Peregrine

# Get-Answers

# User Guide

PART NO: GET-ANS-3.0-01013-00195

Peregrine SYSTEMS

If you have comments or suggestions about this documentation, please send e-mail to Peregrine Systems Customer Support.

This edition applies to version 3.0 of the licensed program.

Peregrine Systems, Inc.
Worldwide Corporate Campus and Executive Briefing Center
3611 Valley Centre Drive San Diego, CA 92130
Tel 800.638.5231 or 858.481.5000
Fax 858.481.1751
www.peregrine.com

# Table of Contents

# Introducing Get-Answers

Get-Answers is a Knowledge Management web-based application used to capture knowledge. Using Get-Answers, you can increase the quality and accuracy of information used by people in your company to get their jobs done.

This preface includes the following topics:


- *Organization of this guide* on page 6.
- *Packing list* on page 6.
- *Compatability matrix* on page 7.
- *Contacting customer support* on page 8.

# Organization of this guide

This guide includes the following chapters:



# Related Documentation

In addition to this guide, *Get-Answers User Guide*, the following documentation is available for the Get-Answers product.

| This manual... | Provides information on... |
|---|---|
| *Installation Guide* | Installing and configuring Get-Answers. |
| *Administration Guide* | Creating and managing users, and customizing features in Get-Answers. |
| *Workflow Guide* | Using the Triage and Editorial workflows to publish, transfer, edit, and delete documents. |

# Packing list

The complete package includes:

- The Get-Answers Web application CD, the Get-Answers search engine CD, the Business Intelligence Portal CD, and 2 Business Objects server CDs.

- Product documentation including the Get-Answers Installation Guide, this Get-Answers User Guide, the Get-Answers Administration Guide, and the Get-Answers Workflow Guide.
- The Customer Support Welcome letter, with Customer Support contact details. You need to contact them to obtain the appropriate authorization code (serial number) required for installing Get-Answers.

# Compatability matrix

The following software versions are compatible with Get-Answers.

### Operating Systems

Microsoft Windows NT 4.0 Server
Microsoft Windows NT 4.0 Workstation
Microsoft Windows 2000 Server
Microsoft Windows 2000 Professional

### Browsers

Microsoft Internet Explorer 5.0 or later
Netscape Navigator 6.2 or later

### Web Servers

Microsoft IIS Server 4.0 or 5.0
Apache 1.3

### Application Servers

Tomcat 3.2.4
WebSphere 4.0.1
WebLogic 6.1 SP1
JRun 3.1

### Java Runtime Environment

JDK 1.3.1 with Tomcat
JRE 1.3.1

### Databases

Oracle 8.1.7

### Processor

Pentium 400 mhz or faster

### RAM

256MB RAM minimum on web server, 512MB recommended
128MB RAM minimum on RetrievalWare server

### Disk Space

100MB minimum disk space on web server
300MB minimum disk space on RetrievalWare server
615MB minimum disk space on the Oracle server

# Contacting customer support

For further information and assistance with Get-Answers, contact Peregrine Systems' Customer Support at: *http://support.peregrine.com*.

You will need the current login and password to access the web page.

Alternatively, you can contact one of the Peregrine Systems Customer Support offices listed below.

**Note:** Only the European Customer Support staff is multilingual and can provide technical support to customers in their native language.

## Corporate Headquarters

| | |
|---|---|
| Address: | Peregrine Systems, Inc.<br>Attn: Customer Support<br>3611 Valley Centre Drive<br>San Diego, CA 92130 |
| Telephone: | +(1) (858) 794-7402 |
| Fax: | +(1) (858) 480-3928 |
| Email: | support@peregrine.com |

## North and South America

| | |
|---|---|
| Telephone: | (1) (800) 960-9998 (within US and Canada only, toll free)<br><br>+(1) (858) 794-7402 (Mexico, Central America, and South America) |
| Fax: | +(1) (858) 480-3928 |
| Email: | support@peregrine.com |

## Europe, Asia/Pacific, Africa

Visit the Peregrine Systems web site at:
http://sdweb02.peregrine.com/prgn_corp_ap/Support/pstCustomerSupport.cfm
for support contact information for your country and product.

You can also contact the Corporate Headquarters using the information provided above.

# 1 Searching in Get-Answers

CHAPTER

Using the Search option, you can perform basic and advanced searches on a set of documents in Get-Answers. A basic search consists of entering a natural language query that will display a “hit list” of documents related to the query. An advanced search provides a number of options to narrow your search. Advanced search options include:

- Changing the search type
- Setting the expansion level
- Searching on Metadata

In addition, Get-Answers provides several other options to help make the searches more relevant to your needs.

Topics in this chapter include:


- *Performing a basic search* on page 13.
- *Performing a Boolean query* on page 13.
- *Performing a concept search* on page 14.
- *Performing a metadata query* on page 15.
- *Using pattern matching in a search* on page 16.
- *Performing a recurrent query* on page 16.

# Performing a basic search

**To perform a basic search:**

- In the Search screen, enter your text in the field provided and click Search to begin the search.
- You can select the desired document or click the Details link for any document to obtain information on that document, such as the title, summary, version number, type, and other detailed information.

# Advanced search options

Get-Answers provides several different types of options when performing an advanced search to obtain the information you are looking for. For example, you can change the type of search you want to use, you can search on a document's metadata (such as Title, Version Number, and Creation Date), and you can narrow a document search by selecting nodes in the Table of Contents.

## Performing a Boolean query

You can use Boolean operators to improve the power of a search. You will need to include the terms where appropriate when you enter your text in the Query field on the Advanced Search Query field. When using Boolean operators, only exact words and their tense or singular/plural variants are used in the query.

The terms you can choose from include:

- AND (or the symbol '&') — e.g. "jury AND duty" returns documents with both words, not documents with only one word.
- OR (or the symbol '|') — e.g. "jury OR duty" returns documents containing either or both words.
- NOT (or the symbol '^') — e.g. "jury AND duty NOT form" returns documents containing both the words "jury" and "duty" that do not contain the word "form."

- WITHIN N — e.g. “jury AND duty WITHIN 2” returns documents containing both words, where the words are within two words of each other in a document, not counting stop words, and in either order.
- ADJ N — e.g. “jury AND duty ADJ 2” returns documents containing both words, where the words are within two words of each other in the document, not counting stop words, where “jury” precedes “duty.”

### To perform a Boolean query:

1. In the Advanced Search screen, enter your question using the desired Boolean terms listed above.
2. Select **Boolean** as the Search Type.
3. Select **Exact Matches (level 1)** as the Expansion Level.
4. Select the desired **Category** from the Scope of Search frame.
5. Determine if you want to search on the **Creation Date** or **Expiration Date** of a document.
6. Click **Search** to begin the search.

## Performing a concept search

### To perform a concept (default) search:

1. Enter your question in the Advanced Search screen.
2. Select **Concept Search** as the Search Type.
3. In the Expansion Level pull-down menu, determine the level of semantic expansion you want. For the examples provided, assume the word “catch” is the query. Choose from the following:
   a. Exact matches (e.g. catch, catches)
   b. Simple variations (e.g. caught)
   c. Most strongly related concepts (e.g. capture, trap)
   d. Strongly related concepts (e.g. ensnare, nab, seize)
   e. Weakly related concepts (e.g. understand, doorstop, bag)
4. Select the desired **Category** from the Scope of Search frame.
5. Determine if you want to search on the **Creation Date** or **Expiration Date** of a document.
6. Click **Search** to begin the search.

## Performing a metadata query

You can choose from two methods to perform queries on document metadata. One method is to search for documents by specifying values for document metadata. Only documents with metadata matching the selection criterion will be listed in the resulting hit list. The following metadata fields are provided by Get-Answers:

- Title
- Summary
- Version Number
- Type
- Format
- File Name
- File Size
- Import/Creation Date
- Editorial Status

The second method is to specify Boolean operators between metadata types. For example, the Owner of an Ownership Team might want to know what documents (owned by the team) from one particular domain associated with the Ownership Team need attention over the next few days. The Owner can issue a query to view all published documents from one specific domain associated with the Ownership Team that are set to expire within the next ten days.

### To perform a metadata query:

1. In the Advanced Search screen, choose one of the following options:
   a. Enter your question in the text box.
   b. To specify Boolean operators between metatdata types (using the example above), your query would look like this: **expiration date less than or equal to today's date plus ten days AND domain = specified domain**.
2. Select the desired Search Type. If you are using Boolean operators, select **Boolean** as the Search Type.
3. In the Expansion Level pull-down menu, determine the level of semantic expansion you want. For the examples provided, assume the word "catch" is the query. Choose from the following:
   a. Exact matches (e.g. catch, catches)

b Simple variations (e.g. caught)

c Most strongly related concepts (e.g. capture, trap)

d Strongly related concepts (e.g. ensnare, nab, seize)

e Weakly related concepts (e.g. understand, doorstop, bag)

4 Enter the metatdata information you want to search for in the fields provided under Document Metadata.

5 Select the desired **Category** from the Scope of Search frame.

6 Determine if you want to search on the **Creation Date** or **Expiration Date** of a document.

7 Click **Search** to begin the search.

A hit list appears with all of the documents that contain the information you entered.

## Using pattern matching in a search

Use pattern matching to overcome misspellings (human error), problems introduced through the creation of documents using optical character recognition software (scanning), and searches for terms with difficult spellings (proper names, etc.).

You can use pattern matching in two different ways. First, you can indicate specific words to use pattern matching against in any query (in the Basic or Advanced Search screens). To do this, you need to precede the specific words with a “tilde” (~) character in the Query field. Second, you can choose to have all words in a query subjected to pattern matching by selecting Pattern Matching as the Search Type on the Advanced Search page.

## Performing a recurrent query

If you have already submitted a query and received a hit list as the result, you can narrow the hit list by submitting another query. The second query will only return hits on documents that appeared in the first hit list and that are related to the second query.

For example, if you submit the query “jury duty,” the resulting hit list would contain all of the documents related to jury duty. You could then choose to narrow the scope of the hit list by submitting the query “forms” against the “jury duty” hit list. The resulting hit list would contain all of the documents related to jury duty that also contain the concept “forms”.

## Performing a compound query

A compound query combines a natural language query with advanced search options such as queries on metadata and context-based queries.

For information on queries on metadata, see *Performing a metadata query* on page 15. For information on context-based queries, see *Submitting comments on a document* on page 18.

## Using exact phrase matching

You can specify an exact phrase to search for by surrounding the phrase in quotation marks in the text box. For example, the query "white elephant" would return a list of documents containing that exact phrase. The hit list would not include documents containing the *concepts* "white" (and "pale", "Caucasian", etc.) and "elephant" (and "pachyderm", "Dumbo", etc.).

## Using grouped terms

Use grouped terms to semantically group linked terms in the query together. Get-Answers returns documents related to any of the terms in the group, as well as the rest of the terms in the query, in the hit list. You can specify grouped terms by surrounding the set of terms with parentheses in the question text box on the Advanced Search screen.

For example, the query "(chemical gas mustard) attack" will return hits on any documents containing any of the concepts in the set "chemical gas mustard" and the concept "attack".

**Note:** This is useful when the words in a grouped set are not already semantically related in the dictionary (as in the example). If the words are already related, you will basically get the same results as an ungrouped natural language query using the same words. To the system, the query "(dog canine hound) attack" is not much different from the query "dog attack".

# Browsing categories

Using a table of contents, you can browse all of the documents to which you have access. Selecting a node in the table of contents will cause a list of appropriate documents to appear. When you select one of the documents, it will open in the browser.

### To browse categories:

1. Click **Browse Categories** in the menu options.
2. Select the desired domain and then the category within the domain.
3. Select one of the documents and it will open in the browser.
4. Click the **Details** link for additional information about a document.

To enter feedback on a document, see *Submitting comments on a document* on page 18.

# Submitting comments on a document

You can provide suggestions for improving the documents you use in Get-Answers.

### To submit comments on a document:

1. In Get-Answers, click **Search** in the menu options.
2. After locating the desired document, click the **Details** link.
3. Answer the question asking if the document was useful to you.
4. In the text box, enter your comments for improving the document.
5. Click **Submit Feedback** to submit the comments.

   Owners can then access and review the comments submitted under the Manage Documents activity.

# 2 CHAPTER Working with Documents

Get-Answers can index and search for documents created using the Get-Answers Authoring tool and documents created using other tools. Get-Answers supports the following types of documents:

- Microsoft Office Suite
- Visio (versions 4 or 5)
- Adobe Acrobat (PDF files)
- Plain text (TXT files)
- Rich text (RTF files)
- HTML
- XML

You can import documents in other formats, but they will not be accessible though the Search option. However, you will see these documents in the table of contents and various workflow capabilities.

Topics in this chapter include:

- *Submitting multiple documents for publication* on page 25.

# Document IDs

Each document managed by Get-Answers has a unique Document ID. No two documents managed by an instance of Get-Answers will share the same Document ID. Each time you open Get-Answers, a single, globally unique ID (or GUID) is associated with it. The combination of the system GUID and the Document ID uniquely identify documents across Get-Answers installations.

The Document ID for a Get-Answers document includes a digit used to verify that the Document ID corresponds to a Get-Answers document. The digit can be used to quickly reject requests for documents not managed by Get-Answers.

# Links

Get-Answers will not modify native documents. The point of access to documents managed by Get-Answers is through your web browser. Therefore, any links within native documents will only continue to work if your web browser can follow them.

Get-Answers supports a URL format that provides the ability to reference a document managed by the system. If a link is followed with Get-Answers (from one document viewed in Get-Answers to another document managed by Get-Answers), the target document will appear in your browser seamlessly.

If a link is accessed from a document or web page outside of Get-Answers, two interactions are possible. If the target document is accessible to "anonymous" users, then Get-Answers opens in your browser with the target document displayed in the main document pane. If the target document is not accessible to "anonymous" users, a login screen opens. Depending on the login you enter, one of three outcomes is possible:

1. If you enter a valid login and have access to the target document, Get-Answers opens in your browser. The target document is displayed in the main document pane.
2. If you enter a valid login, but do not have access to the target document, Get-Answers opens in your browser, but with a "permission denied" message in the main document pane.

3 If your login attempt fails, an error message displays in your browser.

# Managing documents

Owners can access a Table of Contents of all documents managed by the Document Ownership Teams in which they are an Owner. Owners can do the following to manage documents:

- View a document
- View the detail information for a document
- Retire a document
- Place a document into an editorial workflow

Up to three copies of a document can exist at any time. The copies include:

- The published copy
- A working copy
- A copy currently under revision (actively being edited)

In general, the lifecycle of a document includes the following stages:

- A document is usually in a published state. This means anyone with access to the Domains in which the document is published can access the document.
- If a document needs revisions by its Ownership Team, a working copy is created. The published copy continues to exist in parallel with the working copy.
- When a Member of a document's Ownership Team checks out a working copy for editing, a copy under revision is created. When the Member finishes making changes to the document, the revised copy replaces the working copy and the revised copy is deleted.
- When a working copy is republished, the published copy is replaced with the working copy and the working copy is deleted.
- Finally, when a published document is retired, the published copy is deleted and the document is no longer accessible to the system.

## Reviewing document comments

When viewing the details of a document, owners can access and review all comments submitted for the documents they are responsible for.

### To review document comments:

1. Click **Manage Documents** in the menu options.
2. Select the desired domain and category.
3. After locating the desired document, click the **Details** link. You can review all comments submitted on a document.
4. After the comments have been reviewed and any changes have been made, owners can delete the comments by clicking the **Delete** link.

## Modifying a document

You can modify a document by creating a new workflow for the document.

### To modify a document:

1. Click **Manage Documents** in the menu options.
2. Select the desired domain and category.
3. Click **Modify** for the desired document.
4. Click **Proceed** to create a new workflow for the document.

   The document has been submitted to Workflow. For information on using Workflow, see *Using the Worklist* in the *Get-Answers Workflow Guide*.

## Transferring a document

You can transfer a document to a new document ownership team.

### To transfer a document:

1. Click **Manage Documents** in the menu options.
2. Select the desired domain and category.
3. Click **Transfer** for the desired document.
4. Select the Document Team you want to transfer the document to from the menu.
5. Click **Transfer**.

# Retiring a document

You can retire a document so it is no longer accessible by Get-Answers.

### To retire a document:

1. Click **Manage Documents** in the menu options.
2. Select the desired domain and category.
3. Click **Retire** for the document you want to retire.
4. Click the **Retire** link at the bottom of the document attributes to confirm the document removal. The document is then removed.

# Submitting a document for publication

Anyone can submit a document for publication consideration. It is important to note that once you submit a document, it is not immediately published. First, the Ownership Team of the Domain you chose must review the documents submitted and determine which documents will be published.

### To submit a document:

1. In Get-Answers, click **Contribute New Document** in the menu options.
2. Click the plus icon to select and upload the document file. The file name will appear between the square brackets.

   **Note:** The maximum file size you can upload is 4 megabytes (or 4000KB).

3. Select the Domain where you want the document copied for publication consideration.
4. Enter information such as the document title, summary, version number, type, and format. This information is useful when performing an advanced search.
5. Click **Submit Document**.

The document will be available in Workflow for publication consideration.

For information on documents in Workflow, see *Using the Worklist* in the *Get-Answers Workflow Guide*.

# Submitting multiple documents for publication

Owners can submit multiple documents that reside on the server at one time.

### To submit multiple documents:

1. First, move the documents you want to publish to the \getanswers\docs directory on the Get-It server.
2. In Get-Answers, click **Submit Server Documents** in the menu options.
3. Choose the Domain Category by clicking on the desired link. After clicking on a Domain Category, the next page opens where you can fill in any common document fields.
4. Click **Submit Documents** to submit all new documents for immediate publication.

# 3 CHAPTER Authoring in Get-Answers

Get-Answers provides the ability to create and edit new documents using a web browser. Using the Authoring menu option, you will choose a Document Type that consists of a template specifying the number, labeling, and layout of the entry boxes on the web-based form used to create the new document. The RTF Editor you use lets you choose editing features such as:

- Bookmarks
- Fonts
- Headings
- HTML
- Hyperlinks
- Images
- Spell Check
- Tables

Topics in this chapter include:

# Creating a new document

You can add new documents to Get-Answers using the Authoring menu option.

### To create a new document:

1. In Get-Answers, click the **Authoring** link.
2. Select the type of document you want to add from the Document Type menu. You can choose from the following:
   a. Error Message/Cause — Description of an error message, steps taken before receiving the error message, and a work-around for the error
   b. How To — Description of a question and corresponding answer
   c. Problem/Solution — Description of a problem and corresponding solution
   d. Reference — Description of additional information that may be helpful
3. Enter a name for the new document in the Title field.
4. In the Summary field, enter a description of the document's purpose.
5. You can select the document ownership team for the document in the Document Team field.
6. Select the date you want the document to expire in the Expiration Date field. You can use the drop-down options or click the calendar icon to choose the desired date.
7. Depending on what Document Type you select, you will need to fill in different fields, but they all contain an Edit link. When you click any of the Edit links, the RTF editor opens for you to format the text you enter.

   For more information on the RTF editor, see *Using the RTF editor* on page 30.

8. You can reference images in the document text and attach those images by clicking the plus icon next to **Upload supporting images**.
9. Browse for the file you want to attach and click **OK**.
10. Click **Submit Document** to add the new document to the file server and to Workflow.

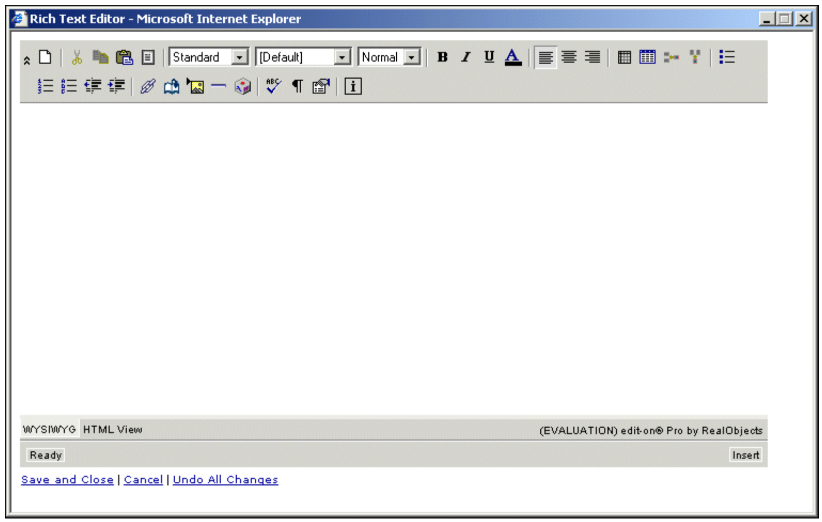
For example, suppose you created a directory on your file server called C:\GetAnswers Documents. An author submits a new document using the Error Message document type and designates the GetAnswers Team as the target document team. Then the file name would be "errormsg_1234.xml." The errormsg prefix comes from the document type and the numerical suffix is the document's ID in the database. The file will be stored in the C:\GetAnswers Documents\GetAnswers Team directory.

The document has also been sent to the Triage Workflow for review and potential publication. For information on using Workflow, see *Using the Worklist* in the *Get-Answers Workflow Guide*.

# Using the RTF editor

Use the RTF editor to format the content of a new document.

1. After selecting the desired Document Type and filling in the form's fields, click an **Edit** link on the form to open the RTF editor.
2. Click **Yes** to load the RTF editor.




3. In the RTF editor, use the tools provided to create the desired content.
4. Click **Save** and **Close** when you finish creating the document content.

   **Note:** You can switch between WYSIWYG and HTML views of the document as you are creating the content.

# 4 CHAPTER Using Best Practices

This chapter provides examples to show you how you can implement Get-Answers at your company.

Topics in this chapter include:

# Scenarios

The following scenarios illustrate how to use Domains and Ownership Teams to organize employees and the information they have access to effectively.

Domains contain published documents. Each domain is managed by one Ownership Team. Ownership Teams consist of groups of people managing documents. There are four roles within an Ownership Team. Roles include Author, Member, Owner, and Reviewer. There is also a Get-Answers Administrator role.

## Get-Answers installation

1. When Get-Answers is first installed, a user is created with the Get-Answers Administrator role.
2. The Administrator creates a number of domains. For each domain or set of related domains, an Ownership Team is created. A user is assigned the Owner role for each Ownership Team. Note: The Owner role might be shared by one individual for related Ownership Teams, but typically not.
3. Each Ownership Team Owner populates the domains owned by the Ownership Teams with the initial documents (if any exist).
4. Each Ownership Team Owner populates the Ownership Team with users or groups of users, assigning Ownership Team roles (such as Owner, Reviewer, etc.) to the users or groups of users as appropriate.

## A new employee joins the company

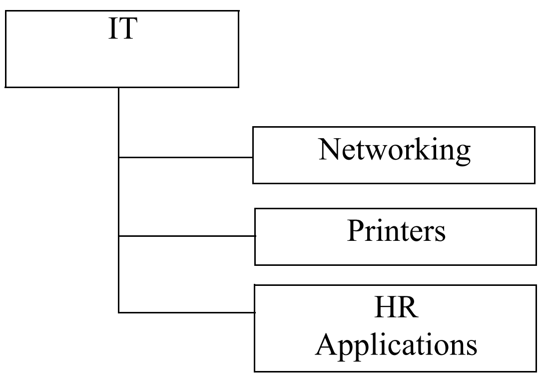
1. The Get-Answers Administrator creates a new user account for the new employee and assigns the user to the appropriate groups of users.
2. The new employee's manager sends a request to all of the appropriate Ownership Teams, asking for permission for the new employee to read documents in domains owned by the Ownership Teams.
3. The Ownership Team Owners decide whether to admit the new employee into the requested domain. If the new employee is granted access, the new employee is added to the list of domain members for the selected domain.

## A new domain needs to be created

1. An Ownership Team Owner realizes a need for a new domain managed by the Ownership Team. The Ownership Team Owner sends a request for a new domain to the Get-Answers Administrator.
2. The Get-Answers Administrator creates the new domain, assigning the Ownership Team of the Owner who made the request as the Owner of the new domain.

# Example

The following example describes an IT department organized into different groups of people.




The IT department has a set of people who maintain general IT knowledge and teams of experts who maintain knowledge about networking, printers, and HR-specific applications.

Suppose the IT department wants to control access to information based not only on the content, but also on the role of the accessing user. The roles the IT department needs to know about with regard to access control include:

1. End User — Employees throughout the company fit into this category and have access to general knowledge, such as how-to guides.
2. Help Desk Level 1 — These employees are the first line of customer service and need access to even more detailed information than general end users.

3 Help Desk Level 2 — These are seasoned expert help desk operators who have access to even more detailed information. Their experience in the field gives them the tools they need to use more detailed information effectively, whereas the information might be beyond the understanding of Level 1 help desk operators.

4 Administrator — These employees are system administrators for the various applications and systems supported by the department. They are the most knowledgeable IT staff members and need access to all IT-related information.

Because there are two areas where you can break information down (subject matter and user experience), the IT department wants to organize documents into one or more cells in the following matrix.

| | End User | Help Desk L1 | Help Desk L2 | Administrator |
|---|---|---|---|---|
| General | | | | |
| Networking | | | | |
| Printers | | | | |
| HR Apps | | | | |

Example 1: The Administration Guide for one of the HR applications, which also contains specific requirements on the network underlying the application might be placed into the following matrix cells:

| | End User | Help Desk L1 | Help Desk L2 | Administrator |
|---|---|---|---|---|
| General | | | | |
| Networking | | | | X |
| Printers | | | | |
| HR Apps | | | | X |

Example 2: A fairly detailed document about connecting printers up to the network might fall into the following matrix cells:

| | End User | Help Desk L1 | Help Desk L2 | Administrator |
|---|---|---|---|---|
| General | | | | |
| Networking | | X | X | X |
| Printers | | X | X | X |
| HR Apps | | | | |

# Suggested Get-Answers implementation

To implement the document access approach outlined above, you would create the following groups and associations between those groups.

## Domains

Create one domain for each cell in the access control matrix above.

| |
|---|
| End User (General) |
| End User (Networking) |
| End User (Printers) |
| End User (HR Apps) |
| Help Desk L1 (General) |
| Help Desk L1 (Networking) |
| Help Desk L1 (Printers) |
| Help Desk L1 (HR Apps) |
| Help Desk L2 (General) |
| Help Desk L2 (Networking) |
| Help Desk L2 (Printers) |
| Help Desk L2 (HR Apps) |
| Administrator (General) |
| Administrator (Networking) |
| Administrator (Printers) |
| Administrator (HR Apps) |

## Ownership Teams

Create one ownership team for each group in the IT department.

| |
|---|
| General |
| Networking |
| Printers |
| HR Apps |

## Domain Ownership

Assign domains to ownership teams as follows:

| | General Ownership Team | Networking Ownership Team | Printers Ownership Team | HR Apps Ownership Team |
|---|---|---|---|---|
| End User (General) | X | | | |
| End User (Networking) | | X | | |
| End User (Printers) | | | X | |
| End User (HR Apps) | | | | X |
| Help Desk L1 (General) | X | | | |
| Help Desk L1 (Networking) | | X | | |
| Help Desk L1 (Printers) | | | X | |
| Help Desk L1 (HR Apps) | | | | X |
| Help Desk L2 (General) | X | | | |
| Help Desk L2 (Networking) | | X | | |
| Help Desk L2 (Printers | | | X | |
| Help Desk L2 (HR Apps) | | | | X |

| | General Ownership Team | Networking Ownership Team | Printers Ownership Team | HR Apps Ownership Team |
|---|---|---|---|---|
| Administrator (General) | X | | | |
| Administrator (Networking) | | X | | |
| Administrator (Printers) | | | X | |
| Administrator (HR Apps) | | | | X |

## Example Users

Users occupy specific roles in the context of domains and ownership teams. The following users are described in terms of their Get-Answers roles and associated ownership teams and domains.

### Employee

This user is an employee of the company. The employee needs to be a Domain Member in the following domains:

- End User (General)
- End User (Networking)
- End User (Printers)

### HR Department employee

This user is an employee of the company in the HR department. They need access to all of the information accessible to all employees, plus information about the HR applications. This user needs to be a Domain Member in the following domains:

- End User (General)
- End User (Networking)
- End User (Printers)
- End User (HR Apps)

### Help Desk Level 1 IT Employee

This user is a Level 1 help desk operator. They field calls on a variety of subjects and need somewhat detailed information in all areas managed by the IT department. This user needs to be a Domain Member in the following domains:

- End User (General)
- End User (Networking)
- End User (Printers)
- End User (HR Apps)
- Help Desk L1 (General)
- Help Desk L1 (Networking)
- Help Desk L1 (Printers)
- Help Desk L1 (HR Apps)

Note that the user needs membership in the less specific "End User" domains because the "Help Desk L1" domains house only somewhat specific information about the various topics and this user may need a more general document to answer a question.

### System Administrator for networks

This user is a network system administrator. They need access to all information on the networks supported by the IT department, as well as general information available to all employees. To access all available information about printers, this user needs to be a Domain Member in the following domains:

- End User (Printers)
- Help Desk L1 (Printers)
- Help Desk L2 (Printers)
- Administrator (Printers)

Because the user is also an employee like any other, they need to be a Domain Member in the following domains as well:

- End User (General)
- End User (Networking)

### Knowledge Engineer in the printers group

This user is responsible for maintaining knowledge about the printers managed by the IT department. This user tracks the accuracy of knowledge about these assets, modify knowledge that has become inaccurate, and create new knowledge. They need to be an Ownership Team Owner in the Printers ownership team. Note that having a role in an ownership team implies membership in all domains owned by that ownership team. In this case, the domains include:

- End User (Printers)
- Help Desk L1 (Printers)
- Help Desk L2 (Printers)
- Administrator (Printers)

Because the user is also an employee like any other, they need to be a Domain Member in the following domains:

- End User (General)
- End User (Networking)

# 5 CHAPTER Generating Reports

Get-Answers provides several reports to help Administrators and Owners answer questions about the general usage of the program. The reports you can generate and the information they provide include:

| Report Name | Information Provided by Report |
|---|---|
| Author Effectiveness by Date | A count of the number of documents written or submitted by the specified user since the specified date. Also, includes the average usage score for those documents. |
| Documents by Author Name & Current State | A list of documents specified by the Published or Working Copy state and specified by author. |
| Documents Viewed & Downloaded by Usage Date | A list of documents that were viewed and downloaded since the specified usage date. |
| Documents with Written Feedback by Date | A list of documents containing feedback since the specified date. |
| Expired Documents | A list of expired documents up to the current date the report is run. |
| Ineffective Queries by Date | A list of natural language queries that were run against the system since the specified date that didn’t generate any useful hits. |

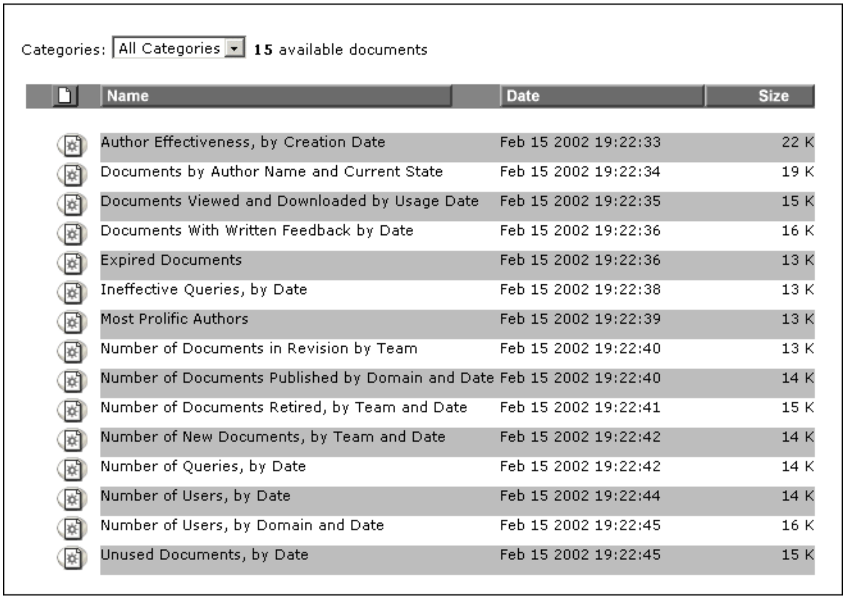
| Report Name | Information Provided by Report |
|---|---|
| Most Prolific Authors | A list of the most prolific authors based on the number of documents written or submitted. |
| Number of Documents in Revision by Team | A count of the number of documents currently being edited by the Document Ownership Team. |
| Number of Documents Published by Domain and Date | A count of the number of documents published into the specified Domain since the specified date. |
| Number of Documents Retired by Team and Date | A count of the number of documents retired from the Document Ownership Team since the specified date. |
| Number of New Documents by Team and Date | A count of the number of documents submitted to the Document Ownership Team since the specified date. |
| Number of Queries by Date | A count of the number of natural language queries that were run against the system since the specified date. |
| Number of Users by Date | A count of the number of users who have logged into the system since the specified date. |
| Number of Users by Domain and Date | A count of the number of users who have marked a document from the specified Domain as useful since the specified date. |
| Unused Documents by Date | A list of documents for which no users have recorded a positive usefulness rating since the specified date. |

# Generating reports

### To generate reports:

1 Click the **Reporting** tab in Get-Answers.

2 Select the desired report from the list of Corporate Documents.




| Name | Date | Size |
|---|---|---|
| Author Effectiveness, by Creation Date | Feb 15 2002 19:22:33 | 22 K |
| Documents by Author Name and Current State | Feb 15 2002 19:22:34 | 19 K |
| Documents Viewed and Downloaded by Usage Date | Feb 15 2002 19:22:35 | 15 K |
| Documents With Written Feedback by Date | Feb 15 2002 19:22:36 | 16 K |
| Expired Documents | Feb 15 2002 19:22:36 | 13 K |
| Ineffective Queries, by Date | Feb 15 2002 19:22:38 | 13 K |
| Most Prolific Authors | Feb 15 2002 19:22:39 | 13 K |
| Number of Documents in Revision by Team | Feb 15 2002 19:22:40 | 13 K |
| Number of Documents Published by Domain and Date | Feb 15 2002 19:22:40 | 14 K |
| Number of Documents Retired, by Team and Date | Feb 15 2002 19:22:41 | 15 K |
| Number of New Documents, by Team and Date | Feb 15 2002 19:22:42 | 14 K |
| Number of Queries, by Date | Feb 15 2002 19:22:42 | 14 K |
| Number of Users, by Date | Feb 15 2002 19:22:44 | 14 K |
| Number of Users, by Domain and Date | Feb 15 2002 19:22:45 | 16 K |
| Unused Documents, by Date | Feb 15 2002 19:22:45 | 15 K |

3 Click the **Refresh** link to obtain the most current data for the report.

4 You can change any of the report criteria and then click **Run Query** to refresh the report data.

Repeat these steps for each report you want to generate.

# Viewing a report's properties

The document (or report) properties page contains information about a report such as a description, personal categories, and keywords.

### To view a report's properties:

1 Click the **Document Properties** icon next to the report name.

The Document Properties page displays.

2 You can select a different personal category for the document and click **Apply**.

**Note:** For information on Personal Categories, see *Creating a personal category* on page 46.

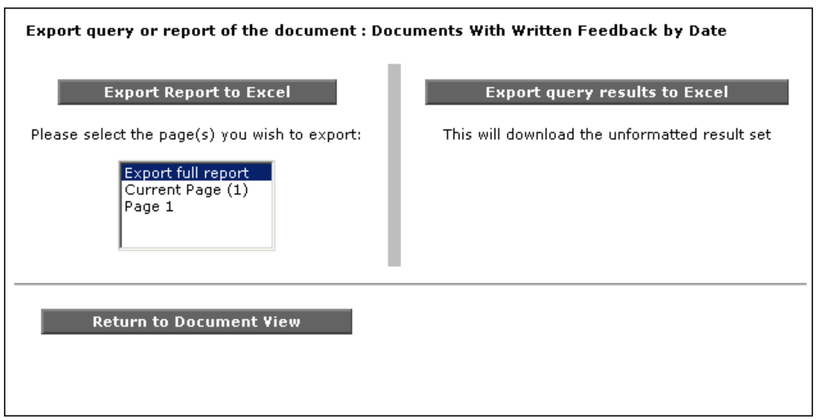
3 Click **Back to Document List** when you finish.

# Downloading a report

### To download a report:

1 Select the desired report to download from the list of Corporate Documents.

2 Click the **Download** link.




3 Click **Export to Excel** to download the report into an Excel spreadsheet. Choose whether you want to export the full report, the first page, or the current page.

Or you can click **Export query results to Excel** to download the query results into an Excel spreadsheet.

4 Click **Return to Document View** when you finish.

# Drilling down in a report

### To drill down in a report:

1 Select the desired report from the list of Corporate Documents.

2 Click the **Drill** link.

3 To narrow down your search, you can choose specific criteria from the pull-down menus at the top of the report. For example, you can select a specific Document Title, an Author Name, or a Usage Score.

**Note:** Keep in mind that the criteria can vary for the different reports.

After selecting the desired criteria, the detail information will change to reflect the request you made. You can continue to select specific criteria until you find the information you are looking for.

4 Click **End Drill** when you finish.

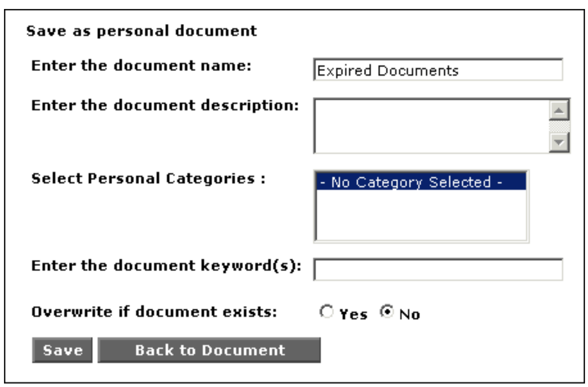
## Saving a report as a personal document

You can save a report into your Personal Documents page for your own personal use.

### To save a report as a personal document:

1 Select the desired report to save from the list of Corporate Documents.

2 Click the **Save** link.




3 You can enter a name and description for the document, the desired personal category, any keywords to help identify the document, and decide whether you want to override any existing versions of the document.

**Note:** For information on Personal Categories, see *Creating a personal category* on page 46.

4 Click **Save** to place a copy of the document in your Personal Documents page. A message appears that the document was successfully saved.

5 Click **Personal Documents** in the menu options.

The document you added appears in the list of your personal documents. You can make changes to the document and perform new queries which will be separate from the original document.

## Creating a personal category

You can create personal categories to organize reports you use everyday.

### To create a personal category:

1. Click **Personal Documents** in the menu options.
2. Click the **Categories** link at the top of the page.
3. Enter a name for the category and click **Create**.

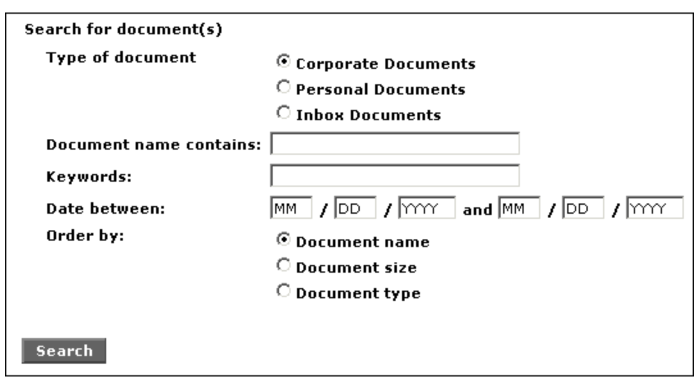
   You will see your new category in the list of Personal Categories when you save a report as a personal document and view a report's properties.
4. Click **Close** when you finish.

   **Note:** You can also update and delete categories as needed. However, Corporate and Standard are default corporate categories and must not be deleted.

## Searching for a report

### To search for a report:

1. Click the **Search** link in the menu options for the reports.




2. Use any of the following criteria to search for a report:
   - Document type - Corporate or Personal only
   - Words in the document name

- Keywords to identify the document
- Time frame the document was written
- Sort list by document name, size, or type

3 Click **Search** to locate the document.

The results of your search will display.

# Glossary

**Authoring** is the ability to create new documents and edit the content using an RTF editor.

**Capabilities** are the tasks that Members, Submitters, Readers, Reviewers, Editors, and Owners can perform. There are seven capabilities including read, create, update, revert, retire, publish, and transfer.

**Domains** contain published documents. Each domain is managed by one Ownership Team.

**Editor** is one of the four Document Ownership Team permissions. An editor has read, create, and update capabilities for any document owned by the Ownership Team. An Editor also has special responsibilities in the editorial workflow.

**Member** is one of the two Domain permissions. A member has read access to any document published in the domain.

**Metadata** consists of information stored about each document, such as file name, title, file size, document type, version number, creation date, and editorial status.

**Owner** is one of the four Document Ownership Team permissions. An owner has read, create, update, revert, retire, publish, and transfer capabilities for any document owned by the Ownership Team. An Owner also has special responsibilities in the editorial and triage workflows.

**Ownership Teams** manage documents. There are four permissions associated with an Ownership Team. They include Reader, Editor, Owner, and Reviewer.

**Reader** is one of the four Document Ownership Team permissions. A reader has read access to any document owned by the team. Readers play no role in the editorial or triage workflows.

**Reviewer** is one of the four Document Ownership Team permissions. A reviewer can read any document owned by the Ownership Team. A Reviewer also has special responsibilities in the editorial workflow.

**Roles** consist of a group of users. Permissions are given to roles and/or individual users.

**Submitter** is one of the two Domain permissions. A submitter has read access to any document published in the Domain, and can contribute new documents to the Domain.

**Workflow** consists of the lifecycle stages of each document. Up to three copies of a document can exist at any time. They include the published copy, the working copy, and the copy currently under revision.

**Working Copy** is a version of the published document in an editorial status.

# Index

## W

March 22, 2002