TimeTrak White Paper

Knowledge Base Features in TimeTrak

Knowledge Base features in TimeTrak

One of the hardest things to do today is to consolidate an organisation's knowledge and make it available in a way that assists all team members. TimeTrak Knowledge Base is available in TimeTrak Professional and TimeTrak Mobile, meaning that users can access information while out in the field.

There are almost unlimited uses for a Knowledge Base.

A Knowledge Base can be a question and answer forum, allowing team members to share their experiences and solutions with one another. A Knowledge Base can be a repository of organised documentation, contain Sales and Marketing information, tools for those in Field and Customer Service and store HR information.

When used properly a Knowledge Base can be an excellent tool for cataloging information, enabling and increasing collaboration, managing data, and assisting in self-learning.

The purpose of this whitepaper is to demonstrate how to enable and set up a Knowledge Base in TimeTrak, how to use it in TimeTrak Professional and TimeTrak Mobile, and give real world examples of the benefits.
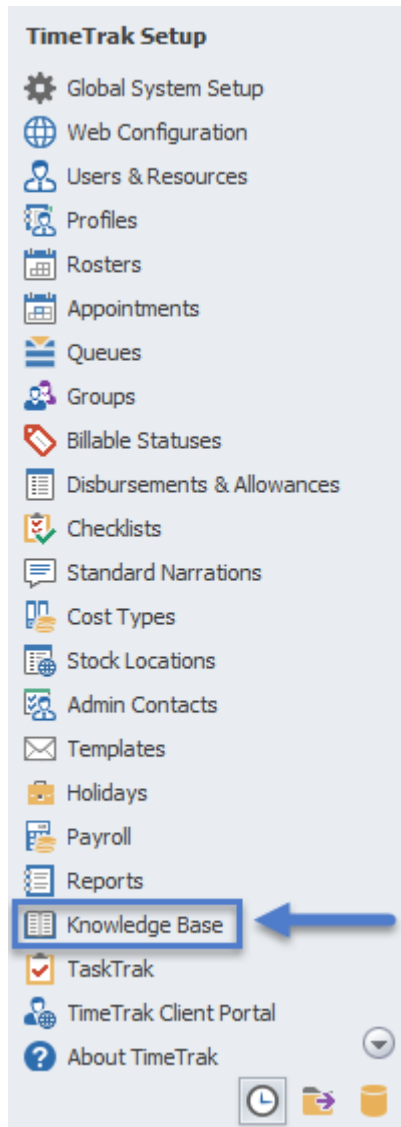
Contents

Setting up a Knowledge Base

To be prepared to set up a Knowledge Base, it is a good idea to have noted down what kind of information the Knowledge Base is going to contain and how that information is ordered.

A	B	C	D	E
HR Knowledge Base				
Category One	Sub Cateogory			
Administration				
Applicant Screening				
	Position Requirements			
Base Rates				
Coaching Methods and Tools				
	Self learning tools			
Company Policies				
Complicance				
	Work Place Standards			
	Health and Safety			
Employment Law	Contracts			
	Resigning			
Job Postings				
Orientation	New Staff Person			
	Existing Staff Person			

Once you have a structure in place, log in to the TimeTrak Admin Console.

Go to the Knowledge Base menu.

TimeTrak Setup

- ⚙ Global System Setup
- 🌐 Web Configuration
- 👥 Users & Resources
- 🔲 Profiles
- 📅 Rosters
- 📅 Appointments
- 📊 Queues
- 👥 Groups
- 🏷 Billable Statuses
- 📋 Disbursements & Allowances
- 📋 Checklists
- 💬 Standard Narrations
- 📊 Cost Types
- 📊 Stock Locations
- 📋 Admin Contacts
- ✉ Templates
- 💼 Holidays
- 📋 Payroll
- 📋 Reports
- 📖 **Knowledge Base** ⬅
- ☑ TaskTrak
- 👥 TimeTrak Client Portal
- ❓ About TimeTrak

Click on **Add** to create a new Knowledge Base.

Give the Knowledge Base a meaningful name. This name is what the Link will show in TimeTrak Professional and TimeTrak Mobile to access the information.

Set the **Allow Types.**
A Knowledge Base can have Articles and Questions.

- An **Article** is designed to contain a specific piece of information. Comments are allowed but often this will be disabled as the information is set and not up for discussion.

- A **Question** is designed to have answers and team members can vote on the answers until one answer is selected as the solution.

Now set up the **Categories** and their **Sub Categories.**

These are the groups for the information that is either an Article and/or Question.
Click on the Plus Icon to create a Category.

A new pop up will show with the Title of Category.
Enter in the Name of the first Category.

Tip: *This screen looks very similar to the Knowledge Base set up screen and to the Sub Category Screen so it is **important** to read the Title of the screen to make sure you are in the correct place.*

Click OK to save the Category.
A Category can be edited and deleted from the main Knowledge Base Screen.
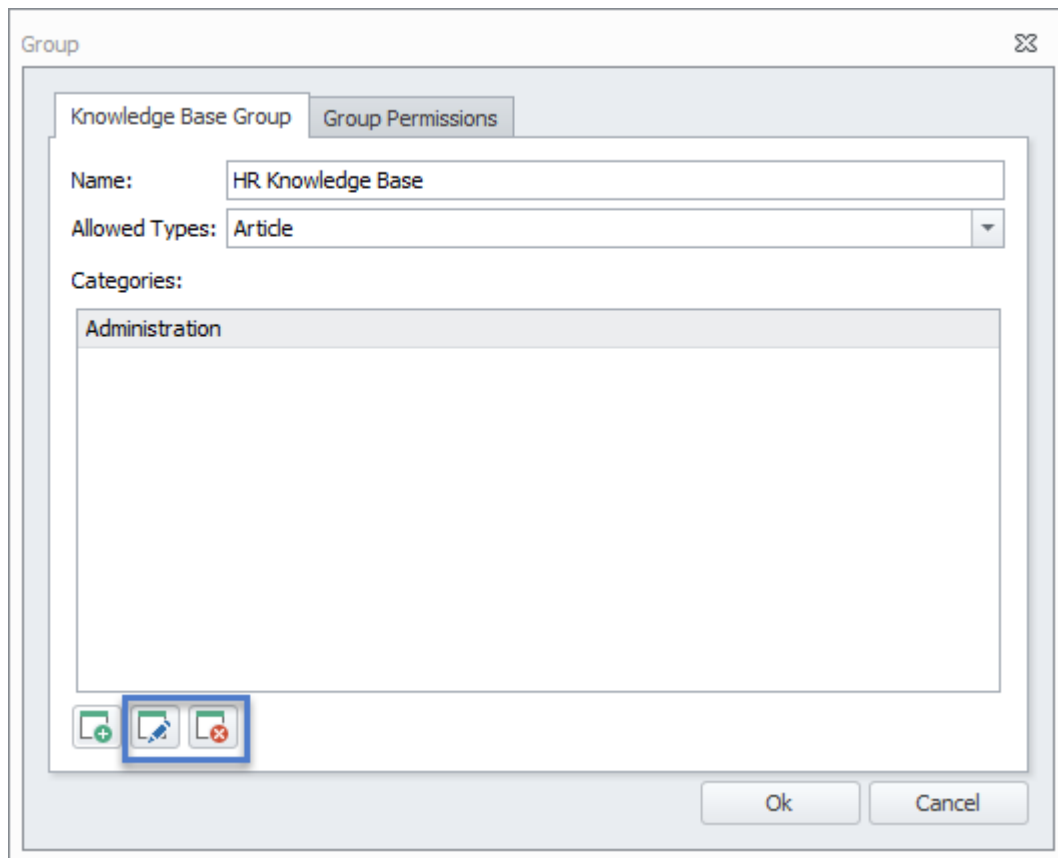
Important: If a Knowledge Base or its Categories are deleted then all references to Articles and Questions will be removed from the database and lost. Users will be warned.
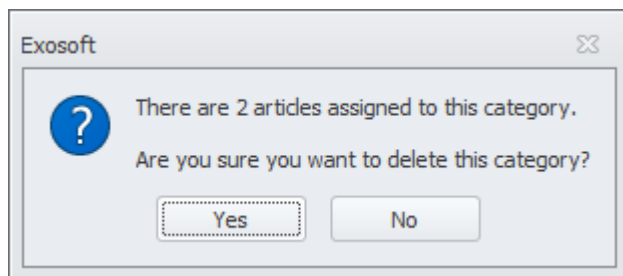
A Category can have a Sub Category and that Sub Category can have a Sub Sub Category and so on. Best practice is to have three levels of Categories; this keeps the Knowledge Base screens easy to use in TimeTrak Professional and Mobile.

To add the Sub Categories keep clicking on the Plus Icon in each layer of Category.
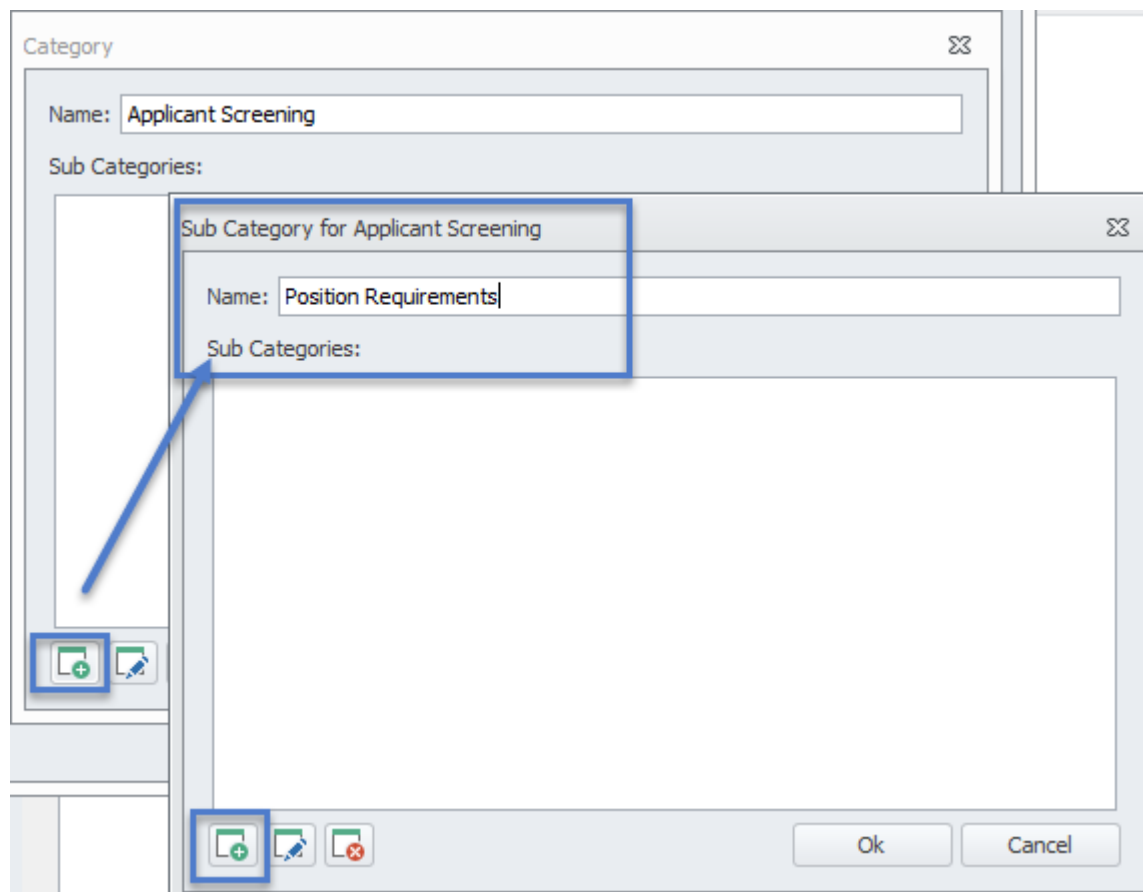
Knowledge Base Permissions

Permissions for a Knowledge Base are set initially against the **Groups**.

Click on Group Permissions on the Knowledge Base set up screen and update the permissions.

Visibility allows the group's users to see the Knowledge Base and **Read Only** prevents users from adding any articles, questions or comments of their own.
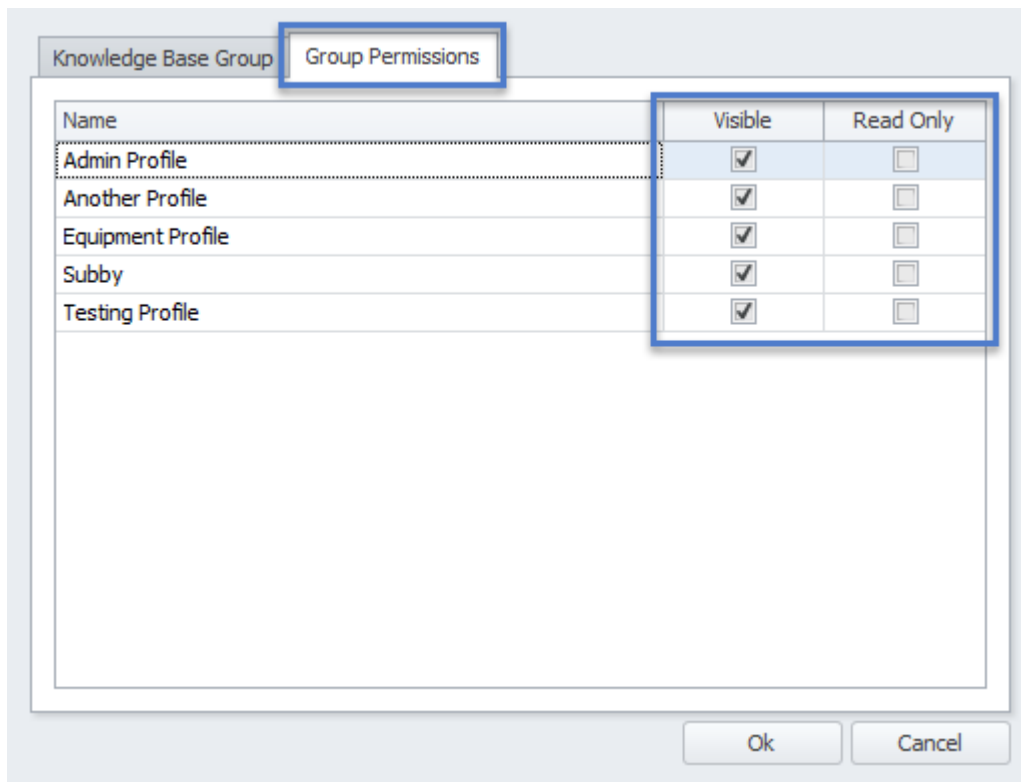
Once the Knowledge Base itself has permissions set up then further permissions can be set at the Profile level. This can result in a single user with their own visibility and access to a Knowledge Base that is different from others.

Go into the Profiles Menu
Open a Profile
Click on the Knowledge Base Tab to set the permissions

Visibility - allows the group's users to see the Knowledge Base
Read Only - prevents users from adding any articles, questions or comments of their own.
Editable – allows those users allocated to the profile to edit another users article within that Knowledge Base.
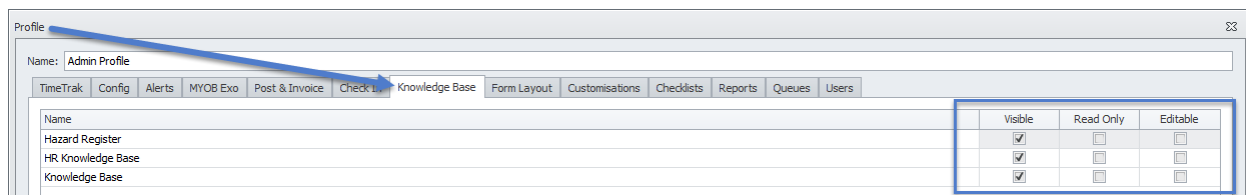
The Knowledge Base is now set up and ready for use.

TimeTrak Professional Knowledge Base

Articles and Questions are created in TimeTrak Professional within a Knowledge Base.

Log into TimeTrak Professional.

Just underneath the report selection option, a list of existing Knowledge Bases will show.
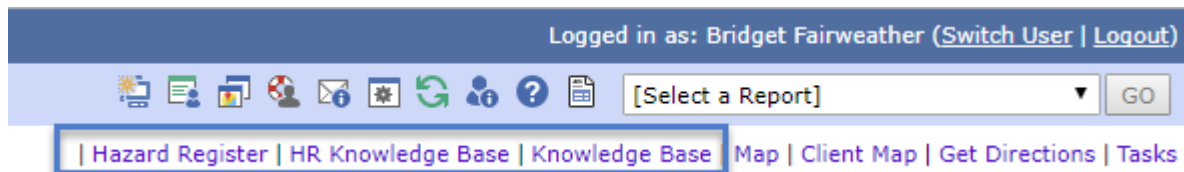
Click on a Knowledge Base link to open the Knowledge Base panel.

Filters and the Categories will show in a panel on the right side of the Knowledge Base.
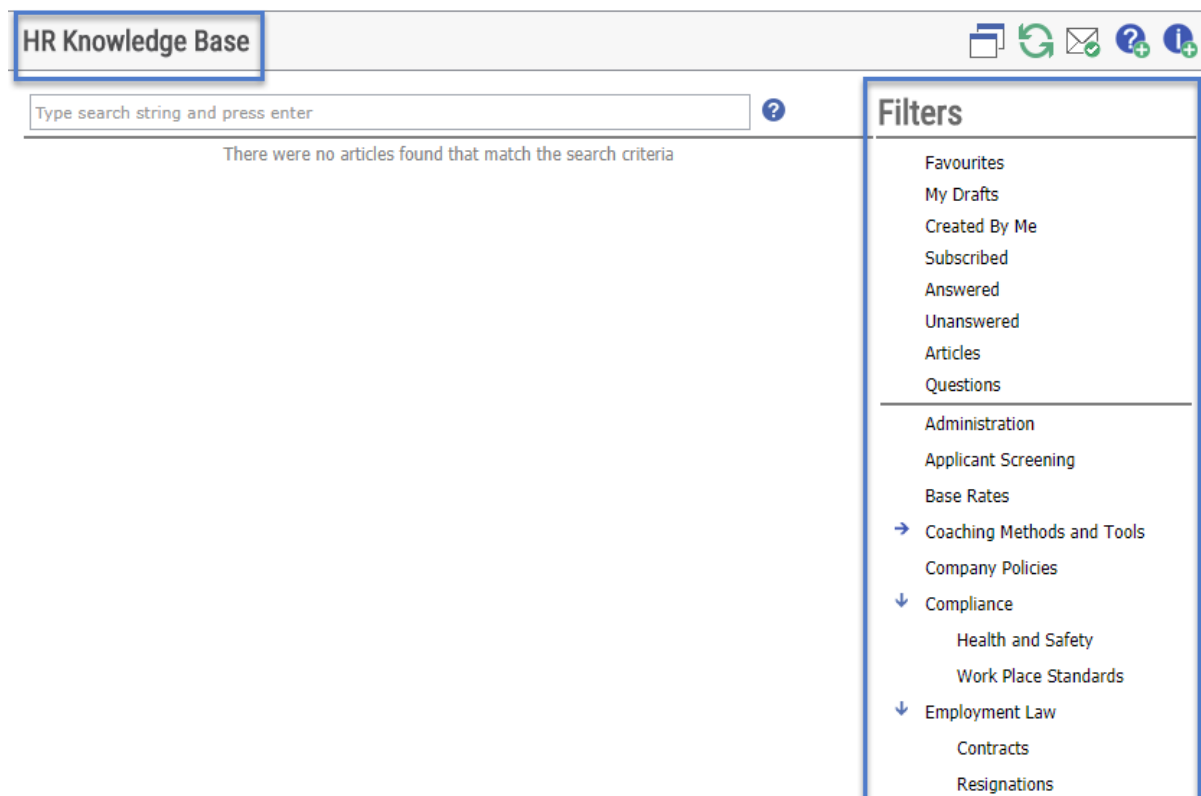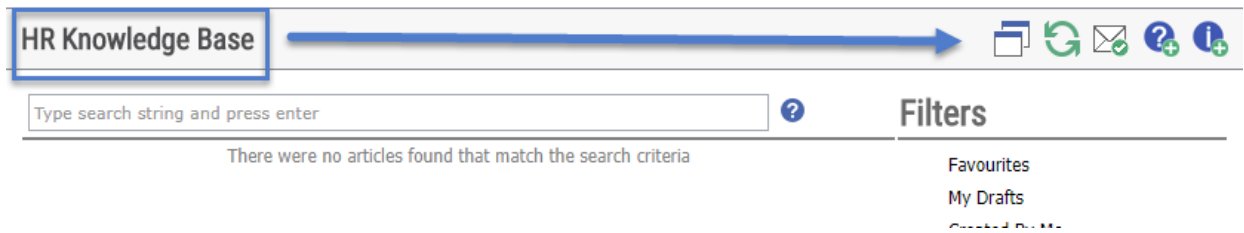
Icons:

  Allows the Knowledge Base to be opened in a new window.

  Refresh

  Subscriptions

  Ask a Question

  Create an Article

Ask a Question

Click on the Ask Question Icon
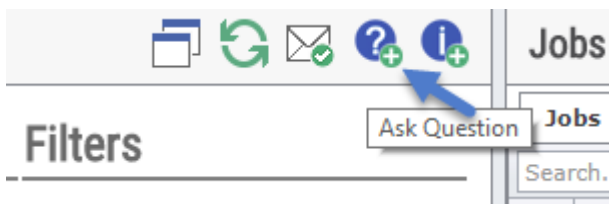
The New Question screen will pop up.

The Details tab is the landing page.

In this screen, the Question will need a meaningful Question Title.

Select at least one Category to assign the Question to.

To do this, click on the Categories Field and a drop down list will appear.

Repeat this to add more than one Category.

To assign under a Sub Category, these are displayed as "[Category] > [Sub Category]".

Enter in the Description of the Question.

There is some basic formatting tools for the content of the Question.

Allow Comments will be ticked on by default, this will allow others to post comments against this Question.

Save as Draft will save the question but it will not be visible to others, it can be edited as needed and then unticked to make it visible to others.

Add this article to my favourites list is also ticked on by default as it makes searching for your own posts much quicker.

Click **Save** to save the Question to the Knowledge Base.

The Question can be found against the Categories that were set against it.

HR Knowledge Base

Type search string and press enter

How many days notice to give?
0 Solutions
Posted by Bridget Fairweather

0
votes

Company Policies **Resigning**

Last updated on Thursday, 07 December 2017 14:15

Filters

Favourites
My Drafts
Created By Me
Subscribed
Answered
Unanswered
Articles
Questions

Administration
→ Applicant Screening
Base Rates
↓ Coaching Methods and Tools
Self Learning Tools
Company Policies
↓ Compliance
Health and Safety
Work Place Standards
↓ Employment Law
Contracts
Resigning
Job Postings
↓ Orientation
Existing Staff Person
New Staff Person

The Question icon will change colour from blue which indicates the following:

Solution accepted

New Question, no solution

An answer is posted but possible answer not accepted

Testing question icon colours

Training Manuals

0 Olivia Tuesday, 11 September 2018 10:32

What to the question icon colours mean

Leave a Comment

1 Answers

0 Olivia Tuesday, 11 September 2018 10:36

Click on the "possible answer" tick to turn the question icon green

Leave a Comment

Post Answer

Tuesday, 11 September 2018 10:36

Create an Article

Click on the Create Article icon.
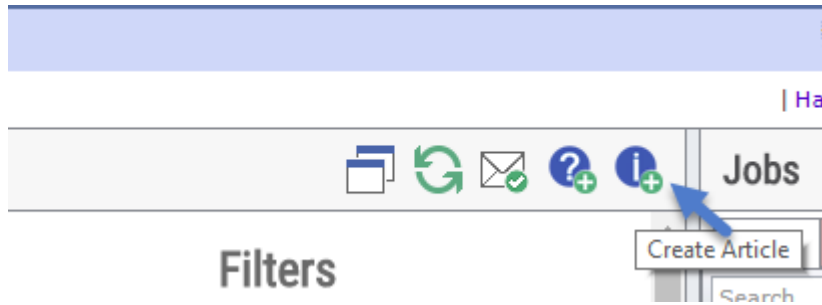
The New Article screen will pop up.

The Details tab is the landing page.

In this screen, the Article will need a meaningful Title.

Select at least one Category to assign the Article to.

To do this click on the Categories Field and a drop down list will appear.

Repeat this to add more than one Category.

To assign under a Sub Category, these are displayed as "[Category] > [Sub Category]", the same principal as "Ask a Question".

Enter in the Description of the Article.

There is some basic formatting tools for the content of the article.

Subject:

Invercargill Fire Emergency Procedure

Categories:

Health and Safety ⊗ Complicance ⊗

Description:

| Normal ▾ | Arial ▾ | (Font Size) ▾ | ⋮≡ ⋮≡ | ≡ ≡ ≡ ≡ | B *I* U | 🔗 🖼 ▶ | A ▾ 🖊 ▾ | ⛶ |

1. Stay calm.

2. Check for danger.

3. Assess the fire.

4. If you feel confident that you can put the fire out, use the fire extinguisher provided.

5. One person calls emergency services – the caller then moves to a safe, visible point to await and guide the services to the accident site on arrival.

    Dial 1-1-1 The operator will ask what service you require – ask for FIRE

    You will then be put through to this service you require. Location –176 Spey Street, Invercargill

    Clearly state your name and the nature of the fire (ie what has happened).

    Telephone number is 03 211 0099

6. Another person activates the evacuation alarm. 7. Follow site evacuation procedures. 8. The branch Health & Safety representative notifies management of the emergency. Management will then advise the necessary agencies including Worksafe NZ.

9. No-one is to return to their work area until management gives the "all clear".

☑ Allow Comments   ☐ Save as Draft   ☑ Add this article to my favourites list

[Save] [Cancel]

Allow Comments will be ticked on by default, this will allow others to post comments against the article.

Save as Draft will save the article but it will not be visible to others, it can be edited as needed and then unticked to make it visible to others.

Add this article to my favourites list is also ticked on by default as it makes searching for your own posts much quicker.

Click **Save** to save the Article to the Knowledge Base.

The Article can be found against the Categories that were set against it.

HR Knowledge Base

Type search string and press enter ❓

Invercargill Fire Emergency Procedure
0 Comments
Posted by Bridget Fairweather
0 votes
Compliance   Compliance > Health and Safety

Last updated on Monday, 30 July 2018 16:30

Filters

Favourites
My Drafts
Created By Me
Subscribed
Answered
Unanswered
Articles
Questions

Administration
Applicant Screening
Base Rates
↓ Coaching Methods and Tools
  Self Learning Tools
Company Policies
↓ Compliance ✖
  Health and Safety
  Work Place Standards

Add An Attachment to an Article or Question

On the attachments tab of an article or question there is the option to browse for the file you wish to attach via the browse button, files can also be dragged here to be attached as per below:

Note: multiple files can be dragged and attached at once.

You can also attach files via the Add Attachment icon.
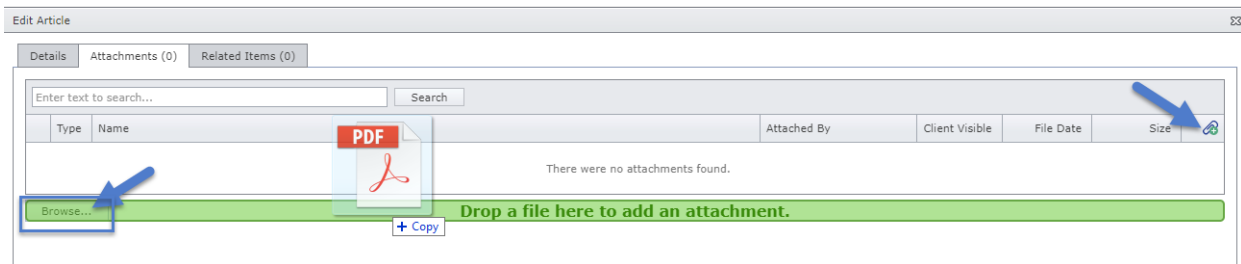
The default settings against the attachment are specified in your TimeTrak Setup.

Link to MYOB Exo Documents will be ticked on or off by default based on what is set in your global system setup within the Admin Console as shown below:

Client Portal Visible will be ticked on by default, based on what is set in your global system setup below:

Category This is the category the attachment will be available against, these categories are again stipulated in the TimeTrak global setup.

Edit an Attachment against a Knowledge Base Item

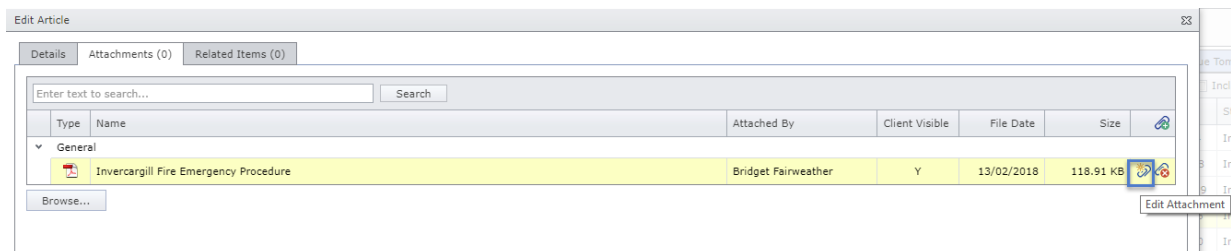The ability to edit an attachment is based on the user's TimeTrak Profile settings

1. Edit Attachment must be enabled as per below:
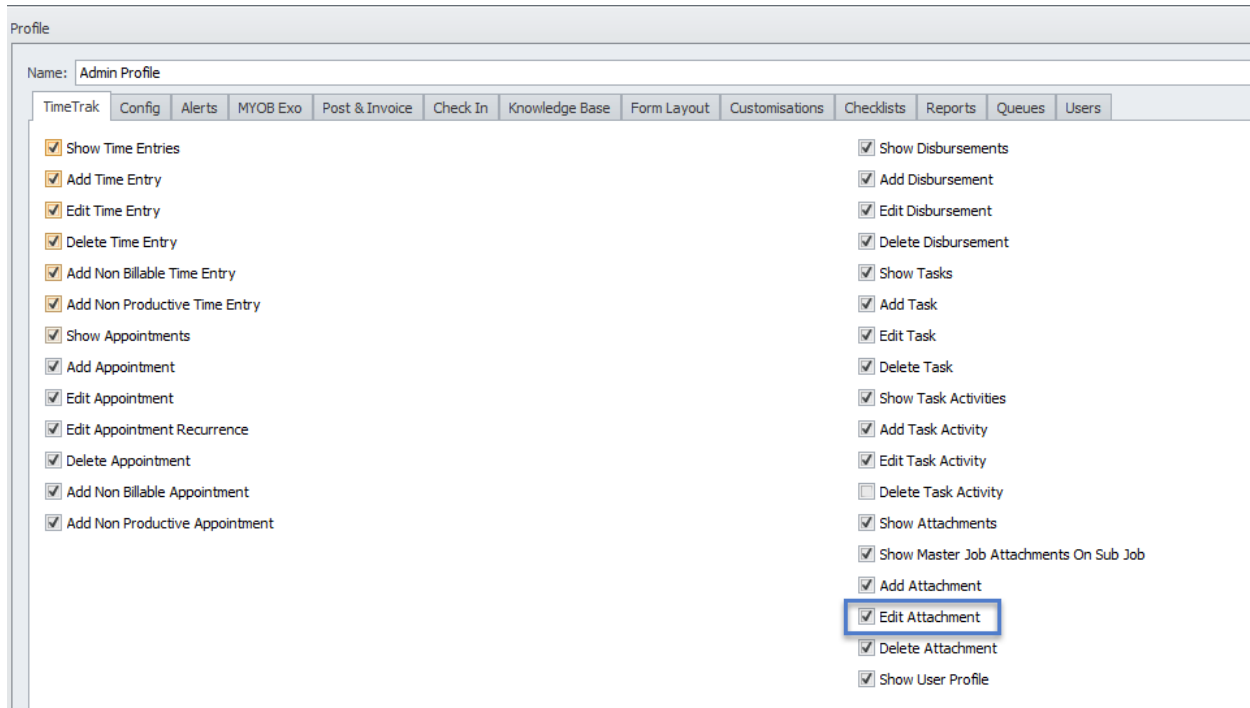
2. The knowledgebase must be visible against their profile not "read only"

Click Edit against the Article/ Question

Then Click on the Edit Attachment icon against the attachment you wish to edit

This will open the attachment screen where you can edit the details of the attachment and save, or delete the attachment by clicking the icon.

Attachment   ⊠

| Details |

Name: *   Invercargill Fire Emergency Procedure

File: Invercargill Fire Emergency Procedure.pdf

Description: Invercargill Fire Emergency Procedure

Category: General   ▼

          ✓ Link To MYOB Exo Documents   ✓ Client Portal Visible

🗑   Save   Cancel

Edit a Knowledge Base Article or Question

If permissions allow, users can click the "Edit" icon to edit the article/ question

Delete a Knowledge Base Article or Question

Click the edit icon against the article/ question

The Edit article/ question screen will apear.

Click the delete icon in the bottom left hand corner.

Relate an Article or Question

An article or question can be related against an **Article, Client, Contact, Job, Task, Serviceable Unit** or **Stock Item**

When you relate an Article or question to any of these options the article can then be accessed via these.

E.g. Stock – In Mobile (only) you can search stock and it will have a link to the article.

Relating an article or question can be done against the related items tab, click the "Relate" icon and select which option you would like to relate your article/ question to

In this case the article is getting assigned to a job.

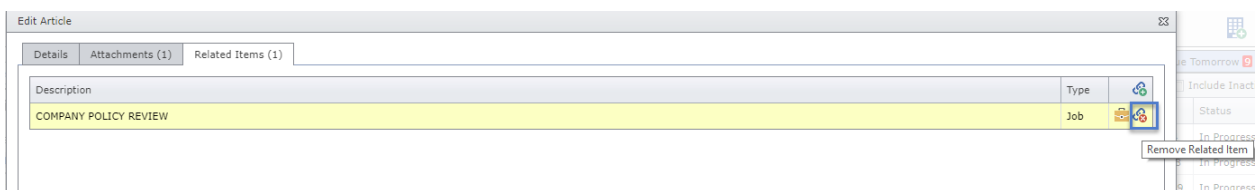You can search/ select by client to limit the jobs or enter the job number directly.
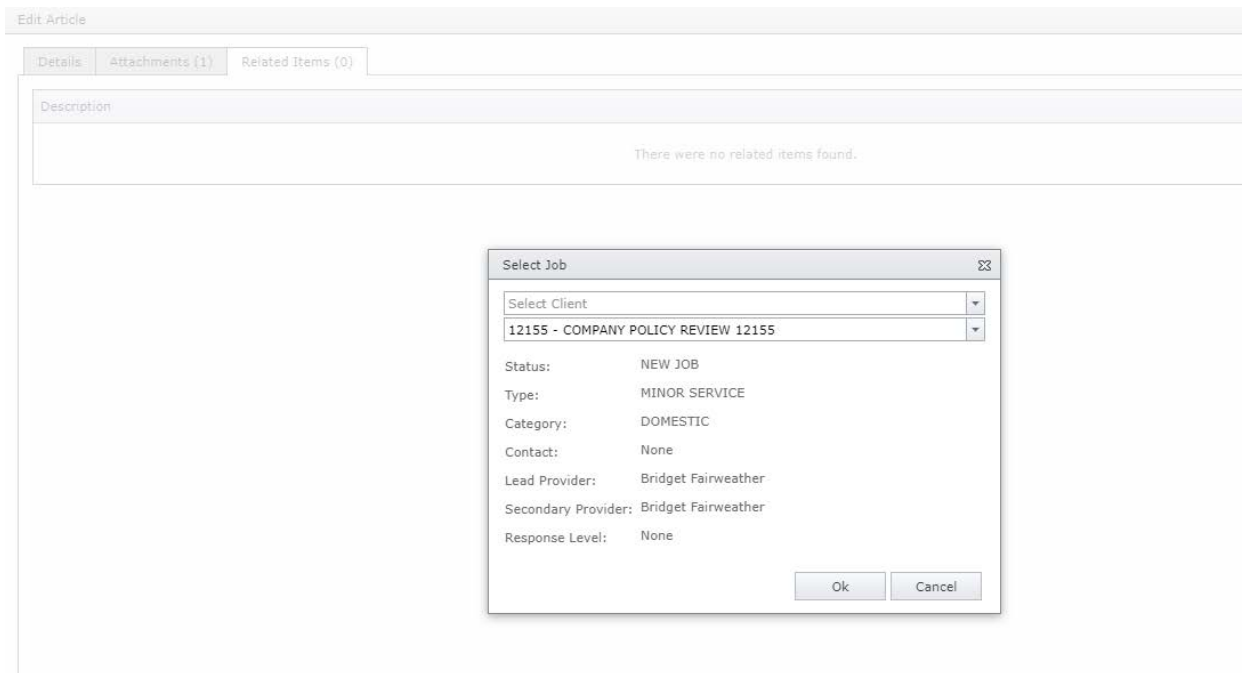
Now from the related items tab users can click the job icon to view the job the article/ question is related to.
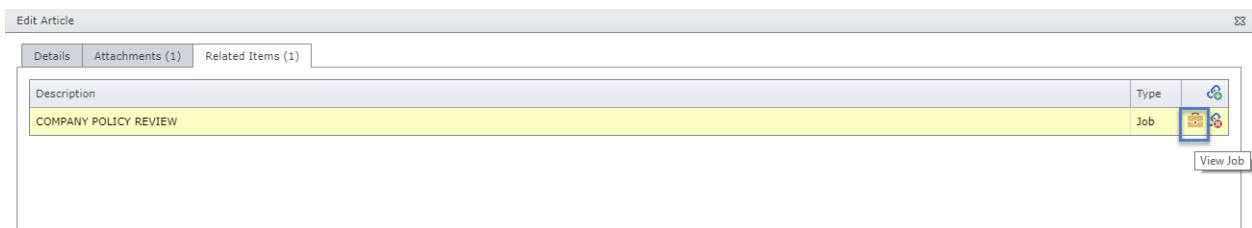
To remove the relation click the "Remove Related Item" Icon.

From the Knowledge Base home screen the job icon is visible to show users the article/ question is related to a job.

Hovering over the icon displays the job name.

Against the job, users can see there is an article related to the job via the articles tab.

Selecting the item will open it on screen for users to view.

Users can also remove the relationship between the article/ question from this here or add an additional realationship to another article/ question.

Share an Article or Question Link

Users may want to share an article they have created or think will be useful with a co-worker.

This can be done by clicking on the "Share" icon against the article or question, this will pop an Article Link box which users can then copy and send to a co-worker.

As long as they have a login to TimeTrak which has access to the Knowledge Base they will be able to go to the link.

Article Link:
http://localhost/dev/timetrak?articleid=3011

Complicance Health and Safety

0   **Bridget Fairweather**   Tuesday, 13 February 2018 11:49

1. Stay calm.

2. Check for danger.

3. Assess the fire.

4. If you feel confident that you can put the fire out, use the fire extinguisher provided.

5. One person calls emergency services – the caller then moves to a safe, visible point to await and guide the services to the accident site on arrival.

    Dial 1-1-1 The operator will ask what service you require – ask for FIRE

    You will then be put through to this service you require. Location –176 Spey Street, Invercargill

    Clearly state your name and the nature of the fire (ie what has happened).

    Telephone number is 03 211 0099

6. Another person activates the evacuation alarm. 7. Follow site evacuation procedures. 8. The branch Health & Safety representative notifies management of the emergency. Management will then advise the necessary agencies including Worksafe NZ.

9. No-one is to return to their work area until management gives the "all clear".

  Invercargill Fire Emergency Procedure.pdf (118.91 KB)

                                                Leave a Comment

Related Items
Job: COMPANY POLICY REVIEW

Subscriptions

TimeTrak users can subscribe against a Knowledge Base to receive TimeTrak notifications and/or email notifications when new questions and/or articles are posted against the Knowledge Bases categories.

This can be done against the Knowledge Base by clicking the Subscriptions icon as below:

HR Knowledge Base

Type search string and press enter

Invercargill Fire Emergency Procedure
0 Comments
Posted by Bridget Fairweather
0 votes
Complicance Health and Safety
Last updated on Tuesday, 13 February 2018 13:36

How many days notice to give?
0 Solutions
Posted by Bridget Fairweather
0 votes
Company Policies Resigning
Last updated on Tuesday, 13 February 2018 13:35

Filters
Favourites
My Drafts
Created By Me
Subscribed
Answered
Unanswered
Articles
Questions
Administration
Applicant Screening

This will open the Subscriptions screen where users can specify which categories they would like to get notifications against as well as what type of notification they would like to receive.

All categories can be updated at once instead of individually by right clicking on the grid.

There is also the option to automatically subscribe to any new categories added to a Knowledge Base.

Filters and the Categories will show in a panel on the right-hand side of the Knowledge Base

Applying a Filter

Click on Category or Sub Category to apply a filter. This will display all articles or questions that have that Category or Sub Category assigned against them.

A filter is shown as applied when highlighted in blue and will remain highlighted when the mouse is navigated away from hovering over the selected filter. Only one filter can be applied at any one time. To remove the filter click on the "X".
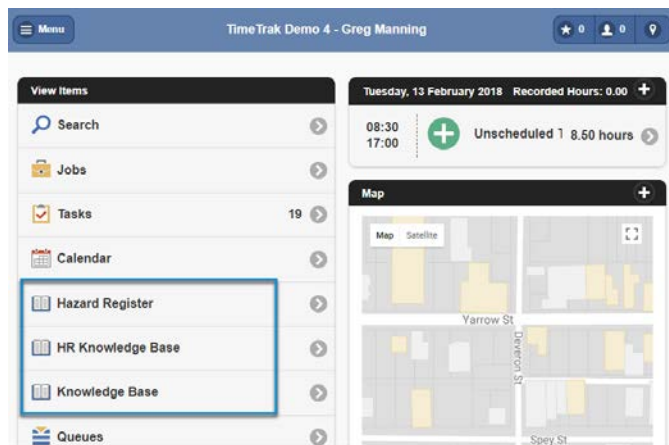
TimeTrak Mobile Knowledge Base

Articles and Questions created in TimeTrak Professional are also available in the field within TimeTrak Mobile.

Log into TimeTrak Mobile.

Under Profile, there is a Knowledge Base option, if this is enabled all Knowledge Bases visible against the user's profile will be available from the home screen.
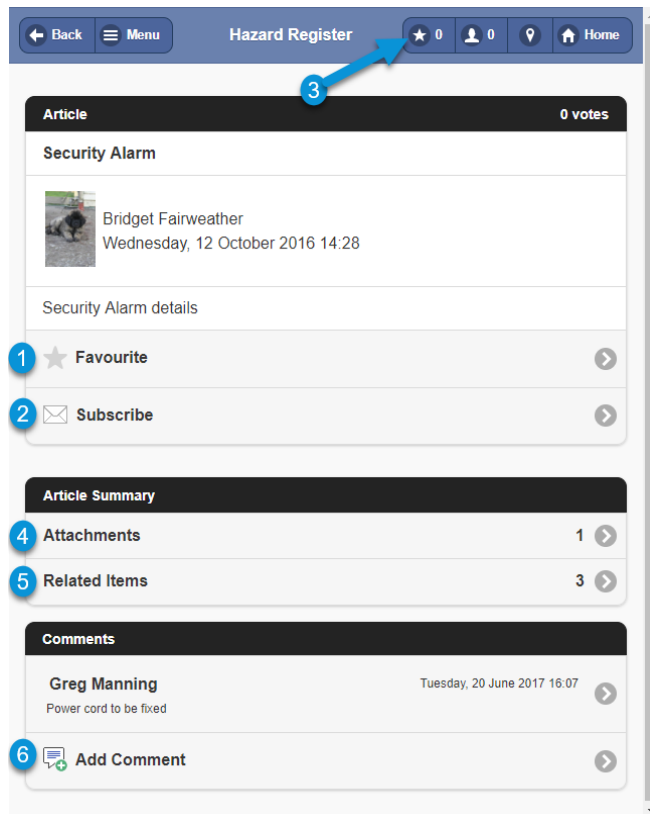

Click on a Knowledge Base link to open the Knowledge Base panel.

Filter for articles based on type and/or category.
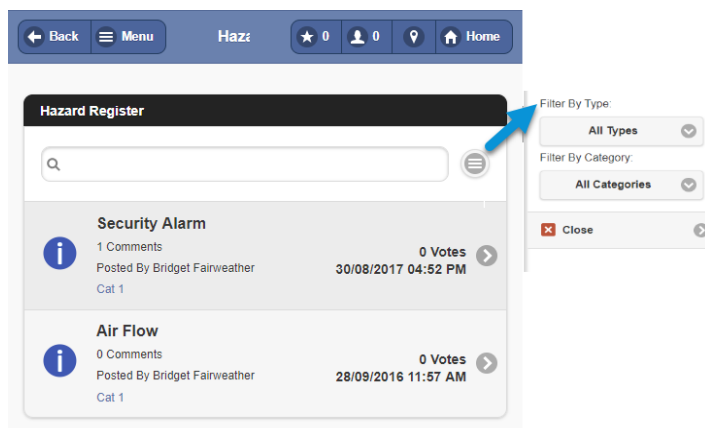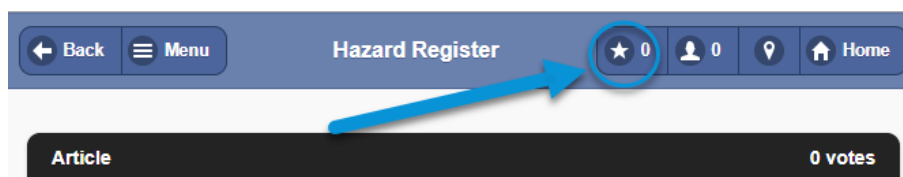
Features within an Article/Question

1. **Favourite** - Click to add the article/question as a favourite, the star will show as yellow when selected, it will also automatically set this as a subscription to the article/question. By clicking this again, it will remove the yellow star which removes it from your favourites. A list of favourites is only visible in Professional.
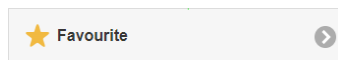
2. **Subscribe -** By clicking subscribe, the envelope will show a green tick on it when selected. By clicking this again will remove the green tick and unsubscribe to the article or question.
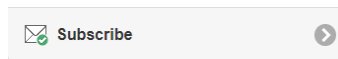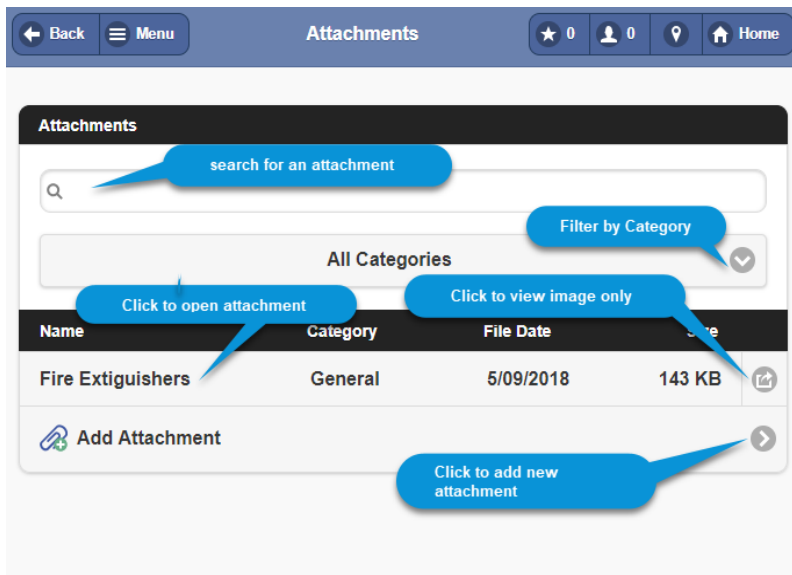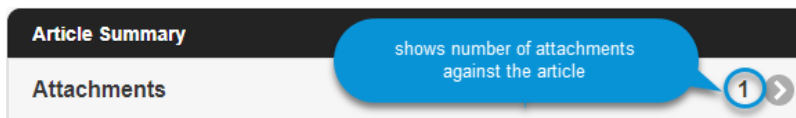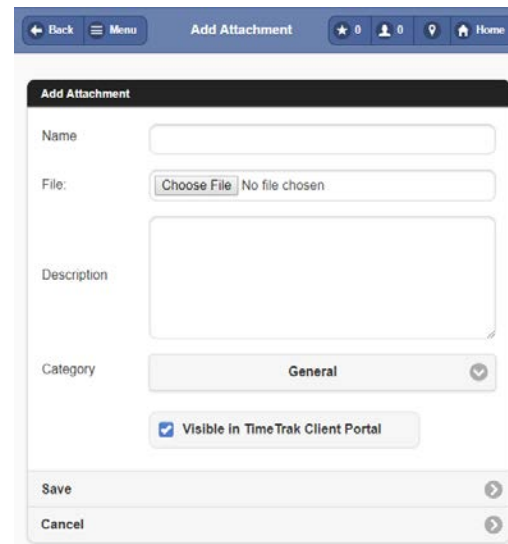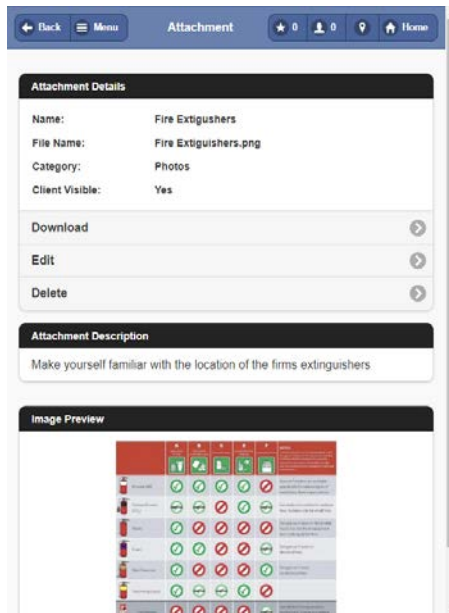

3. **Notifications -** If an article has been subscribed to, any updates to that article or question will show in notifications (star) on the header bar.

Back Menu Notifications ★ 0 👤 0 📍 🏠 Home

Notifications

💬 A new comment has been posted by Bridget Fairweather for the article in Hazard Register titled "TEST … 30 minutes ago
Wednesday, 5 September 2018 at 10:33 AM by Bridget Fairweather.

4. **Attachments**

Article Summary

shows number of attachments against the article

Attachments 1 ❯

Back Menu Attachments ★ 0 👤 0 📍 🏠 Home

Attachments

🔍 search for an attachment

Filter by Category

All Categories ⌄

Click to open attachment Click to view image only

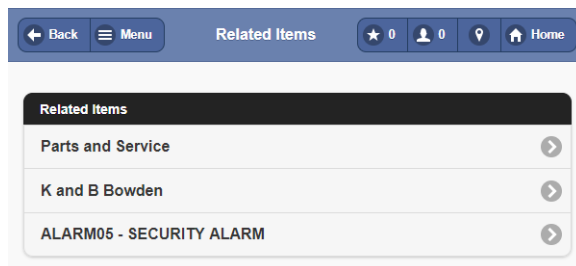| Name	Category	File Date	Size
Fire Extiguishers	General	5/09/2018	143 KB

📎 Add Attachment ❯

Click to add new attachment

5. **Related Items** – users are easily directed to related items if they have been linked in the Knowledge Base set in Professional.

6. **Add Comment** – users can leave a comment.