Knowledge Base

Planon Software Suite
Version: L105

Planon

Building Connections

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Knowledge Base

In many organizations, the facility management (FM) and ICT service desks have been combined into a single service and information provider. In Planon ProCenter , this link can be made by making the Knowledge base functionality available in Work Orders and Assets .

Frequently recurring ICT or other problems can be registered in this Knowledge base together with symptoms and solutions, which enables users to retrieve and apply the available knowledge.

Knowledge base items can be added, deleted and transferred to the digital archive in the Knowledge Base TSI.

> Knowledge base items are user-defined business objects. This means that it is possible to configure your own types of knowledge base items in Field definer . You can also configure user-defined statuses and status transitions for Knowledge base items in Field definer .

> For more information, see Creating user-defined business objects(Field definer).

Working with Knowledge Base

This section describes how to add and maintain a list of Knowledge base items.

Provided that you have the appropriate authorization, you can add and maintain Knowledge base items as required.

> ℹ️ For more information about authorization, see Authorization.

See the links below for more information:

- Adding a knowledge base item
- Linking digital documents
- Linking orders to a knowledge base item
- Linking assets to a knowledge base item
- Archiving knowledge base items
- Retrieving orders that are linked to knowledge base items

Knowledge base categories

A structure allowing you to classify knowledge base items. Knowledge base categories represent a hierarchy. Each category can have multiple sub-categories. You can link knowledge base items to these categories. Each knowledge base item is linked to a single category.

Example

A knowledge base categories structure may look like this:

- Networks
  - Ethernet
  - Wireless
  - VPN connections
- Hardware
  - Desktops
  - Laptops
  - Screens
  - Printers
- Software

- Standard workplace software
- Specialized software

Configuring knowledge base categories

Knowledge base categories enable you to structure knowledge base items. This section describes how you can create a category structure and link Knowledge base items to it.

> ℹ️ On the Knowledge base web form, the category structure defined here will be displayed as clickable breadcrumbs:
>
> ▲ All categories / Communications / Phone /

Procedure

1. Go to Knowledge base > Knowledge base categories.
2. Here, click Add.
3. In the data panel, complete the relevant fields.

For a description of these fields, see Knowledge base categories.

4. Click Save.

Knowledge base

Knowledge base - categ...   Knowledge base items

No filter

Description   ⇕ Contains

Knowledge Base - category (9)
  ▼ 📂 Facility Management
      📄 Cleaning
  ▼ 📂 Human Resources
      📄 Leave request
  ▼ 📂 ICT
      📄 Email
      📄 Printers & Copiers
  ▼ 📂 Maintenance
      📄 Air Conditioning
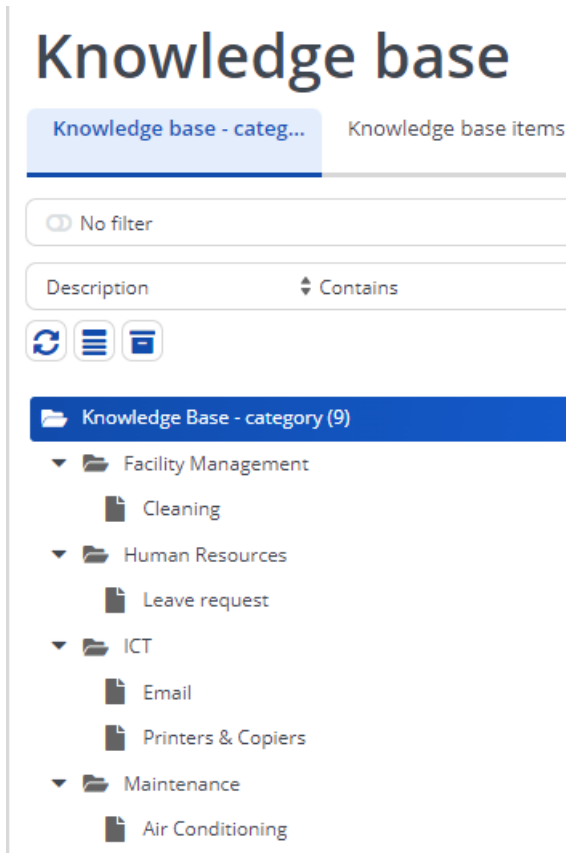
5. To create a sub-category, select the main category and click Add sub. Then complete the fields as described earlier.

6. Descend to the Knowledge base items selection level. Select an existing knowledge base item. In the Category field, select the category to which this knowledge base item belongs.

7. Click Save.

You have linked the knowledge base item to a category.

Adding a knowledge base item

Knowledge base items are property set dependent. This means that if you add a knowledge base item while working in one property set and then add the same knowledge base item while working in another property set, modifying or deleting the knowledge base item from within one property set will have no effect on the knowledge base item in the other property set.

To add a Knowledge base item

Procedure

1. Go to Knowledge base > Knowledge base items.

The elements section displays the existing Knowledge base items.

2. From the action menu, select Add.

3. Complete the fields in the data panel.

   For more information on the available fields, refer to Knowledge base item fields.

4. Save your Knowledge base item data.

Immediately after saving a Knowledge base item, all text you have entered in the **Symptom**, **Problem** and **Solution** fields is indexed and saved, which means the Knowledge base item immediately becomes available to other users.

If you have the required authorization, you can specify which key words should be excluded when indexing. For more information, see Adding excluded key words.

⚠️ If you delete multiple Knowledge base items from the database, you are recommended to manually re-index the Knowledge base to prevent performance problems. You can do so by clicking the **Re-index Knowledge base** icon on the toolbar.

On the **Knowledge base items** selection step, you can enter the data for a Knowledge base item.

For a description of these fields, refer to Knowledge base item fields.

Adding excluded key words

Immediately after saving a Knowledge base item, all text you have entered in the **Symptom**, **Problem** and **Solution** fields is indexed and saved in the Knowledge base. You can specify which key words should be excluded from indexing.

Certain trivial words, such as articles, prepositions and the like, can be excluded from the Knowledge base search criteria. Excluded words are not indexed.

To add excluded key words

Procedure

1. Go to Knowledge base > Knowledge base item > Excluded key words.

The elements section displays the existing excluded key words. The list of excluded key words is sorted alphabetically, irrespective of the language.

2. In the action menu, click Add.

3. In the Ignore word field, enter a word that you want to exclude from Knowledge base searches.

4. Click Save.
   Repeat the above steps for all words you want to exclude from Knowledge base searches.

5. After building a list of excluded key words, select the Re-index Knowledge base toolbar button to re-index the Knowledge base. This will improve Knowledge base performance.

Linking digital documents

You can link a digital document with additional information to a Knowledge base item.

To link digital documents

Procedure

1. Go to Knowledge base > Knowledge base items and in the element list, select the Knowledge base item to which you want to add a digital document.
2. Descend to Details > Documents.
3. On the action menu, click Add.
4. Complete the fields in the General section.
5. In the File name field, click the **Select file** button.

The **Open** **dialog box appears.**

6. Select the file that you want to link to the Knowledge Base item.

The file path id displayed in the File name field.

7. Click Save.

You have linked a digital document to the selected Knowledge base item. Repeat these steps for any other documents you may want to link.

Linking orders to a knowledge base item

You can link several orders that are already added to a knowledge base item. This has the advantage that you can then see which incidents are related to a single knowledgebase item.

If the problem described in the knowledgebase item is solved, you can then assess which related incidents can be closed accordingly.

Procedure

1. Go to Knowledge base > Knowledge base item.
2. In the elements list, select the knowledge base item to which you want to link orders.
3. On the action menu, click Link orders.

   The **Link orders** dialog box appears.

4. In the Available lists, select the orders you want to link to the selected knowledge base item. Use the SHIFT key on your key board to select multiple orders.

5. Click the right arrow to move the selected orders to the In Use list.

6. Click OK to close the dialog box.

   The orders listed in In use are now linked to the selected knowledge base item.

Linking assets to a knowledge base item

You can link assets to a knowledge base item so that you can refer to the problems, symptoms, and solutions, if any, related to the linked assets.

For example, if a pump is known to be problematic and it is installed in several washing machines, the information about the problem can be stored as a knowledge base item. The knowledge base item can then be linked to the problematic asset (pump).

Procedure

1. Go to Knowledge base > Knowledge base items.

2. In the elements list, select the knowledge base item to which you want to link assets.

3. On the action menu, click Link assets.

The Link assets dialog box appears.

4. Select and move the assets from Available to In use.

Reversely, move the assets from In use to Available to remove the linked assets from the knowledge base item.

5. Click OK.

   The assets are now linked to the selected knowledge base item.

> ℹ You can view the assets that are linked to a knowledge base item by selecting a knowledge base item and then navigating to Details > Assets.

Archiving knowledge base items

You can transfer a knowledge base item to the digital archive. This may be applicable if certain information is only relevant temporarily. If you want to archive multiple Knowledge base items in one go, you can use **Action on selection**.

> ℹ For more information, see Archiving or Action on selection(Fundamentals).

Archived Knowledge base items will no longer be visible or available to end users. You can, however, retrieve items from the archive.

Retrieving orders that are linked to knowledge base items

It may be convenient to retrieve the orders to which a selected knowledge base item applies. This can be done by creating a navigation action from **Knowledge Base** to Work Orders .

Refer to the following procedure to find out how to do this. In this procedure it is assumed that you already have configured a Knowledge base, including items that are linked to orders in the Work Orders .

Procedure

1. In Work Orders , make sure that the Knowledge base item field is made visible on the Orders selection level for the relevant business object (e.g. work order, request, requisition).

2. In Field definer , select the Orders business object (at the top level) and set it Under construction.

3. On the Details selection level, select the Knowledge base item field, enable the In selection field property and click Save.

4. Go to Business objects selection level and set the business object to Completed. Subsequently, refresh by logging out and logging in again.

5. Go to Layouts and set the relevant Knowledge base layout **Under construction**.

6. On the data panel, select the Add navigation action action.

7. Select the Add navigation action option on the action panel.

   The **Navigation action** wizard will open.

8. At step 1, select Work Orders from the list of available TSIs

9. Select the relevant fields for your knowledge base navigation action and click Next.

10. At step 2, select the Orders TSI and selection level and click Next.

11. At step 3, click Complete.

12. On the **Layouts** data panel select the untranslated navigation action.

13. On the **Navigation actions** panel at the far right, enter relevant translations for your navigation action.

14. Click **Save**.

15. Set the layout to Completed. Subsequently, refresh by logging out and logging in again.

You will now be able to use this navigation action between **Knowledge Base** and the Work Orders to retrieve the orders that are linked to individual knowledge base items.

16. In Knowledge Base, select a knowledge base item.

17. Select the navigation action to the Work Orders .

Work Orders will open, displaying the orders that are linked to the selected knowledge base item.

Knowledge Base – Field Descriptions

Knowledge base categories

Field	Description
Description	Enter the name of the knowledge base category.
Image	Upload relevant images which will be used by the **Knowledge Base** module in **Self-Service** to display images on the search page.
Image URL	Enter a URL to an image. **Knowledge Base** module uses this URL to display images on the knowledge base search page.

> ℹ The feature switch **Enable image field for Self-Service Knowledge base categories** when enabled, will pick the images from **Image** field, else from the **Image URL** field.

Knowledge Base Items - fields

Field	Description
Symptoms	Enter a description for the symptoms of a problem. For example, power cable not connected properly.
Problem	Sspecify the problem. For example, computer not starting.
Solution	Specify the solution for the problem. For example, check if there is a loose connection of the power cable.
Code	Automatically specifies a code for the Knowledge base item.
Description	Enter description for the Knowledge base item. This description is displayed in the element section.
Date entered	Automatically specifies the system date.

Field	Description
Created by	Automatically specifies the name of the user who is logged in.
Standard order	The standard request to which the Knowledge base item is linked.
	When a standard request is linked to a Knowledge base item, all fields for requests that are created on the basis of this Knowledge base item are completed on the basis of this standard request.
Specialist	Select a name of the expert in the field of the relevant Knowledge base item.
	The list includes individuals from the Personnel TSI.
Publish	This Yes/No field allows you to specify whether a Knowledge base item can be published on the Intranet via Planon Self-Service.
Transferred to archive?	This Yes/No field displays whether the relevant Knowledge base item has been transferred to the archive or not.
	The field is automatically updated.
	For more information on archiving Knowledge base items, see Archiving knowledge base items.
Applied	Planon ProCenter automatically counts how many times a particular solution has been applied.
	Each time an order(s)/request(s) is linked to the Knowledge base item, this number is incremented.

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