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Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Amy Max	Reviewing Unit:	PMO
Title:	Accessing and Creating Knowledge Articles SOP		
Description:	This document is the operating standard for accessing and creating Knowledge Articles.		

Accessing and Creating Knowledge Articles

Standard Operating Procedure

1. General Statement of Purpose
 - 1.1. The purpose of this document is to educate OMES IS employees how to access Knowledge Articles and to outline the process of creating them.
2. Scope
 - 2.1. This document is for all OMES IS employees.
3. Discipline
 - 3.1. General Standards
4. Terms and Definitions
 - 4.1. Knowledge Article – A short document that explains how to solve a problem. This document is generally more concise than a standard operating procedure and shorter in length than a user guide. Knowledge Articles can include screenshots or pictures, if necessary.
5. Instructions
 - 5.1. Accessing the Knowledge Articles
 - 5.1.1. The Knowledge Articles are located in the CRM Tool.
 - 5.1.1.1. Some articles are for public access while others may only be viewed by logging in with your Employee ID.
 - 5.1.1.2. Employees can access the Knowledge Base within the CRM Tool by clicking the **View** tab and then clicking **Knowledge**. In the Knowledge window that opens, employees can enter the desired topic and click the **Go** button.
 - 5.2. Creating a Knowledge Article
 - 5.2.1. When an OMES IS employee wants to create a Knowledge Article, they should click the **File** tab, **New** and then **New Knowledge Article** from within the CRM Tool.
 - 5.2.1.1. The author of the Knowledge Article should be the one submitting it in the CRM Tool.
 - 5.2.2. The employee should fill out the mandatory fields and any applicable fields. In the Solution or Workaround text box, they should enter the steps taken to reach the solution.
 - 5.2.2.1. There is also a **Visible in Customer Portal** checkbox which, when checked, will allow public access to the Knowledge Article, if approved. If the checkbox is not checked, the Knowledge Article will be limited to only OMES IS staff.

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5.2.3. When all the necessary fields have been filled, the employee must click the **Next: Submit New Article** link below the New status. This submits the Knowledge Article to the Knowledge Management team for approval.

5.2.3.1. If there are any questions about the submitted Knowledge Article, a member of the Knowledge Management team will contact the author.

5.2.3.2. Next, the Technical Writer will review the submitted Knowledge Article for content, formatting, spelling and grammar.

5.2.3.3. The Technical Writer will then advance the status of the submitted article to the other members of the Knowledge Management team for approval.

5.2.3.4. Once approved, the Knowledge Management team will publish the article to the Knowledge Base. The team will notify the author of the article's approval.

5.2.3.4.1. If the article is not approved, the Knowledge Management team will notify the author.

6. Roles and Responsibilities

6.1. Technical Writer

6.1.1. Edits the Knowledge Article, checking content, formatting, grammar and spelling.

6.1.2. Advances the status of the submitted article to the other members of the Knowledge Management team for approval.

6.2. Knowledge Management team

6.2.1. Contacts the submitted article's author with any questions.

6.2.2. Reviews submitted articles for approval.

6.2.3. Publishes article to Knowledge Base.

6.2.4. Notifies author of submitted article whether article is approved or not.

7. Limitation or Implementation Notes

7.1. OMES IS employees must have access to the CRM Tool to view the Knowledge Articles that are not meant for public viewing.