate **Product** from **Product Filter Menu**.
- b. Select appropriate **Site** from **Site Filter Menu**, as required.
- c. Select **Concept** from **Pick List** for Auto Complete and / or,
- d. Enter new **Concept Name(s)** in **Concept Type** text box(es), as required.
- e. Click **Add** button for each **Concept Name** entered for Contribution.
- f. Click **Save** icon to save **Knowledge Session** with new Contribution.

3. COMPLETE CONTRIBUTION – Optional Contribution

- a. Click on **Ellipse (...)** icon next to **Concept Type** for contribution.
- b. Display **New/Edit Concept** page.
- c. Select **Concept Type** from drop-down list.
- d. Enter **Name** of new **Concept**.
- e. Populate **Concept Properties**, as required:

Add Synonyms

- 1) Click **Add**.
- 2) Display **Add/Edit Remove Synonym** page.
- 3) Enter synonym and click **Create** and **Save**.
- 4) Return to **New/Edit Concept** page.

Add Short Description

- 1) Enter **Short Description**.

Add Long Description

- 1) Click **Edit** (long description).
- 2) Display **HTML Editor**.
- 3) Enter **Long Description**, click **Apply** and **Close**.
- 4) Return to **New/Edit Concept** page.
- 5) Click **Upload**.
- 6) Display **Upload Long Description** pop-up.
- 7) Select **Long Description** file and click **Upload**.
- 8) Return to **New/Edit Concept** page.

Add Attachments

- 1) Display **New/Edit Concept** page.
- 2) Click **Add** (attachment).
- 3) Display **Concept Add Attachment** page.
- 4) Click **Create** tab.
- 5) Select **File System Attachment** (Roche files) or **Web Attachment** (external URLs) and click **Continue**.
- 6) Display **Concept Add Attachment** page.
- 7) Enter **Name** (attachment).
- 8) Enter **Link** in Content Path:
 - **External** – HTTP, HTTPS or FTP.
 - **Internal** – Roche file path.
- 9) Select **Internal** in **Audience Availability** field.
- 10) Click **Add to List**.
- 11) Display new attachment in **Attachments to Add** list.
- 12) Select **New Attachment** and click **OK**.
- 13) Display **New Edit Concept** page.
- 14) Click **Add Concept**

NOTE: New Concepts are **not** saved until the Knowledge Session is **saved**.

Knowledge Object / Concept Guidelines

Concept Type	What is This Concept?	What Content is Included in Concepts?
Issue	A statement of the end user's problem or question	Detailed explanation of the problem or clarifying questions to confirm that the problem occurred
Product	The exact name of the product to which the problem refers	Supporting information about the product
Site	The PGI Site that owns a local product	Local product information.
Cause	A statement of the reason why the problem occurred	A list of questions or step-by-step procedures to help identify the specific cause
Answer	The answer or solution to the problem	The action or step-by-step procedures to resolve the problem

Knowledge Authoring Guidelines

Content Contribute Type	Components	Notes: Additional Reference Points
Quick Contribution	Concept Name Short Description Synonyms	1) Roche product / service documentation – Intranet pages 2) Roche Project Library 3) Roche employees 4) Industry people source
Complete Contribution	Concept Name Short Description Synonyms Long Description Attachments	5) Vendor and product Web pages 6) Vendor people source

Provide Feedback to SMEs

1. Click on a **Pick List Concept** (candidate for feedback)
2. Click on **Ear** icon (right of Pick List).
3. Display **Feedback** pop-up.
4. Record **Comments** on selected Concept.
5. Click **Send Feedback**.

Search Most Useful Solutions & FAQs

Most Useful Solutions (MUS)

1. Select and display appropriate matches from the **MUS** Menu.

Frequently Asked Questions (FAQ)

1. Select **Product** filter to narrow search.
2. Select **FAQ** from items displayed.