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Overview:
The Knowledge Base allows you to store a library of information which can be searched by keywords. You may store articles with instructions for your Customer Service team to solve problems, manuals for your products, etc. These articles can be grouped by category to make it easier for users to locate a topic of interest.

1. To access the Knowledge Base, click the Knowledge icon. By default, the knowledge screen is empty.

2. The controls at the left allow you to:
   a. Use Quick search to search the entire library by keyword
   b. Use saved searches to search for articles using additional search criteria
   c. Add New Articles to the library
   d. View articles you Recently opened
   e. Add articles you often require to your Favorites list
The Article Record:
An example Article record is shown below. Each is automatically numbered when it is created. The Article Number is shown in the upper left corner, along with its Creation Date, the Author’s User Name, and the Date it was last Updated.

The Notes section is a free-form text field and contains the comments from the author. In this example, they describe how to Configure the Document Reader – and refer Users to the attached documents listed for reference. Notice that the attached files may be emailed directly from here if desired by selecting one or more attachments and clicking the Email Attachments button.

Searching for Articles

Quick Search

1. Choose how you want to search for the articles:
2. Type in your keyword or article number, etc and Press enter or clicking on the magnifying glass to initiate the search. (Note that you can use the * as a wildcard. EX docu* or *docu* )

3. Click on the article you want to open to display it.

4. Click any attachments to open them.
Article Groups

1. You can also search for Articles by their assigned groups:

Using Favorites

1. If desired, you can open an Article that you need frequently and click ‘Add to Favorites’ to add it to your personal favorites list:

2. In the future you can then open the article by clicking on it under the favorites.
3. You can also remove an article from favorites by hovering over the name and clicking on the red minus sign.

Adding New Articles

1. In the Knowledge tool, click New, then Article.

Enter an appropriate Description for the article. Place the text of the article in the notes section of window, or record it separately and use the Attachments tab features to link it to the window.

Make the search for a knowledge article more accurate by identifying Knowledge Base Keywords. You will be able to search on these words to find a Knowledge Base article.
Search for **Group** to associate the article with. The groups are listed in the **Articles** portion of the **Knowledge** window side toolbar.
Maintaining Articles

Only people with given privileges will be able to edit. Clicking the Edit button at the top of any Article, zooms to this window:

Here you can delete and re-upload documents attached to this KB article.

Notes can be used in any way desired. It has been commonly used for a summary of the article or an area to keep a change log of the documents inside of attachments.

Click More... to display additional tabs: Groups and Keywords.
Groups lets you decide which categories the article will appear under (listed in the Articles on the left hand pane).
Keywords

Keywords allows you to add words the user can search on outside of the title. All words in the title are inherently keywords.
Emailing Article Attachments

1. When you have an article open, and want to Email the attachment(s), first select the article(s) from the displayed list. Selected attachments will change to blue.

2. Click the Email Attachments button to launch an Email window which includes you selected attachments: