Knowledge Tracker *User Guide*

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Getting Started

Knowledge Tracker helps libraries route and respond to patron requests, reuse closed requests through staff search tools, and create public FAQ and knowledge base pages.

Getting started is easy with Compendium's customization service, included at no extra cost. Send requests to support@compendiumlib.com or your Compendium contact.

Our library has an old web form we'd like to use with Knowledge Tracker:

Just send us a link to your webform(s). We'll create a temporary copy on our server which works with your Knowledge Tracker account. Once you've had a chance to test the form, we'll help you update your live version.

We've never used web forms, but we would like to.

We can set up web forms for you. Web forms are usually hosted on the library's server, but we can also host them for you.

Let us know what information the form(s) should collect and who should get the requests, and we'll do the rest.

We want to take patron requests by email / in person / through Desk Tracker.

Knowledge Tracker works with each of these methods. Let us know how you'd prefer to take electronic requests, and we'll set the system up accordingly.

Note: To make a library email account "talk" with Knowledge Tracker, you'll need a little IT help from whoever manages your email. We can work with your IT department for a smooth transition.

We need to set up staff accounts.

Send us a list of names and emails, and we'll create your accounts. Specify what types of tickets each user should be able to view: all tickets, those assigned to their group or department, or only their own.

Thanks, but I'd like to set everything up myself.

The following pages list steps for customizing and using Knowledge Tracker. As always, if you get stuck or have questions, just let us know.

More About Tickets

The term *"ticket"* is used in Knowledge Tracker to describe an interaction between library staff and a patron. Tickets are typically initiated by patrons and include questions and reference requests submitted via library web forms and/or email. Each ticket includes a transcript, which accumulates a conversation between staff and the patron over the life of the ticket. Once resolved, tickets can be used be used as a starting point for publishing publicly-available answers in FAQ or Knowledge Base format.

Knowledge Tracker provides a great deal of control over how tickets look and behave. In addition, it is possible to automatically assign incoming tickets to specific staff members, and to send email notifications to others when certain conditions are met.

This document describes how Knowledge Tracker works through its staff, patron, and public views.

Most Knowledge Tracker tickets begin when a patron submits a request or question through a library web form or by sending an email to a designated library address.

Tickets can also be created manually or, for libraries using both Knowledge Tracker and the Desk Tracker public service statistics system, by *escalating* a Desk Tracker event.

Remember, Compendium provides setup, customization, and support at no cost.

Web Forms

Knowledge Tracker can accept requests from any Internet web form, and several tools are available to help a library web administrator direct patron web requests into Knowledge Tracker. For details, see the section labeled *Integrating Knowledge Tracker with The Library Website.*

The new ticket will be linked to a patron account based on the email address provided in the web form. If no matching patron account exists, a new account will be created.

Email

Knowledge Tracker uses automatically generated email messages for notifications and communication between staff members and patrons. In addition, the library can optionally accept new requests via email. If the *Accept Email Requests* system option is turned on (see *System Options*), all emails received by Knowledge Tracker, that are not replies related to existing tickets, will be entered as new tickets. Patrons who submit an email request will receive an automatic response with a customizable message. The response will include instructions on signing into Knowledge Tracker to view their open tickets and post responses.

A patron account will be linked with the new ticket based on the *from* address of the email message. If no matching patron account exists, a new account will be created.

Accepting new email requests allows patrons a convenient method of initiating contact with the library, but it also creates the potential for new tickets created by "spam" email to the library's system email address. The Accept Email Requests system option is turned off by default, and can be activated by setting the system option Accept Email Requests to "yes."

Patrons and staff can also reply directly to all Knowledge Tracker system emails (such as ticket updates, notifications, and assignments), so it is possible to carry on a normal email conversation without signing in. All email communications will be recorded in the ticket's transcript.

Every Knowledge Tracker library has a *system email address* in the format account_number@knowledgetrackerlib.com. Messages sent to this address will behave as described above. However, most libraries will want a system email address on their library's domain, such as "reference@yourlibrary.edu."

Using Library Email Addresses with Knowledge Tracker

To accept Knowledge Tracker email requests using one or more local email addresses (for example, reference@yourlibrary.edu), set the local email accounts to forward messages to the library's Knowledge Tracker system address (the email address assigned to the library, ending with "@knowledgetrackerlib.com").

To specify a local email address to be used by default, as with responses to web form request, enter the address in the "Default Redirect Email" field on the System Options screen.

Desk Tracker

For libraries using the Desk Tracker public services statistics system (http://www.DeskTracker.com), it is possible to create Knowledge Tracker tickets from Desk Tracker events into the Knowledge Tracker system.

Manual Entry

Staff members using Knowledge Tracker can manually create a new ticket with any relevant information, match the ticket to a new or existing patron, and/or assign the ticket to a staff member, as desired.

For Staff Members

Staff member accounts can be set up in Knowledge Tracker with a wide range of permissions and options. How Knowledge Tracker appears to a staff member depends on whether they are an administrator, have access to all system tickets or only those assigned to them, and is based on the specific menu options and security levels set for their account.

Access

Access to the staff version of Knowledge Tracker is through the *Staff URL* provided in the account documentation.

Working with Tickets

Ticket Dashboard (*Tickets* menu → *Dashboard*)

After signing in, staff members will see this screen with current open tickets in a sortable list.

Depending on the user account settings, the dashboard list may show all open tickets, or only those assigned to the staff member logged in (see *Managing People*).

Knowledge Tracker can mark as *overdue* tickets that have not been updated in a certain number of days (see *System Options*). Any overdue tickets will appear at the top of the dashboard list.

Clicking any column header will sort the list by that field in alternately ascending and descending order.

Clicking a ticket number will open the *Ticket Details* screen.

In the dashboard list, a checkbox appears next to each ticket. By checking tickets, and then choosing an action from the *With Selected* drop-down menu below the list, it is possible to delete or update the status of several tickets at a time.

Creating a Ticket (*Tickets* menu → *New Ticket*)

Tickets can be manually created on this screen. Click the *Create New Ticket* link, enter a patron name and email (if available - the ticket will be matched based on email to a patron record, if one exists), enter the question, and click *Create.* Details of the new ticket can be edited by clicking on the ticket number in the *Ticket Dashboard.*

Ticket Details

Most work in Knowledge Tracker takes place in the *Ticket Details* screen, where staff members can view request details and communicate with patrons, make comments and changes, forward tickets to "outside experts," and are able to publish publicly available answers, based on the ticket, to public FAQ and knowledge base pages.

Transcript

The transcript lists all communication related to the ticket, plus details on any changes or other significant actions.

The original post, whether it is a web form request, email, Desk Tracker event, or manual entry, will be listed at the top of the transcript. Subsequent communications, changes, or actions, will be listed below.

Ticket Settings

The *Ticket Settings* section allows staff members to make the following changes:

Status Change the current status of the ticket.

Assignee Assign or reassign the ticket to a staff member. The assignee will receive by email new communications from the patrons and will see the open ticket on their *Ticket Dashboard* list.

Patron The patron matched to the ticket will receive notifications by email of all updates made by staff members (but not internal comments and other system changes), and will see the open ticket on the *Ticket Dashboard* list for their account.

When a web form or email request is received, a patron is automatically matched to the ticket based on the email address provided.

It is possible to change the patron matched to the ticket by selecting a new patron account.

Custom Fields In addition to the built-in fields listed above, the *Ticket Settings* section also includes any custom fields created by the library to track additional information. For details on custom fields, see *Customizing Ticket Structure.*

Delete Ticket

A ticket can be completely removed from the Knowledge Tracker system by clicking the *Delete Ticket* link. This action is permanent, and in most cases, it is better to change the status of a ticket to "closed" rather than delete it.

View Web Form Details

Clicking the *View Web Form Details* link opens, on a new screen, a complete list of data submitted for tickets of web form origin. It is also possible to expand web form details within the ticket transcript by clicking the *show web form details* link.

Publish

The *Publish* link guides you through the process of creating publicly-available answers using existing tickets. See *Publishing Tickets* for details.

Respond/Comment/Forward Tool

The *Ticket Details* screen includes a text editor with the following three tabs:

Respond Responses are the primary mode of communication between staff members and patrons. Responses are posted to the transcript and, if the ticket is matched to a patron, delivered to the patron's email address. When a staff member responds to a ticket, that ticket will be automatically assigned to them.

Comment Comments are internal postings which appear only in the staff ticket view. They are not emailed to patrons and are not available in patron or public ticket views.

Forward Forwarding is designed to facilitate consultation with "outside experts" who do not have a Knowledge Tracker account. Email replies from the recipient will be captured in the ticket transcript.

Drafts

Any text in the Respond/Comment/Forward box may be saved as a draft by clicking the *Save as Draft* button. Any saved drafts will be available in the *Editor Tools* area.

Editor Tools

A set of tools will appear next to the Respond/Comment/Forward box when the link *show editor tools* is clicked.

HTML Elements By clicking on *Image* or *Link*, staff members can enhance their responses by inserting images or links to outside web pages.

Boilerplate Text Knowledge Tracker allows staff members to utilize saved boilerplates for text composition. All saved boilerplates available to the staff member are displayed in the boilerplate drop-down list. When a boilerplate is selected, it will be

inserted into the editor box. To add and manage boilerplate text, see *Managing Boilerplates.*

Drafts Drafts created with the "Save as Draft" button can be inserted into the text box. When posting a response containing text from previous drafts, the staff member will have the option to save the draft for future use.

Transcript This tool inserts the ticket transcript into the editor box. Only staff and patron replies will be inserted, not system information or comments.

Important Note: Patron names and email addresses are automatically stripped from the headers of inserted transcripts. However, it is important to screen the body of any message using ticket transcript text for personal or private information.

Navigating the Ticket Details Screen

The *Ticket Details* screen includes two "anchor" links to speed the common task of skipping between the top of the screen and the editing section. The [*Post]* link at the top of the transcript positions the screen at the Respond/Comment/Forward box, while the *[Top]* link below the box positions the screen at the top.

Exception Tickets

When Knowledge Tracker cannot process an incoming email due to a formatting problem or other error, it will create an *Exception Ticket*. Exception tickets are created with two transcript items: The failed incoming email message, and a basic explanation of the problem.

Exception tickets can be forwarded, modified, assigned, and otherwise treated like normal tickets, but allow three other actions:

- **Delete**

The option of deleting exception tickets can be made available to users who do not have permission to delete standard tickets.

- **Approve**

Approving an exception ticket removes the delete/approve/merge options and makes the ticket behave like any other. This is the best choice if the failed email is a standalone request that doesn't relate to another ticket.

- **Merge**

This option merges transcript of the failed email with another ticket specified by the staff member. This is useful when the email is obviously a reply to an existing ticket.

Publishing Answers

Publish Wizard

Click the *Publish* link on the *Ticket Details* screen to build public FAQ and Knowledge Base pages based on existing tickets. The publication process involved three screens:

Screen 1:

Publish to FAQ
Check this box to make the published answer appear in applicable FAQ pages. Once the box is checked, you can assign the answer to one or more FAQ categories (for details on creating category-specific pages, see *Managing FAQ and KB Categories*).

Publish to Knowledge Base
Check this box to make the published answer available in knowledge base search results. Once the box is checked, you assign the answer to one or more Knowledge Base categories (for details on creating category-specific pages, see *Managing FAQ and KB Categories*).

Enable
Answers must be enabled in order to be available on FAQ and Knowledge Base pages. To create an answer as a "draft" to activate later, leave this box unchecked.

Screen 2:

Select Question
The transcript item selected on this page will be the question in the question/answer set. You can modify the text of the question later through the *Published Answers* screen.

Screen 3:

Select Answer
The transcript item selected on this page will be the answer in the question/answer set. You can modify the text of the answer later through the *Published Answers Dashboard*.

Published Answers Dashboard (*Tickets* menu → *(Published Answers*)

This screen lists all answers that have been published, either from existing tickets, or manually. Click on a question to view and edit details, and modify FAQ and knowledge base assignments.

Create New Answer

Use this section to add an answer manually by entering a question and answer, and indicating whether the answer will be immediately enabled (visible on applicable FAQ and knowledge base pages). Once the answer is created, FAQ and knowledge base categories can be assigned by opening the answer details from the *Published Answers Dashboard*.

Searches and Reports

Quick Search

A Quick Search box appears at the top of every screen in the staff view. The Quick Search is also available via the *Quick Search* item in the *Reports* menu.

To run a Quick Search, enter a search term in the box, then press Enter or click the hourglass icon (for the *Quick Search* box at the top of the screen), or use the *Search* button (for the *Quick Search* page). If the search matches any tickets, they will be displayed in a sortable list.

Quick Search displays all tickets where the search term matches one or more of the following areas:

- Ticket number
- Ticket status
- The original web form, email, or Desk Tracker transcript
- Assigned staff member (name, username, and email)
- Patron (name and email)
- All text-based or numeric custom ticket fields

Clicking the ticket number of any ticket displayed in the search results will open the *Ticket Details* screen. Clicking the *Return to Search Results* link on the *Ticket Details* will reload the Quick Search results.

Report Builder (*Reports* menu → *Report Builder*)

Powerful searching and reporting is available with the *Report Builder.* The *Report Builder* allows searching on one or more custom conditions, and returns results in either a sortable list, export file, or bar graphs.

On the *Report Builder* click either *Create a New Report* or the name of an existing report. Details can be viewed and modified on the *Report Details* screen.

Report Detail

The following basic options are available:

Report Name

Owner Owners have the ability to modify reports.

Condition Type Each report can display either those tickets that match "Any" of the conditions created, or "All" conditions.

Shared A shared report will be available system-wide. Reports that are not shared will only be available to report owners.

Report Conditions

Report results are based on one or more conditions. A condition is created by choosing the *Type* of condition (for example, ticket status or origin), how the condition behaves (for example, "is" or "is not"), and a specific value. The following condition *Types* are possible:

Status Possible values are "new," "closed," "updated," or several other system status levels, or custom status levels set up for the library.

Assigned To The staff member assigned to the ticket

Origin Origin refers to how tickets were first created. Possible values are "web form," "email," "Desk Tracker," or "manual."

Ticket Detail This option allows matches against any other data point or "field" associated with the ticket. It is possible to search against the date a ticket was created or last updated, or any custom ticket fields.

Ticket Text A ticket text search matches the search term entered against the full transcript of each ticket, including the original web form or email request or the original Desk Tracker transcript.

From For direct email requests. The email address of the sender.
To For direct email requests. The destination email address. This could be your system email address (@knowledgetrackerlib.com) or a local email account set to forward messages to your system email address.

Subject For direct email requests. The email subject line.

Report Mode

The following modes are available:

Display List Results are returned as a sortable list.

Export Results are downloaded to the staff member's computer as a comma-delimited file compatible with most spreadsheet and data applications.

Graphs	Visual graphs provide basic information on the search set returned.

For both the *Display List* and *Export* modes, it is possible to select from a list which ticket fields will be returned.

Once a report is set up, clicking *Run Report* will return the search results as specified under *Report Mode*.

Managing People

My Profile (*My Account* menu → *My Profile*)

Any staff member signed in to Knowledge Tracker can change their own account details using the *My Profile* screen. Name, email, and password can be modified.

Staff Dashboard (*Admin* menu → *Staff*)

Staff member accounts can be added, removed, or modified through the *Staff Dashboard* screen.

Staff Accounts

A sortable list of staff member accounts is listed in this section. Clicking the last name for any account loads the *Staff Detail* screen for that staff member.

Deleting a Staff Account

A staff account can be deleted by clicking the red *"X"* delete icon next to the account in *the Staff Accounts* list.

When a staff account is deleted, all Knowledge Tracker responsibilities and assignments **must be transferred to another staff account**. After the delete icon next to a staff account is clicked, another staff account must be selected for this transfer.

Notifications, assignments and ownership of tickets, boilerplate text, and reports will be transferred to the selected staff account. Menu permissions and security rules will not be transferred. Files uploaded by the deleted person will no longer be associated with any particular staff member.

Create New Staff Account

A new staff member account can be created by clicking the *Create New User* link to display a form, filling out all fields, and clicking *Create...*

See the *Staff Detail* for descriptions of the fields available in the *Create New User* form.

Staff Detail

The following fields can be modified on the *Staff Detail* screen:

- **First Name**
- **Last Name**
- **User Name**
- **Password**
- **Active**
  Inactive User accounts cannot sign in.
- **Administrator**
  Administrator accounts have access to all areas of Knowledge Tracker, unless otherwise designated with a custom security condition (see *Security*).
- **Ticket View**
  Staff member accounts can be set to view all open tickets in the *Ticket Dashboard*, or only those tickets assigned to that account.

Menu Items

The menu options available to each staff account are specified in the *Menu items* section. For more powerful permission control of staff accounts, see *Security.*

Patron Dashboard (*Admin* menu → *Patrons*)

Patron accounts can be added and removed through the *Patron Dashboard* screen.

Patron Accounts

A sortable list of patron accounts is listed in this section. Clicking the email link for any account loads the *Patron Detail* screen.

Deleting a Patron Account

A patron account can be deleted by clicking the red *"X"* delete icon next to the account in the *Patron Accounts* list. Any tickets matched to the deleted patron will no longer match to any patron.

Manually Creating New Patron Accounts

Patron accounts are created automatically when patrons submit web form or email requests. However, a new patron member account can be created manually by clicking the *Create New Patron* link to display a form, filling out all fields, and clicking *Create...*

Patron Detail

The *Patron Detail* screen displays the name and email for the selected patron account.

Customizing Knowledge Tracker

System Options (*Admin* menu → *System Options*)

Most of the behavior of Knowledge Tracker is customizable, from the format of system emails and web form messages, to the way in which tickets are displayed. Many of these customization options are accessed through the *System Options* menu. The following settings are available in *System Options:*

- **Overdue Days**
  After this many days of inactivity, open tickets will be marked overdue.

- **Accept Email Requests**
  If set to *Yes*, email messages sent to the system email address, which are not replies to existing tickets, will cause a new ticket to be created. If set to *No* all emails not related to existing tickets will be returned to the sender with the message specified with the *Default Email Bounce* Message option. Accepting email requests give patrons an easy contact method, but makes the account vulnerable to spam.

  See *How Tickets Are Created* for more information on accepting email requests.

- **Default Email Bounce Message**
  If *Accept Email Requests* is set to *No*, email messages that are not replies to existing tickets will be returned to the sender with the *Default Email Bounce* message.

  Default Web Form Email Subject
  The default subject for the email to patrons sent in response to web form requests.

  It is possible to override this subject for a particular web form by including a specific subject as a hidden form input with the name and id "form_custom_email_subject".

- **Default Web Form Response**
  The default message included with sign-in information in the email sent to patrons in response to web form requests. This message is optional.

  It is possible to override this default message for a particular web form by including a specific message as a hidden form input with the name and id "form_custom_message".

- **Default Web Form Screen Confirmation**
  The default message displayed in the browser when a web form is submitted (if the web form is not redirected – see *Default Web Form Redirect*).

  It is possible to override this confirmation message for a particular web form by including a specific confirmation message as a hidden form input with the name and id "form_custom_screen_confirmation".

- **Default Web Form Redirect**
  The default web page to load after a web form request is submitted.

  It is possible to override the redirect location for a particular web form by including a URL in a hidden form input with the name and id "form_custom_webform_redirect".

- **Patron Update Notification Email Subject**
  The email subject line for patron responses sent to staff members.

- **Staff Update Notification Email Subject**
  The email subject for staff responses sent to patrons.

- **Days to Display Closed Patron Tickets**
  The number of days that closed tickets will be displayed in the patron view.

- **Reply to Initial Email Request – Subject**
  Email subject for the message sent in response to initial email contact.

- **Default Redirect Email**
  The library email address used by default for Knowledge Tracker activity (for example, "reference@yourlibrary.edu"). This email account must be manually set to forward emails to the library's assigned Knowledge Tracker system email address.

Customizing Ticket Structure (*Admin* menu → *Ticket Template*)

Knowledge Tracker provides a high level of control over what data is stored in tickets. Many of the options for modifying ticket structure are available on the *Ticket Template* screen.

System Status Options

This section lists the built-in status levels that may be assigned to a ticket (for example, "new," "closed," and "updated").

User Status Options

In addition to the system status levels, staff members can designate additional status levels. Once created, these status levels can be assigned to tickets.

To add a custom status level, click *Create New Status.*

Custom Fields

Additional data fields can be designated for a library's ticket template. Custom fields appear in the *Ticket Settings* area of the *Ticket Detail* screen, are searchable through the *Report Builder*, and can be used to trigger automatic assignments and notifications (see *Automatic Assignments and Notifications*).

Clicking on a custom field will open the *Custom Ticket Field Editor.*

Create New Custom Ticket Field

To add a custom field, click the *Create New Custom Ticket Field* link. In the expanded form, enter a name for the new custom field, and select the type of field. The following field types are available:

- **Text Box (small)**
  Displayed as single-line text box. Appropriate for labels and short comments.

- **Text Box (large)**
  Displayed as a multiple-line text box. Appropriate for comments and other lengthy text.

- **Numeric**
  Displayed as a single-line text box. Numeric fields accept only whole, positive numbers.

- **Date**
  Displayed as a single-line text box with pop-up calendar tool.

- **Date & Time**
  Displayed as a single-line text box with pop-up calendar tool.

- **Dropdown**
  Displayed as a drop-down box. It is possible to specify an unlimited list of options for drop-down fields.

Custom Ticket Field Editor

This section allows custom fields to be renamed and modified. It is also possible to change the field to another, similar type (for example, a small text box field can be changed to a large text box field).

For drop-down fields, the *Custom Ticket Field Editor* allows drop-down choices to be added and removed. Click *Custom Ticket Field Editor* to add a new option.

Managing Boilerplates (*Admin* menu → *Boilerplates*)

The boilerplates available for insertion on the *Ticket Detail* screen can be administered on the *Boilerplate Dashboard* screen. A sortable list of boilerplates appears at the top of the screen. Clicking on the name of a boilerplate opens the *Boilerplate Detail* screen.

New boilerplates can be created by clicking on the *Create new Boilerplate* link.

Existing boilerplates in the list can be deleted by clicking on the red "X" delete link.

Boilerplate Detail

Boilerplate details and availability can be modified on the *Boilerplate Detail* screen. The following fields are modifiable:

- **Description**
- **Available to All Users**
  If this field is set to "Yes," the boilerplate will be available on the *Ticket Detail* screen for all accounts. Otherwise, availability will be based on settings in the *Users* and *Productivity Groups* sections below.
- **Text**

Users

Staff accounts appearing in this list will have access to the boilerplate on their *Ticket Detail* screen. If *Owner* is set to "yes," the account will also have permission to modify the boilerplate on the *Boilerplate Detail* screen.

Productivity Groups

When a Productivity Group is included in this list, all members of that group will have access to the boilerplate on their *Ticket Detail* screen. If *Owner* is set to "yes," all members of the group will have permission to modify the boilerplate on the *Boilerplate Detail* screen.

See *Managing Groups* for more information on Productivity Groups.

Automatic Assignments (*Admin* menu → *Assignment Rules*)

Knowledge Tracker has the capability to automatically assign newly created tickets to certain staff members based on a customizable set of rules.

Tickets are assigned at the time they are created in response to an incoming email or web form request, or a Desk Tracker event escalation.

The *Auto-Assignment Rule Dashboard screen* contains a sortable list of existing assignment rules. To delete an assignment rule, click the red "X" delete icon. Clicking on the name of an assignment rule opens the *Auto-Assign Rule Detail* screen.

To specify a new set of conditions for automatically assigning tickets, click the *Create New Auto-Assign Rule,* enter a name for the rule and the staff member to whom tickets will be assigned, and click *Create.* Specific conditions for the assignment rule are set on the *Auto-Assign Rule Detail* screen.

Auto-Assign Rule Detail

On this screen auto-assign rules can be modified and conditions specified. Basic details that can be modified are:

- **Name**
- **Check Conditions**
  Determines if a ticket will be assigned if it meets "All" of the conditions listed in the rule, or "Any."
- **Priority**
  Used to resolve conflicts between auto-assign rules, where more than one assignment rule matches a given ticket. Tickets will be assigned to the staff member listed on the highest-priority assignment rule.
- **Assign To**

Conditions

Tickets are matched to *Auto-Assign Rules* based on the specific conditions listed for that rule. Conditions can be set to match based on the origin of the ticket, or specific values in the ticket itself. For more on conditions, see the *Report Builder* section.

Automatic Notifications (*Admin* menu → *Notification Rules*)

Notifications rules are similar to assignment rules in that they match against tickets based on specific conditions. However rather than assigning a ticket to one staff member, the notification system sends an email to a list of staff members with ticket details.

The *Notification Rule Dashboard screen* contains a sortable list of existing notification rules. To delete a notification rule, click the red "*X*" delete icon. Clicking on the name of an notification rule opens the *Notification Rule Detail* screen.

To specify a new set of conditions for notifying staff members about tickets, click the *Create New Notification Rule,* enter a name for the rule, and click *Create.* Then, click on the new notification rule in the list, and complete the notification settings in the *Notification Rule Detail* screen.

Notification Rule Detail

On this screen notification rules can be modified and conditions specified. Basic details that can be modified are:

- **Name**
- **Check Conditions**
  Determines if a ticket will be assigned if it meets "All" of the conditions listed in the rule, or "Any."
- **Notification Message**
  Optional text which will be included in the email notification to staff members when this notification rule is used.

Conditions

Tickets are matched to *Notification Rules* based on the specific conditions listed for that rule. Conditions can be set to match based on the origin of the ticket, or specific values in the ticket itself.

For more on conditions, see the *Report Builder* section.

People to Notify

Staff members in this list will receive an email notification when a ticket matches the specified notification rule.

Groups to Notify

All members of the Productivity Groups in this list will receive an email notification when a ticket matches the notification rule.

Managing FAQ and Knowledge Base Categories

Closed Knowledge Tracker tickets can optionally be published to publicly available knowledge base and FAQ pages. For instructions on publishing tickets, see the *Ticket Details* screen.

To create category-specific knowledge base and FAQ pages, add categories to the *FAQ Categories* and/or *Knowledge Base Categories* lists.

Managing Groups (*Admin* menu → *Groups*)

Two types of groups can be maintained in Knowledge Tracker:

Productivity Groups
Productivity groups are used for group notifications (see *Automatic Notifications*) and boilerplate text sharing (see *Managing Boilerplates*).

Security Groups
Security groups are used to control Knowledge Tracker access in combination with custom security rules (see *Security*).

A list of groups appears under both headings. To delete a group, click the red *"X"* icon. Clicking on the name of a group opens the *Group Detail* screen.

To add a group, click on either the *Create New Productivity Group* or the *Create New Security Group* link, enter a name for the group, and click *Create.* Add members to the group by clicking on new group to load the *Group Detail* screen.

Group Detail

This screen allows both Productivity and Security Groups to be renamed, and their membership managed.

Member List

This section of the *Group Detail* screen contains a list of all current members of the selected group. To remove a staff member from the group, click the red *"X"* icon next to their membership record.

To add a staff member to the group, click the *Add New Group Membership* link, select the staff member, and click *Create*.

Custom Security Dashboard (*Admin* menu → *Custom Security*)

Custom security rules in Knowledge Tracker allow almost any area of the system to be restricted to certain users. In combination with the ability to control the availability of menu items for each staff member in the *Staff Detail* screen, custom security provides a high degree of control over staff member permissions.

There are three basic types of custom security rules: *System Area*, *Table Update*, and *File.*

System Area

System Areas are predefined sets of screens and/or functions which can be secured as a group. Creating a security rule for a System Area restricts the screens and/or functions to only staff members with explicit permission to access them. The following is a list of System Areas that can be secured:

- **Delete Tickets**
  The ability to delete normal tickets by clicking the *Delete Ticket* link on the *Ticket Detail* screen. This area **does not include** the ability to delete exception tickets (see *Exception Tickets*), which must be secured separately.

- **User Administration**
  Access to the *Staff Dashboard* and *Staff Detail* screens.

- **Patron Administration**
  Access to the *Patron Dashboard* and *Patron Detail* screens.

- **Reports**
  Access to the *Report Builder* screen and *Quick Reports.*

- **Security Administration**
  Access to the *Custom Security Dashboard*

Table Update

Table Update security rules protect specific types of data records from changes by all staff members except those with explicit permission. The following list of possible *Table Update* rules describes the effect of each on staff members who do not have the necessary permissions.

- **ticket**
  Makes the *Ticket Settings* section of the *Ticket Detail* screen non-editable.

- **ticket_response**
  Prevents the editing of transcript records for a ticket. Does not prevent the posting of new transcript items.

- **user**
  Makes the *Staff Detail* screen non-editable. Does not prevent or change access to the *My Profile* screen.

- **patron**
  Makes the Patron Detail screen non-editable. Does not prevent or change access to the My Profile screen.

File

File security rules allow any screen in Knowledge Tracker to be secured.

All URLs (the web address, listed in the Internet browser's address box) in the staff view of Knowledge Tracker have a format like the following example from the *System Options* screen:

http://client.knowledgetrackerlib.com/index.php?act=inc_adm_system_options.php

Note that after "act=" is the name of a file ending in ".php". In the case of the above example, the file name is "inc_adm_system_options.php". By creating a File security rule with this file name, access to the screen (in this case, *System Options*) can be restricted.

Creating a New Custom Security Rule

To create a new rule, click the *Create New Security Rule* link on the *Custom Security Dashboard* screen, enter a name for the new security rule, select a *System Area* **or** select a *Table Update* type **or** enter the name of a .php file. When the form is completed, click *Create.*

Once the security rule is created, an access list for the rule must be created on the *Security Rule Detail screen.* Otherwise, all staff members will be locked out of the secured screen or functions.

Clicking on the name of a security rule will open the *Security Rule Detail* screen.

Security Rule Detail

On this screen a security rule can be renamed, modified, and its access managed.

Access List

The *Access List* shows all staff members and groups who have access to the screens and/or functions restricted by the security rule.

To add access to the security rule, click the *Create New Access* link, select a staff member or security group and click *Create.* For details on security groups, see *Managing Groups.*

Generating HTML (*Admin* menu → *Generate HTML*)

Knowledge Tracker facilitates the development of related external web pages by generating common HTML code which can be copied and pasted into an HTML editor.

From the *Generate HTML* screen, three choices of HTML code are available: *Web Form, FAQ Page,* and *Knowledge Base Search Box.*

Web Form HTML Generator

Knowledge Tracker processes requests submitted from any web form (see *How Tickets Are Created*). However, web forms must contain certain required elements and the *Web Form* HTML Generator tool assists in creating complaint forms.

HTML code is generated by clicking on elements in the *Form Elements* section in the order in which they should appear in the code, then copying the code from the *HTML code* section.

The following elements are available:

Basic Elements

This section includes the following basic HTML tags required for web forms.

- **Form Opening Tag**
- **Form Closing Tag**
- **Submit Button**
- **Line Break**

Ticket Fields

This section allows form inputs to be inserted which match any custom fields created for the library's ticket structure. All custom fields are listed, and clicking on a field name inserts an HTML "<input>" tag in the *HTML code* box.

Hidden Form Inputs

This section allows the following hidden input fields to be inserted, which affect the way Knowledge Tracker processes incoming form requests:

- **Library Account Number**
  (Required) This field identifies the library account to Knowledge Tracker.

- **Set Main Field Input**
  (Optional) This field tells Knowledge Tracker which form input should be used as the first entry of the ticket transcript. In most cases it will be the main text box on the form, where patrons describe their request. If this input is not provided, Knowledge Tracker will expect a form input with the name and id "question".

<u>FAQ Page HTML Generator</u>

This tool generates HTML for stand-alone FAQ pages that can be posted on library websites outside of the Knowledge Tracker system.

FAQ Categories

As described in the *Ticket Details* section, closed tickets that are published to the FAQ system may be assigned to one or more FAQ categories in addition to the general FAQ.

A link corresponding to every FAQ category will appear on the *FAQ Page HTML Generator* screen. Clicking on a category link will generate HTML for a FAQ page of tickets published to that category

Clicking on the link *Generate a comprehensive FAQ* will generate HTML for a FAQ page including all tickets published to the FAQ system, regardless of category.

Knowledge Base HTML Generator

Unlike FAQ pages, knowledge bases are active search engines that communicate with Knowledge Tracker and return results within the Knowledge Tracker system.

However, it is possible to add Knowledge Tracker knowledge base search boxes to external websites. After submitting a search term, the user will be redirected to a Knowledge Tracker page with a list of results.

The *Knowledge Base HTML Generator* generates HTML for Knowledge Tracker knowledge base search boxes that can be added to external web pages.

Knowledge Base Categories

As described in the *Ticket Details* section, closed tickets that are published to the knowledge base system may be assigned to one or more categories.

Knowledge base search boxes can be created that restrict searches to specific categories, or allow patrons to select a category to search. The following links are available on the *Knowledge Base HTML Generator* screen:

- ***Comprehensive search box without category select drop-down***

  The user *will not* have the option to specify a specific category. The search will return results from all closed tickets published to the Knowledge Tracker system.

- ***Comprehensive search box without category select drop-down***

  The user *will* have the option to specify a specific category. The search will return results from all closed tickets published to the Knowledge Tracker system if no category is specified. Otherwise, the search will be limited to tickets assigned to the specified category.

- **Category-specific search box** (click the link on the *Knowledge Base HTML Generator* screen for the desired category.)

  The search will be limited to tickets assigned to the predefined category. The user *will not* have the option to specify another category or search the larger set of tickets.

For Patrons

This section covers Knowledge Tracker as used by patrons with active tickets.

Access

Access to the patron version of Knowledge Tracker is through the *Patron URL* provided in the account documentation.

Account Creation

When Knowledge Tracker processes a web form or email request, an account is created for the patron (if one does not already exist, based on the patron's email address), and the patron is sent an email confirmation.

When a new patron account is created, a random password is generated for the account and is delivered to the patron by email. The patron is required to change their password when they sign in to Knowledge Tracker for the first time.

Email Communication

Signing in to Knowledge Tracker is optional for patrons. Responses by staff members and other notifications are delivered to the patron by email, and patrons can reply directly to Knowledge Tracker emails.

Working with Tickets

Ticket Dashboard – Patron

When a patron does sign in to Knowledge Tracker, a sortable list of all of their open tickets is loaded, similar to the staff *Ticket Dashboard.*

Clicking a ticket number will open the patron *Ticket Details* screen.

Ticket Details – Patron (*Tickets* menu → *Dashboard*)

The patron *Ticket Details* screen is similar to the staff version, but with far fewer capabilities. Patrons can view the ticket transcript and post a text response.

Transcript

The patron view of the transcript includes the original request, plus all patron and staff responses. It does not include staff comments, forwards, and details of ticket changes made by staff members.

Respond Box

Patrons can post a text response to an open ticket. When a patron responds to a ticket, either by email or through the *Ticket Detail* screen, notifications are sent to the assigned staff member and any other staff members included in applicable notification rules (see *Automatic Notifications*).

My Profile – Patron (*My Account* menu → *My Profile*)

On this screen, patrons can change basic account information and their password. When a patron chooses to change their password, they will be asked to sign in again, and to confirm their old password.

Public Pages

In addition to the pages listed above, patrons signed into Knowledge Tracker also have access, through menu items, to the library's public FAQ and knowledge base pages (see *For The Public).*

For The Public

Access

Access to the public version of Knowledge Tracker is through the Public URL provided in the account documentation.

Public content and access to Knowledge Tracker may also be provided on websites outside the Knowledge Tracker system (see *Generating HTML*).

FAQ Pages

FAQ pages, whether accessed through Knowledge Tracker or on an outside website, follow a standard, single-page format, where the top of the page contains question links that "point" to answers further down the page.

For information on publishing FAQ Pages see *Ticket Details* and *HTML Generation*.

Knowledge Base Pages

A general knowledge base search box is available through the patron menu (*Search* menu item).

Patrons may also begin knowledge base searches from external websites. All knowledge base searches will redirect to a Knowledge Tracker page with a list of tickets matching the search term. Clicking on a ticket description loads publicly available details of the ticket.

For information on publishing knowledge bases and search boxes see *Ticket Details* and *HTML Generation*.

Integrating Knowledge Tracker with the Library Website

Knowledge Tracker integrates with the website of the subscribing library in two important ways. First, it can process requests submitted through any library web form. Second, published Knowledge Tracker tickets can be made available through external library web pages in the form of FAQ pages and knowledge base search boxes.

Integrating Knowledge Tracker with Library Web Forms

Building web forms or integrating existing web forms with Knowledge Tracker requires basic web page editing skills. However, only a few steps are required, and Knowledge Tracker provides tools to simplify the integration process.

The topics described in this section must be addressed in order to successfully integrate an outside web form. ***Note*: Many of the following steps can be performed automatically by Knowledge Tracker (see *Web Form HTML Generator).***

Setting the Web Form Target

In order to direct web form requests into the Knowledge Tracker system, the "action" parameter of the HTML <form> must be set to the *Web Form Target URL* provided in the account documentation.

Standard Form Inputs

All form inputs on a web form submitted to Knowledge Tracker system will be captured and included in the transcript for the new ticket.

The form input specified by the *Main Field Input* hidden form input (see *Hidden Form Inputs*) will be used for the first transcript entry in the new ticket. If no input is specified, Knowledge Tracker will expect a form input with the name and id "question".

Any web form input with a name and id matching the name of a custom ticket field (see *Customizing Knowledge Tracker*) will have its value translated directly to the ticket field when the web form is submitted. For example, if a custom ticket field is created with the name "category" and a request is received through a web form with a form input named "category", the value of the form input will be translated directly to the newly created ticket.

Hidden Form Inputs

The following hidden form inputs can be included in the body of the HTML form. Hidden form inputs marked "required" **must** be included on the web form for it to communicate correctly with Knowledge Tracker.

- **Library Account Number (Required)**

  The body of the form must include a hidden HTML <input> tag with its id and name set to "library" and its value set to the *Library Account Number* provided in the account documentation.

- **Main Field Input (Optional)**

  Input name and id: "form_main_input_field"

  The name of the form input that will be used as the first entry of the ticket transcript. In most cases it will be the main text box on the form, where patrons describe their request. If this input is not provided, Knowledge Tracker will expect a form input with the name and id "question".

- **Webform Email Subject (Optional)**

  Input name and id: "form_custom_email_subject"

  The subject for email messages sent to patrons in response to web form requests. If this input is not included, Knowledge Tracker uses the subject specified in the system option "Default Webform Email Subject."

- **Webform Response (Optional)**

  Input name and id: "form_custom_message"

  Text included in the body of email messages sent to patrons in response to web form requests. If this input is not included, Knowledge Tracker uses the text specified in the system option "Default Webform Response."

- **Webform Screen Confirmation (Optional)**

  Input name and id: "form_custom_screen_confirmation"

  Confirmation text displayed after the web form is submitted. If this input is not included, Knowledge Tracker uses the text specified in the system option "Default Screen Confirmation."

  The Knowledge Tracker confirmation screen is only displayed if a web redirect URL is not specified in either a hidden input or system option (see Hidden Form Input: Webform Redirect).

- **Webform Redirect (Optional)**

  Input name and id: "form_custom_webform_redirect"

The default webpage to load after the web form is submitted. If this input is not included, Knowledge Tracker uses the URL specified in the system option "Default Webform Redirect."

Captcha and Privacy Policy Screen

When a web form is submitted to Knowledge Tracker, the user submitting the form will be required to enter a series of characters from an image (known as "captcha") in order to complete the web form submission. This process prevents spam by verifying that the submitter of the form is a human being and not a "bot."

Also on this intermediary screen, is a link to the Knowledge Tracker privacy policy.

Bypassing the Captcha and Privacy Policy Screen for Applications

Libraries with electronic systems that automatically submit form requests may need to bypass this captcha screen in order for their systems to function correctly. This can be accomplished by including the following HTML in the web form data:

```
<input type="hidden" name="bypass_confirmation" id="bypass_confirmation" value="true" />
```

If this hidden value is included in the form submit, a Knowledge Tracker ticket will be generated immediately, without the need to complete the captcha screen.

Since the captcha and privacy policy screen provides patrons with important information on privacy, ***this bypass process is for electronic systems only and not for standard web forms.***

Webform HTML Notes

Technical tips for creating web forms that work correctly with Knowledge Tracker.

1. Checkbox Sets

In addition to standard form elements, it is possible to create one-or-many checkbox fields on web forms that submit to Knowledge Tracker. An example would be a field labeled *Request Type* with the options *Reference Request*, *Interlibrary Loan*, etc., where more than one option can be entered.

The standard approach to creating HTML code for this scenario is to create multiple *checkbox* inputs with the same name. In order for each selected option to be captured correctly by Knowledge Tracker, the *name* attribute must be followed by "[]" - for example:

```
<input name="qtype[]" value="ref" type="checkbox">Reference Request<br>
<input name="qtype[]" value="copies" type="checkbox">Photocopy Request<br>
<input name="qtype[]" value="scans" type="checkbox">Scan Request<br>
<input name="qtype[]" value="ILL" type="checkbox">Interlibrary Loan
```

Questions and Support

For further assistance, customization, questions, and support, please contact us.

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8/30/16

- Removed outdated sections: Managing Files, File Detail, and Uploaded Files**.**