4.5.1

Knowledge Base

1. Policy Purpose and Scope

The purpose of this policy is to provide a consistent framework and structure for the creation of Knowledge Base (KB) articles, adhering to a standard for information provided to customers on the use and function of PhotoBiz products.

2. Roles and Responsibilities

Knowledge Base content and updates will be administered primarily by the assigned Marketing Tteam member. Content may be provided by any employee of PhotoBiz, and will be curated by the Marketing Tteam member under the direction of the Marketing Manager. Content provided by Support will be eligible for points under Support's P2 system, using the point value guidelines set forth below. Marketing will confirm completion of eligible content; however the actual assignment of point values and confirmation of item eligibility will be at the discretion of the Support Team Lead.

3. Policy

3.1 New Articles

3.1.1 Creating New Articles

In general, new articles are created in the following situations:

1. When a new product is released requiring a Knowledge Base (KB) article.

2. When it is determined that information exists that will be helpful to our customers, that is not ~~covered~~ already covered by an existing article.

Any employee of PhotoBiz may submit an article for the KB. ~~A~~rticles submitted for the KB are subject to editing in order to ensure adherence to company standards, style, and/or to maintain accuracy. To submit an article, please follow these steps:

1. All articles must be ~~on~~ through Google Drive. There are two ways to get ~~the~~ an article onto Google Drive:

    ~~2.~~a.   Create the article ~~either~~ directly in Google Drive as a Google Document, ~~or in Word, Wordpad or any other text editor or word processing program. Other acceptable examples are Notepad ++, Text Wrangler, etc. TextEdit and Notepad are also acceptable but may not provide the necessary functionality for articles that require screenshots, etc.~~

a. Upload a document to Google Drive. If the article was created outside of Google Drive (e.g., ~~in~~ Word~~or in Word~~, Wordpad, ~~~~Notepad ++, Text Wrangler or any other text editor or word processing program)~~. Other acceptable examples are Notepad ++, Text Wrangler, etc. TextEdit and Notepad are also acceptable but may not provide the necessary functionality for articles that require screenshots, etc.~~

~~3.~~b. ~~, etc, upload the document to Google Drive~~ convert it to a Google Document during upload.

~~4.~~2. Once the document is in Google Drive, ensure the article permissions are set to allow anyone at PhotoBiz to view and edit.

Add the link to the Google Drive document~~article~~ to the "Created Articles" tab of the Knowledge Base Articles Tracking spreadsheet. The link to this spreadsheet can be found on the BizPortal under the Quick Links sidebar.

3.

    a. (https://docs.google.com/a/photobiz.com/spreadsheet/ccc?key=0AoX9I2Z8qvZddE1nQzhGdEpTWGR6RUk0OEcxblFHUWc#gid=2)

3.1.2 New Article Guidelines

In order to be eligible for addition to the KB, the following guidelines and standards should be used when submitting articles:

1. Articles should provide full instructions to the reader for all steps in the process. For example, an article about how to update a Portfolio Site page should begin by instructing the customer to access the appropriate control panel, then the appropriate page, etc. all the way to the article objective.

2. Articles should provide clear step-by-step instructions. The idea here is that a customer ~~who is just getting started~~with no experience can open the article and follow the steps to accomplish the article's instructions. A good way to ensure all steps are included ~~do this~~ is to open your demo account and then proceed through the steps yourself, documenting each and every action you take.

3. Lingo or abbreviations should generally be avoided. In instances where it is necessary to include them in order to reflect their usage in the Control Panel, such instances should include an explanation ~~either via annotation or~~ in parentheses. If a particular abbreviation will be used throughout the article, only the first instance needs to be annotated. For example, Knowledge Base (KB).

4. Articles should be spellchecked and proofread prior to submission.

5. Articles should require no to minimal editing. Articles that require substantial editing may be sent back to the author for rewrite.

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5.6.   Updates to existing articles should not be submitted as new. For updates to existing articles, see section 3.2.1 below.

6.   If you are eligible to receive P2 point credit for the article, make sure to follow the procedure outlined in 3.4.1 for creating a ticket to track your points.
7.

In order to be eligible for addition to the KB, the following guidelines and standards should be used when submitting screenshots for KB articles:

1. Screenshot width should ideally be at or under 850 pixels wide. In some instances screenshots up to 1,000px wide can be used, but may cause issues when viewed on~~ith~~ smaller screens. There is no minimum ~~length~~height for the images, but in general screenshots ~~longer~~taller than 700px should be avoided.

7. ~~Avoid~~ Do not us~~ing~~e screenshots with sensitive information, such as live customer data, live financial data, etc. If it is necessary to screenshot areas showing this type of information, ensure that any actual data is blurred out.

~~8.   Screenshot width should ideally be at or under 850px wide. In some instances screenshots up to 1000px wide can be used, but may cause issues with smaller screens. There is no minimum length, but in general screenshots longer than 700px should be avoided.~~

~~9.   Updates to existing articles should not be submitted as new. For updates to existing articles, see section 3.2.1 below.~~

10.2.   ~~If you are eligible to receive P2 point credit for the article, make sure to follow the procedure outlined in 3.4.1 for creating a ticket to track your points.~~

For examples of articles that meet these guidelines, ~~you can~~ review the following existing KB articles:

http://help.photobiz.com/kb/index.php?View=entry&EntryID=276

http://help.photobiz.com/kb/index.php?View=entry&EntryID=278

http://help.photobiz.com/kb/index.php?View=entry&EntryID=289

3.2 Article Updates

3.2.1 Notification of Needed Article Updates

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KB articles are expected to be "living documents" that ~~will~~ accurately reflect current procedures and policies. As information evolves (both ours, and that of companies we provide links to within the KB, such as domain registrars, etc.), the KB should be updated to reflect the current procedures.

When ~~it is noticed by~~ a PhotoBiz employee notices, either from direct observation or due to customer feedback that a KB article is in need of update the employee should notify Marketing via the use of the Rating Feedback function of the KB.

To submit a Rating Comment:

1. Scroll to the bottom of the article in question on the KB, and locate the text reading "This article was: Helpful|Not helpful".

2. Click on "Not helpful". This will open a comment box. In the comment box, indicate in your comment what part of the article requires updating ~~to be current~~. If the correct information is known, it should be ~~included~~ detailed in the comment.

3. Please include your name at the end of your comment. This is optional, but important for employees who are eligible to receive point credit for providing update information to Marketing on KB articles. Credit cannot be awarded in cases where the submitting employee's name is not provided.

4. Click "Send".

5. Once the comment has been sent, it will be added to an update queue automatically within the KB control panel. Marketing will then update the article working from this queue.

6. If you are eligible to receive P2 point credit for the update, make sure to follow the procedure outlined in 3.4.1 for creating a ticket to track your points.

3.2.2 Article Update Guidelines

Article updates should follow the same general guidelines as new articles in terms of standards.

1. Updates must clearly indicate in the rating comment which piece of information in the existing article needs ~~change~~updating. If the correct information is not known, that fact must be indicated. If the information is known, it is preferred that the information be included in detail.

2. Updates should not be submitted as new articles unless the entire article requires rewriting in order to provide adequate update. If you are uncertain whether the entire article requires rewriting, check with the Support Team Lead or Marketing.

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3. If you are eligible to receive P2 point credit for the update, make sure to follow the procedure outlined in 3.4.1 for creating a ticket to track your points.

3.3 Article Completion Credit

3.3.1 Eligible Articles

Some employees are eligible for reward points for writing new or providing update feedback on KB articles. Those articles and the point values are as follows:

- Reporting an article in need of update, without including the update information: = .33 points. (Note: the update information should only be left out in situations where the correct information is not known.)

- Reporting an article in need of update, and including the detailed update information: = 2 points.

- Writing the framework for a new KB article without creating the action article (i.e.g.,: sending information that provides the details, but does not create the article or screenshots) = 4 points.

- Writing a new KB article that requires no to minimal editing, without including screenshots =: 10 points.

- Writing a new KB article that requires no to minimal editing and includes screenshots =: 15 points.

Note: Writing out a new article for articles that only require updating is not eligible for points. Article updates should always use the rating comment system.

3.4 Documentation

3.4.1 Ticket System

In order to obtain documentation of point awards for KB articles, the following process should be observed.

1. Create a new ticket under your Demo account. Use the following information under Ticket Details:

    - Assigned to: Marketing – Agent: Joanne K (Marketing Associate responsible for KB)
    - Module/Subject: Marketing Question/Request – General Question
    - Status: New (Not Open)
    - Priority: Medium

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2. In your comments, include sufficient information about the article so that the Support Team Lead can verify your points. If it is a new article, include a link to the Google Doc you created. If it is an update to an existing KB article, include a link to the KB article. This is in addition to adding the new document link to the tracking spreadsheet, and/or flagging the article using the Rating Comment system.

3. One the article has been added or updated, the ticket notes will be updated with the article link, and the ticket will be sent back to you confirming. This is your verification for the purpose of points.

Note: Remember to create a ticket so you can receive your points!