TH207CS – Wikis for the Workplace

In this creation station you will:

- Build dynamic learning content into a wiki
- Create an open discussion forum for collaboration
- Setup an alert for notification
- Turn a question into dynamic shareable content; tacit knowledge capture

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Introduction

Wiki is the Hawaiian term for *rapid*. So let's look at how this term can translate into being relevant for your company. We all have a growing need for real-time information to rapidly foster:

- Informal learning,
- The creation of shareable knowledge and ideas,
- Repeatable business processes and
- Faster problem solving skills

for our audience; employees, sales, constituents, partners, etc.

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Wiki Basics

- A basic understanding of Word is assumed for this session.
- Wikis are web-based environments, they function like a web-page of content, and therefore, as you build a wiki page, we will refer to that as a page of content or an article.
- Pages of a wiki are constructed under a structure referred to as a category. Think of a category as "Topical Areas of Interest" for your organization and user base.

Getting Started With Your Learning Wiki

Login

To get started we need to login to your wiki trial site:

Step	Action
1	Open Internet Explorer and type http://www.customervision.net/astd# (with # being the number at your workstation).
2	Enter the Userid and Password provided by instructor

The visual you are seeing can easily be tailored by you, a non-IT person utilizing the administrative side of the CustomerVision BizWiki application. This means that the design, layout, colors, logo, etc. are all able to blend with your existing sites, company branding, etc. as required by you.

Building Learning Content in Your Wiki

Wiki tools allow for one-click editing, page creation, collaborative discussion, page history revision logs, recent change views and the ability to access the administrative side of the system, with proper access permissions. For further information on maintaining wiki access options, click here. The following describe the function of each wiki tool:

- **(1) Edit** – the ability to access the edit function for an article with one click. The editing functions available include editing the content of the article, adding content and changing the category of the article. Additional editorial functions will still need to be performed on the administrative side.
- **(2) Discuss** – the ability to add comments to an article in a 'threaded discussion' format. After discussion comments are added, you can view a page that displays all the discussion comments and allows you to reply to others comments. A 'Delete' option may also be displayed if your userid has the administrative function permission. This discuss tool is different from the "Comments" tool located in the Article Tools as the discuss tool is intended as a tool for collaboration among work groups and users knowledgeable about the article content while the comments tool is intended as a tool for anyone reviewing the page to add a rating and overall general comments about the page.
- **(3) Page History** – the ability to access all the previous versions of the article that have been created. This tool also allows you to revert back to an older version of the article if needed. The date of the change, who made the change and the comment describing the change are provided on the Page History page.
- **(4) New Page** – the ability to create a new article. The name of the article, category, article content and any applicable keywords are available on the New Page tool.
- **(5) Recent Changes** – the ability to see all web pages that have been modified, sorted by how recently they have been edited. The screen will display a search results list, similar to hitting the search button with all categories selected assuming the sort order is by date.
- **(6) Admin** – the ability to link to the internal side of the product. Permissions for each user will be read once a user logs in and if they have any administrative permission the admin tool will be available. This allows for quick access to the administrative side from the user side.

New Page

Step	Action
1	**Click** on "**New Page**" from the Wiki Tools, right hand side of page
2	**Select** a **Category** from the drop-down**:** Each page must be assigned a category to maintain organization within the wiki.
3	**Enter** the **title** of your page
4	**Enter** the **content** for your article. Formatting this information is easy using the WYSIWYG editor provided. The WYSIWYG editor is graphical and requires no knowledge of HTML. Inserting and uploading documents, adding sound files, inserting templates and anchor tags, creating forms, adding

	bullets, adjusting indents, adding graphics and text links are all accomplished with the WYSIWYG editor. Rich HTML content from other editors can easily be added by simply cutting and pasting into the WYSIWYG editor. For more information on using the editor, click here.
5	**Summary:** (Optional field) Enter a brief description of the article. This description will appear on any search results page, underneath the title of your article. Formatting this information is easy using the WYSIWYG editor provided. The WYSIWYG editor is graphical and requires no knowledge of HTML. Inserting and uploading documents, adding sound files, adjusting the text size or style, adding bullets, adjusting indents, adding graphics and text links are all accomplished with the WYSIWYG editor. Rich content from other documents or HTML pages can easily be added by simply cutting and pasting into the WYSIWYG editor.
6	**Keywords:** (Optional Field) Enter words related to the article that are not contained within the title, summary or content sections but may be entered by someone performing a search for this information. For example, if your article refers to "Customer Relationship Management" throughout the article, add 'CRM' as a keyword. Someone searching may just enter this acronym instead of the entire phrase.
7	**Click** the **Save** button

Recent Changes

Step	Action
1	**Click** on “**Recent Changes**” from the Wiki Tools, right hand side of page
2	**Click** your article/page Title**:** Each article will appear that is in the database, most recently updated appear at the top.

Edit Your Page

Step	Action
1	**Click** on “**Edit**” from the Wiki Tools, right hand side of page
2	You can modify your content, summary, title, category from here, as desired.
3	**Click** the **Save** button

Methods of communication and collaboration from the wiki

Discuss

Step	Action
1	**Click** on “**Discuss**” from the Wiki Tools, right hand side of page
2	You can add threaded discussion regarding this information (page of content), as desired. **Must enter** a **Title and Comments** if creating a new thread.
3	**Click** the **Post this Comment** button
4	**Click Home**

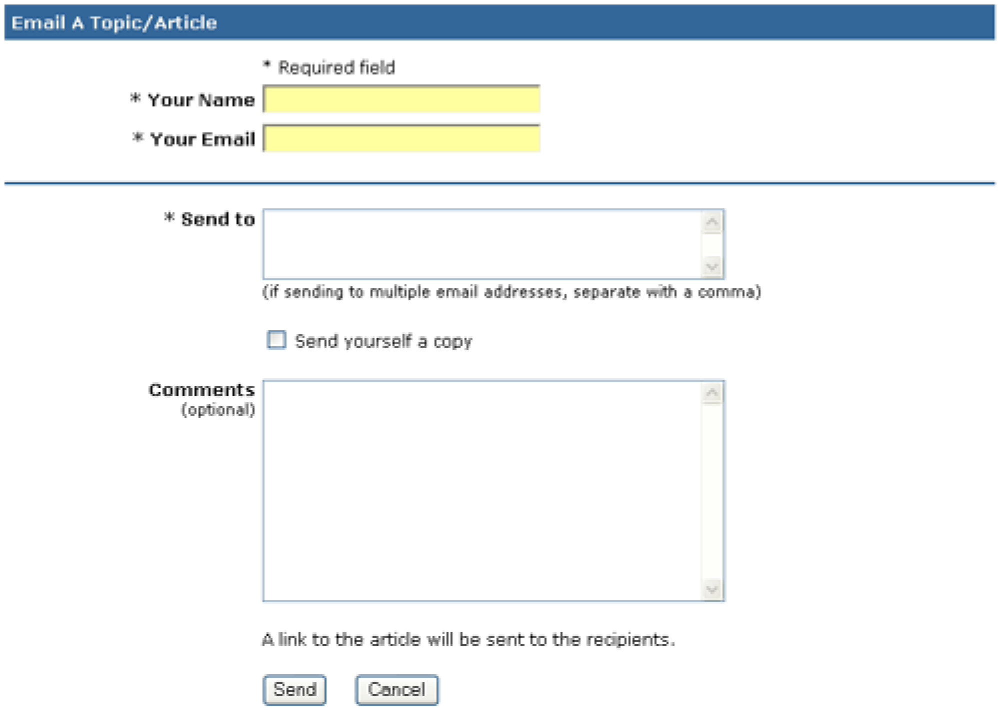
You or the administrator can edit, reply or delete your comments. Others can view your comments and reply to them or create a new thread.

Article Tools: The article tools, if enabled, are usually located at either the top right or bottom of the screen. These tools allow you to perform the following actions off the page:

Comments: This tool provides for feedback on the page that will be reviewed by an admin expert. Users will be able to add comments and a rating to any page they view. If you click on "comments" and you will be directed to a page that allows you to enter comments and choose from the following ratings: Excellent, Good, Incomplete, Outdated and Wrong.

Print: This function will display the content portion of the page on a separate screen, in a simple format without the web related elements. You can then select the print function from your web browser.

Email: This allows you to send an email to others containing a link to this page. When the recipient(s) receives the email and clicks on the link, they will be automatically taken to the Web page that displays this content:



To email the information:

- Click the link *Email*.
- A page will display requesting the following information:
  - Your email address
  - Your name
  - The email addresses of individuals to whom you want to send this information
  - Comments about what you're sending. Note: We recommend that you include some comment if possible to help inform the individuals to whom you're sending the e-mail what they're receiving.

<u>Alerts</u>: The Alerts allow users to easily monitor individual pages or categories for changes. When you set an alert at the page level, changes to the page from discussion updates or content changes will trigger periodic e-mail notifications to you. When you set an alert at the category level, you will receive only one email notification per day, summarizing the changes for the day.

Step	**Action**
1	**Click** on the link ***Alerts*** found in the page toolbar, located on either the bottom or right hand side of the page. The screen will refresh and you will see a message at the top saying *You will be notified if this item is updated*.

A ***category*** alert can be set in one of two ways:

- To set a category alert from the My Place page on the user side:
  - Click on Login or My Place from the Article Toolbox Area.
  - Click on the link *My Alerts.*
  - Click the *Modify Category Alerts* button at the bottom of the page.
  - A screen will pop up listing all the categories. Select the category (ies) you want. NOTE: Selecting a category will automatically select any subcategories below that category.
  - Click the **Save Changes** button. The category (and its subcategories) have now been marked and you will receive alerts when their information changes.

RSS: Real Simple Syndication, or RSS, functionality provides a convenient way for a user to add a CustomerVision feed to their RSS reader. ***NOTE:*** This tool is an option on the article tools and may or may not be visible to you.

- Click on the RSS graphic.
- A screen will pop up listing all the category selections. Each category will have an XML graphic for you to choose.
- Choose the category (or categories) to add to your news feed.
- An HTML screen will pop up.
- Copy the address of the URL in your reader and follow any further directions of your RSS reader for completion.

Login / User's Place: You will see one of two tools here:

- **Login:** This will display if you are not currently logged into the system. You can then click on this link to login to the system. If you are a new user of our system, you will be sent to the Registration page. Your email address and a password are required, with other profile information available if you choose.
- **User's Place:** If you are logged in to the system, this will display with your userid name (Ex: John's Place). This tool takes you to the My Place page where you can update your profile within the system and keep track of previously asked questions and alerts that you've created
- **Click Home** to return to the main window**.**

Turn a question into dynamic shareable content

Ask a Question: If you are unable to find the information you need after searching the wiki knowledge base, this function enables you to create and submit a question directly to our support staff for a response. In order to use this page, you must have a valid email address. Be sure you enter your address correctly, as it is the only way we have of communicating with you about this question.

An example of an *Ask A Question* page: (the page format you see on your site may be different as this page is customizable by client)

Step	Action
1	**Click** on "**Question**" from the Article Tools, right hand side of page
2	**Enter** your **email address, first and last name** if not already completed, or if you would like to change.
3	**Select** a **category** to assign to your question to insure it is routed in the fastest possible manner to the appropriate subject matter expert
4	**Enter** the **question** you have **in the box**
5	**Click** the ***Submit Question*** button to send your question to a subject matter expert, who will reply via e-mail to the address you entered
6	**Click Home** on the left side of your window to return to the front page of your site

Log in to Administrative Side of the BizWiki Application as the Expert to answer the question which was just submitted.

Step	Action
1	**Click Admin** on the Wiki Tools on the right side of your window
Or: 1	Open Internet Explorer and type http://www.customervision.net/astd#/expert (with # being the number at your workstation).
2	Enter the Userid and Password provided by instructor

Message Tab

Step	Action
1	**Select** the **Messages tab** on the top of the window, 2nd tab from the left.
2	**Select** your **question by clicking on it** or if you do not see your question from Select a List, in the middle of the window, select All Assigned Open Messages and hit Display. Select your message (you may need to assign it to you first as well).

Message # and Status: The internal message number and current status of the message.

- **Message**: An automatically generated number by the system to make each message chain unique.
- **Open status**: Message is active and awaiting a response/action.
- **Closed status**: Message has been responded to and/or action taken to resolve the message.

User Information: The following information about the submitter is displayed:

- Email address
- Name
- Company
- Phone Number

Category: The category assigned to the message.

Question: The create date of the message, elapsed time since the create date and the actual message are listed in this section.

Insert additional question from customer: Click here if you need to add another question from the customer that pertains directly to the original question.

Response: The create date of the response and the actual response are displayed.

- A *Search Content Bank* link is provided in order to find a response that may already be in the content bank.

Step	Action
1	**Response Box** needs to be **completed**, so answer your question.
2	**Send Response** radio button should be **highlighted**
3	**Close Message** radio button should be **highlighted**
4	**Click Save Changes** to update your information

Send Response / Don't Send Response: The system default for this radio button is controlled at the system level under System Options.

- **Send Response:** Initiates an email response to the submitter.
- **Don't Send Response:** An email response will not be sent to the submitter, regardless of the final status assigned.

Assigned To: The expert assigned to the message will be displayed. To reassign the message, select a different expert from the dropdown box.

Notes: This section allows you to enter information as you work to resolve this message. This information is internal only as it will not be included in the response that is sent to the submitter.

Close Message / Leave Message Open: The system will default to the *Close Message* radio button. If you are not yet ready to close the message, click on the *Leave Message Open* radio button.

- **Leave Message Open** will automatically route the message to the Message Queue.
- **Close Message** will automatically route you to the Promoting Messages to the Content bank page where you can choose to promote the message to the content bank. If you choose not to promote it, it will be automatically routed to the Message Queue with a status of *closed*.

. Click **Cancel** to abandon your updates and return to the Message Queue page.

Promote Content

Step	Action
1	**Click Promote button**

This action moves your one-to-one communication into your wiki knowledge portal for others to share and learn from. This allows you to draw from expert's knowledge as they answer questions or provide valuable information to others and quickly move it into shareable knowledge. This not only reduces the number of questions your SMEs receive but reduces the cost spent in their time answering the same questions over and over again and helps build your companies intellectual knowledge capital as a total organization.

Publish Content

This window functions similar to the wiki editing window, but with more features and functionality.

Step	Action
1	**Change Status to Live and Public** from the current drop-down reflecting Draft
2	**Hit Save**

Return to User Side (Home)

Step	Action
1	**Click Home on the right hand side of your window**, or change your url to www.customervision.net/astd#

Search

Step	Action
1	**Enter a keyword** from the content you just built**,** and **click** the **Search button** on the left side of the Home Page
2	**Click** on **your page.**

Wikis are easy to build and share the expertise that drives organizational performance and efficiency through an easy to use wiki knowledgebase and integrated communication workflow. In minutes, without the need for IT support, you can drive organizational performance and productivity.

Job Aid

The decision table of **when a Business Wiki would be applicable** in helping with your training initiatives.

If	And
Your information changes on a regular basis	It takes too long for the audience to receive the updates
You use email to share quick information	That information is not captured for others to utilize
The ability to “Search” for content is key	I do not have an easy Search mechanism today, or my information is in a file structure that is not easy for everyone to understand
I need a way for experts to answer questions one time	Capture their knowledge to share with others immediately
I need input and collaboration from a community; my team, my colleagues, etc.	I want a medium that is easy for a novice to use, but secure based on my community needs.