

TimeTrak White Paper

Knowledge Base Features in TimeTrak

Knowledge Base features in TimeTrak

One of the hardest things to do today is to consolidate an organisation's knowledge and make it available in a way that assists all team members. TimeTrak Knowledge Base is available in TimeTrak Professional and TimeTrak Mobile, meaning that users can access information while out in the field.

There are almost unlimited uses for a Knowledge Base.

A Knowledge Base can be a question and answer forum, allowing team members to share their experiences and solutions with one another. A Knowledge Base can be a repository of organised documentation, contain Sales and Marketing information, tools for those in Field and Customer Service and store HR information.

When used properly a Knowledge Base can be an excellent tool for cataloging information, enabling and increasing collaboration, managing data, and assisting in self-learning.

The purpose of this whitepaper is to demonstrate how to enable and set up a Knowledge Base in TimeTrak, how to use it in TimeTrak Professional and TimeTrak Mobile, and give real world examples of the benefits.

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Setting up a Knowledge Base

To be prepared to set up a Knowledge Base, it is a good idea to have noted down what kind of information the Knowledge Base is going to contain and how that information is ordered.

Clipbo	ard	r <u>s</u>	F	ont	Es.		Alignmer
A36	- :	× ✓	$f_{\mathcal{K}}$		_	_	
	A			в	l c	D	E
HR Know	vledge Ba	se					
Category	One		Sub Ca	teogory			
Adminis	tration						
Applicar	nt Screeni	ng					
5			Positio	n Requirem	ents		
5							
Base Rat	es						
Coaching	g Method	s and Tools					
			Self lea	arning tools			
0 Compan	y Policies						
1 Complic	ance						
2			Work P	lace Standar	rds		
3			Health	and Safety			
4 Employn	nent Law		Contra	cts			
5			Resign	ing			
6 Job Post							
7 Orientat	ion		New St	taff Person			
8			Existin	g Staff Perso	n		
9							
0							
1							

Once you have a structure in place, log in to the TimeTrak Admin Console.

Go to the Knowledge Base menu.



Click on **Add** to create a new Knowledge Base.

Give the Knowledge Base a meaningful name. This name is what the Link will show in TimeTrak Professional and TimeTrak Mobile to access the information.

Gr	oup				23
	Knowledge Base	e Group Group Permise	sions		
	Name:	HR Knowledge Base			
1	Allowed Types:	Article			-
	Categories:				
		•			
				Ok	Cancel

Set the Allow Types.

A Knowledge Base can have Articles and Questions.

Name:	HR Knowledge Base
Allowed Types:	
Categories:	(Select All)
	Article Question
	OK Cancel

- An **Article** is designed to contain a specific piece of information. Comments are allowed but often this will be disabled as the information is set and not up for discussion.
- A **Question** is designed to have answers and team members can vote on the answers until one answer is selected as the solution.

Now set up the Categories and their Sub Categories.

These are the groups for the information that is either an Article and/or Question. Click on the Plus Icon to create a Category.

Knowledge Base	Group	Group Permissions		
Name:	HR Knov	wledge Base		
Allowed Types:	Article			-
Categories:				
	•		 	

A new pop up will show with the Title of Category. Enter in the Name of the first Category.

Category	23
Name: Administration	
Sub Categories:	

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Sub Category for Administration

Stategories:

Ok Cancel

Tip: This screen looks very similar to the Knowledge Base set up screen and to the Sub Category Screen so it is **important** to read the Title of the screen to make sure you are in the correct place.

Click OK to save the Category.

A Category can be edited and deleted from the main Knowledge Base Screen.

Group				23
Knowledge Ba	ase Group	Group Permissions		
Name:	HR Kno	wledge Base		
Allowed Type	s: Article			•
Categories:				
Administrati	on			
	_			
	-00			
			Ok	Cancel

Important: If a Knowledge Base or its Categories are deleted then all references to Articles and Questions will be removed from the database and lost. Users will be warned.



A Category can have a Sub Category and that Sub Category can have a Sub Sub Category and so on. Best practice is to have three levels of Categories; this keeps the Knowledge Base screens easy to use in TimeTrak Professional and Mobile.

To add the Sub Categories keep clicking on the Plus Icon in each layer of Category.

Category Name: Applicant Screening Sub Categories:	22
Sub Category for Applicant Screening Name: Position Requirements Sub Categories:	
	Ok Cancel

Knowledge Base Permissions

Permissions for a Knowledge Base are set initially against the **Groups**.

Click on Group Permissions on the Knowledge Base set up screen and update the permissions.

Visibility allows the group's users to see the Knowledge Base and **Read Only** prevents users from adding any articles, questions or comments of their own.

Name	Visible	Read Only
Admin Profile		
Another Profile	V	
Equipment Profile	V	
Subby	V	
Testing Profile	V	

Once the Knowledge Base itself has permissions set up then further permissions can be set at the Profile level. This can result in a single user with their own visibility and access to a Knowledge Base that is different from others.

Go into the Profiles Menu Open a Profile Click on the Knowledge Base Tab to set the permissions

Visibility - allows the group's users to see the Knowledge Base **Read Only** - prevents users from adding any articles, questions or comments of their own. **Editable** – allows those users allocated to the profile to edit another users article within that Knowledge Base.

me: Admin Profile			
TimeTrak Config Alerts MYOB Exo Post & Invoice Check1, Knowledge Base Form Layout Customisations Checklists Reports Queues Users			
Name	Visible	Read Only	Editable
Hazard Register	V		
HR Knowledge Base	V		
Knowledge Base	V		

The Knowledge Base is now set up and ready for use.

TimeTrak Professional Knowledge Base

Articles and Questions are created in TimeTrak Professional within a Knowledge Base.

Log into TimeTrak Professional.

Just underneath the report selection option, a list of existing Knowledge Bases will show.

Logge	ed in as: Bridget Fairweather (<u>Switch User</u> <u>Loqout</u>)
🏝 📑 🖥 🐼 🐼 🕄 🖧 😮 🖺	[Select a Report]
Hazard Register HR Knowledge Base Knowle	dge Base Map Client Map Get Directions Tasks

Click on a Knowledge Base link to open the Knowledge Base panel.

Filters and the Categories will show in a panel on the right side of the Knowledge Base.

IR Knowledge Base		🗗 🕄 😹 🚱 (
Type search string and press enter	0	Filters
There were no articles found that match the search criteria		Favourites
		My Drafts
		Created By Me
		Subscribed
		Answered
		Unanswered
		Articles
		Questions
		Administration
		Applicant Screening
		Base Rates
		Coaching Methods and Tools
		Company Policies
		↓ Compliance
		Health and Safety
		Work Place Standards
		Employment Law
		Contracts
		Resignations

lcons:



Ask a Question

Click on the Ask Question Icon



The New Question screen will pop up.

The Details tab is the landing page.

In this screen, the Question will need a meaningful Question Title.

lew Question		
Details Attachments (0) Related Items (0)		
Question:		
Enter subject		
Categories:		
Select categories		
Description:		
Normal 🔹 Arial 🔹 (Font Size) 🔹 🗄 🗄 🗮 🗮 🗮 🗃 🖪 B I U 😪 🗃 🖬 A 🕶 💯 🔹 🔛		
✓ Allow Comments	Cause as Dash	Add this article to my favourites list
Alivia Collineits	jave as pratt	Must this article to my lavourites list
		Save Cancel

Select at least one Category to assign the Question to.

To do this, click on the Categories Field and a drop down list will appear.

Repeat this to add more than one Category.

ew Questi	on					
Details	Attachments (0)	Related Items (0)				
Question						
How mar	ny days notice to give	?				
Categorie	s:					
Compan	y Policies 😢 Employn	nent Law > Resignatio	ns 😢			
Adminis	Administration					
Applican	t Screening					
Base Ra	Base Rates					
Coachin	g Methods and Tools					
Coachin	Coaching Methods and Tools > Self Learning Tools					
Complia	nce					
Complia	nce > Health and Saf	ety				

To assign under a Sub Category, these are displayed as "[Category] > [Sub Category]".

Question:	
How many days notice to give?	
Categories:	
Company Policies 😆 Employment Law > Resignations 😂	
Administration	
Applicant Screening	
Base Rates	
Coaching Methods and Tools	
Coaching Methods and Tools > Self Learning Tools	
Compliance	
Compliance > Health and Safety	

Enter in the Description of the Question.

There is some basic formatting tools for the content of the Question.

New Question	x
Details Attachments (0) Related Items (0)	
Details Attachments (U) Related Items (U)	
Question:	
How many days notice to give?	
Categories:	
Company Policies 🕴 Employment Law > Resignations 😢	
Normal \checkmark Arial \checkmark (Font Size) \checkmark $\stackrel{!}{=} \stackrel{!}{=} \equiv \equiv \equiv B I \underline{U}$ $\stackrel{!}{\otimes} \blacksquare \square A \checkmark \stackrel{!}{\gg} \checkmark$	
I have a situation where a staff member is wanting to give notice but they do not have a firm date of leaving. What is the best way to deal with this?	
Should I force them to set a date or can we negotiate this on a week by week basis?	
Allow Comments	Save as Draft 🛛 Add this article to my favourites list
	Save Cancel

Allow Comments will be ticked on by default, this will allow others to post comments against this Question.

Save as Draft will save the question but it will not be visible to others, it can be edited as needed and then unticked to make it visible to others.

Add this article to my favourites list is also ticked on by default as it makes searching for your own posts much quicker.

Click Save to save the Question to the Knowledge Base.

The Question can be found against the Categories that were set against it.

HR Kno	wledge Base		G 🛛 🚱 🕻
Type sea	rch string and press enter		Filters
0 votes	How many days notice to give? O Solutions Posted by Bridget Fairweather Company Policies Resigning	Last updated on Thursday, 07 December 2017 14:15	Favourites My Drafts Created By Me Subscribed Answered Unanswered Articles Questions
			Administration Applicant Screening Base Rates Coaching Methods and Tools Self Learning Tools Company Policies
			 Compliance Health and Safety Work Place Standards
			 Employment Law Contracts Resigning Job Postings
			 Orientation Existing Staff Person New Staff Person

The Question icon will change colour from blue which indicates the following:



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Create an Article

Click on the Create Article icon.

	Ha
🗗 🔂 🖂 🍕	, 🚯 📕 Jobs
Filters	Create Article

The New Article screen will pop up.

The Details tab is the landing page.

In this screen, the Article will need a meaningful Title.

lew Article		
Details Attachments (0) Related Items (0)		
Subject:	1	
Enter subject		
Categories:		
Select categories		
Description:		
Normal 👻 Arial 👻	(Font Size) ▼ Ξ Ξ Ξ Ξ Ξ = B I U · · · · · · · · · · · · · · · · · ·	
Allow Comments	Save as Draft Add this article to my favour	ites list
	Save	Cancel

Select at least one Category to assign the Article to.

To do this click on the Categories Field and a drop down list will appear.

Repeat this to add more than one Category.

New Article			
Details	Attachments (0)	Related Items (0)	
Subject:			
Enter sub	ject		
Categorie	5:		
Administ	ration		
Applicant	Screening		
Base Rat			
Coaching	Methods and Tools		
Coaching	Methods and Tools :	> Self Learning Tools	
Company	/ Policies		
Compliar	ice		

To assign under a Sub Category, these are displayed as "[Category] > [Sub Category]", the same principal as "Ask a Question".

Ν	lew Article							
	Details	Attachments (0)	Related Items (0)					
	Subject:							
	Invercarg	jj] Fire Emergency Pi	ocedure					
	Categorie	s:						
	Compliar	nce > Health and Saf	ety 😣					
	Descriptio	n:						
	Normal	✓ Arial	*	(Font Size)	▼ ¹ / ₂ 0 − €	Ξ	Ξ	

Enter in the Description of the Article.

There is some basic formatting tools for the content of the article.

Subject:	
Invercargill Fire Emergency Procedure	
Categories:	
Health and Safety 📀 Complicance 😒	
Description:	
Normal 🔹 Arial 🔹 (Font Size) 🔹 🗄 🗄 🗮 🗮 🗮 🗮 🖪 I U 🍪 🖬 🖸 A 🕶 💖 🕶 🔛	
1. Stay calm.	
2. Check for danger.	
3. Assess the fire.	
4. If you feel confident that you can put the fire out, use the fire extinguisher provided.	
5. One person calls emergency services - the caller then moves to a safe, visible point to await and guide the services to the accident site on arrival.	
Dial 1-1-1 The operator will ask what service you require – ask for FIRE	
You will then be put through to this service you require. Location -176 Spey Street, Invercargill	
Clearly state your name and the nature of the fire (ig what has happened).	
Telephone number is 03 211 0099	
6. Another person activates the evacuation alarm. 7. Follow site evacuation procedures. 8. The branch Health & Safety representative notifies management of the emergency. Management agencies including Worksafe NZ.	will then advise the necessary
9. No-one is to return to their work area until management gives the "all clear".	
☑ Allow Comments	Add this article to my favourites list
	Save Cance

Allow Comments will be ticked on by default, this will allow others to post comments against the article.

Save as Draft will save the article but it will not be visible to others, it can be edited as needed and then unticked to make it visible to others.

Add this article to my favourites list is also ticked on by default as it makes searching for your own posts much quicker.

Click **Save** to save the Article to the Knowledge Base.

The Article can be found against the Categories that were set against it.

pe search string and press enter	0	Filters
Invercargill Fire Emergency Procedure Ocomments Posted by Bridget Fairweather	IB 🖂 🗙	Favourites My Drafts
Compliance Compliance > Health and Safety	Last updated on Monday, 30 July 2018 16:30	Created By Me Subscribed Answered Unanswered Articles Questions
		Administration Applicant Screening Base Rates Coaching Methods and Tools Self Learning Tools
		Company Policies Compliance X Health and Safety Work Place Standards

Add An Attachment to an Article or Question

On the attachments tab of an article or question there is the option to browse for the file you wish to attach via the browse button, files can also be dragged here to be attached as per below:

Note: multiple files can be dragged and attached at once.

You can also attach files via the Add Attachment icon.

Edit Article						
Details Attachments (0) Related Items	; (0)					
Enter text to search	Search					
Type Name	PDF		Attached By	Client Visible	File Date	Size 🔗
	Z	There were no attachments found.				
Browse	D	prop a file here to add an attachm	ent.			
	+ Copy					

The default settings against the attachment are specified in your TimeTrak Setup.

Name: *	Fire Extinguishers		
File: *	Fire Extiguishers.png	×	Browse
	The maximum file size that can be uploaded is	20 MB.	
	Types of Fire Extinguishers		
Description:			
Category:	General 🔻		
Category:		Portal Visible	
Category:		Portal Visible	

Link to MYOB Exo Documents will be ticked on or off by default based on what is set in your global system setup within the Admin Console as shown below:

General	Admin Setting	s Email Settings	Customisation	Verification	Attachments	Support	Backup	
Attach	ment Storage:	Shared Folder						-
Shared	Folder:							-
User N	ame:							
Domair	1:							
Passwo	ord:					Ched	k Credentia	als
Passwo	ord:	🗌 Link Attachmer	nts to MYOB Exo	Documents		Ched	k Credentia	als
Passwo	ord:		nts to MYOB Exo re visible by defa		eTrak Client Por		k Credentia	als
Passwo	ord:				Trak Client Por		k Credentia	als

Client Portal Visible will be ticked on by default, based on what is set in your global system setup below:

General	Admin Setting	s Email Settings	Customisation	Verification	Attachments	Support	Backup	
Attach	ment Storage:	Shared Folder						-
Shared	Folder:							-
User Na	ame:							
Domain								
Passwo	ord:					Chec	k Credentials	;
		Link Attachmer	nts to MYOB Exo	Documents				
		Attachments a	re visible by defa	ult in the Time	eTrak Client Por	tal		
v v		shared folder stora eTrak. It is recomm						

Category This is the category the attachment will be available against, these categories are again stipulated in the TimeTrak global setup.

eneral Ad	Imin Settings	Email Settings	Customisation	Verification	Attachments	Support	Backup	
Attachmen	t Storage: S	hared Folder						
Shared Fol	der:							-
User Name	:							
Domain:								
Password:						Chec	k Credentia	als
		Link Attachmen	to to MVOR Evol	Documente				
					T 0 1 1			
	V	Attachments ar	e visible by deta	uicin the time	That Client Por	(a)		
Wher		ared folder stora Trak. It is recomm						
Wher	n using the sh iged by TimeT				share that end	users do n		
Wher mana acces	n using the sh iged by TimeT	rak. It is recomm			share that end	users do n	ot have	
Wher mana acces	n using the sh aged by TimeT ss to.	rak. It is recomm			share that end	users do n	ot have	
Wher mana acces Attachm Name	n using the sh Iged by TimeT Iss to.	rak. It is recomm			share that end	users do n	ot have	
Attachm Name Checkli	n using the sh iged by TimeT is to.	rak. It is recomm			share that end	users do n	ot have	
Attachm Name Checkli Gener	ent Categorie	rak. It is recomm			share that end	users do n	ot have	
Attachm Attachm Name Checkli Gener Photos	ent Categorie	rak. It is recomm			share that end	users do n	ot have	
Attachm Name Checkli Gener	ent Categorie	rak. It is recomm			share that end	users do n	ot have	
Attachm Attachm Name Checkli Gener Photos	ent Categorie	rak. It is recomm			share that end	users do n	ot have	

Edit an Attachment against a Knowledge Base Item

The ability to edit an attachment is based on the user's TimeTrak Profile settings

1. Edit Attachment must be enabled as per below:

ne: Admi	n Profile											
īmeTrak	Config	Alerts	MYOB Exo	Post & Invoice	Check In	Knowledge Base	Form Layout	Customisations	Checklists	Reports	Queues	Users
Show T	ime Entrie	es							Show	Disburseme	ents	
Add Tir	ne Entry								Add D	isbursemer	nt	
Z Edit Tin	ne Entry								✓ Edit D	isbursemen	it	
🛛 Delete	Time Entr	у							✓ Delete	e Disbursen	nent	
🗸 Add No	n Billable '	Time Entr	y						Show	Tasks		
Add No	n Product	tive Time	Entry						🗹 Add T	ask		
Show A	Appointme	nts							🗹 Edit Ta	ask		
🗸 Add Ap	pointmen	t							✓ Delete	e Task		
🖊 Edit Ap	pointment	t							Show	Task Activi	ties	
Z Edit Ap	pointment	t Recurre	nce						🗹 Add T	ask Activity	/	
Delete	Appointm	ent							🗹 Edit Ta	ask Activity	1	
🖉 Add No	n Billable i	Appointm	ent						Delete	e Task Activ	/ity	
Add No	n Product	tive Appo	intment						Show	Attachmen	ts	
											Attachmer	nts On Sub Job
										ttachment		
										ttachment		
										e Attachme		
									Show	User Profile	2	

2. The knowledgebase must be visible against their profile not "read only"

Click Edit against the Article/ Question

Then Click on the Edit Attachment icon against the attachment you wish to edit

Edit Article					Σ	3
Details Attachments (0) Related Items (0)						Je Tom
Enter text to search Search] Inclu
Type Name	Attached By	Client Visible	File Date	Size	æ	St
▼ General						In
D Invercargill Fire Emergency Procedure	Bridget Fairweather	Y	13/02/2018	118.91 KB	🏷 📀	8 In
Browse					Edit Atta	9 In chment
						2 1
						0 In

This will open the attachment screen where you can edit the details of the attachment and save, or delete the attachment by clicking the icon.

Attachment

lame: *	Invercargill Fire Emergency Procedure
ile:	Invercargill Fire Emergency Procedure.pdf
escription:	Invercargill Fire Emergency Procedure
ategory:	General
	V Link To MYOB Exo Documents Visible

23

Edit a Knowledge Base Article or Question

If permissions allow, users can click the "Edit" icon to edit the article/ question

HR Kno	wledge Base		G 🛛 🚱 🕄
Type sea	rch string and press enter]	Filters
0 votes	Invercargill Fire Emergency Procedure 0 Comments Posted by Bridget Fairweather Complicance Health and Safety	Last updated on Tuesday, 13 February 2018 11:49	Favourites My Drafts Created By Me Subscribed
•	How many days notice to give? 0 Solutions Posted by Bridget Fairweather	D 🔀 🛨	Answered Unanswered Articles
votes	Company Policies Resigning	Last updated on Tuesday, 13 February 2018 11:21	Questions
			Administration Applicant Screening Base Rates

Delete a Knowledge Base Article or Question

Click the edit icon against the article/ question

HR Knowledge Base

Type sea	rch string and press enter	
0 votes	Invercargill Fire Emergency Procedure O Comments Posted by Bridget Fairweather Complicance Health and Safety	Last updated on Tuesday, 13 February 2018 11:49
?	How many days notice to give? 0 Solutions Posted by Bridget Fairweather	IP 🔀 ★
0 votes	Company Policies Resigning	Last updated on Tuesday, 13 February 2018 11:21

The Edit article/ question screen will apear.

Click the delete icon in the bottom left hand corner.

Edit Question	23
Details Attachments (0) Related Items (0)	
Question:	
How many days notice to give?	
Categories:	
Company Policies 🛛 Resigning 🖸	
Description:	
Normal 🔻 (Font Name) 👻 (Font Size) 👻 j = 📰 🗷 🗷 🔳 🖪 B I <u>U</u> 🌚 📾 🖬 🔺 🖤 🕶 🔛	
✓ Allow Comments	Save as Draft
	Save Cancel

Relate an Article or Question

An article or question can be related against an **Article, Client, Contact, Job, Task, Serviceable Unit** or **Stock Item**

When you relate an Article or question to any of these options the article can then be accessed via these.

E.g. Stock – In Mobile (only) you can search stock and it will have a link to the article.

Relating an article or question can be done against the related items tab, click the "Relate" icon and select which option you would like to relate your article/ question to

Edit Article	23
 Details Attachments (1) Related Items (0) Description	Туре
There were no related items found.	Article Client Contact Job Task Serviceable Unit Stock Item

In this case the article is getting assigned to a job.

You can search/ select by client to limit the jobs or enter the job number directly.

Attachments (1) Related Items (0) ption There were no related items found. Select Job Select Client TI2155 - COMPANY POLICY REVIEW 12155 T
There were no related items found. Select Job 83 Select Client * 12155 - COMPANY POLICY REVIEW 12155 *
Select Job 23 Select Client 12155 - COMPANY POLICY REVIEW 12155
Select Client Select Client Selec
12155 - COMPANY POLICY REVIEW 12155
12155 - COMPANY POLICY REVIEW 12155
NEW 202
Status: NEW JOB
Type: MINOR SERVICE
Category: DOMESTIC
Contact: None
Lead Provider: Bridget Fairweather
Secondary Provider: Bridget Fairweather
Response Level: None
Ok Cancel

Now from the related items tab users can click the job icon to view the job the article/ question is related to.

Edit Article		23
Details Attachments (1) Related Items (1)		
Description	Туре	ଌ
COMPANY POLICY REVIEW	Job	💼 💫
		View Job

To remove the relation click the "Remove Related Item" Icon.

E	dit Article		23	
]	Details Attachments (1) Related Items (1)			Je Tomorrow 9
	Description	Туре	ଞ] Include Inact
	COMPANY POLICY REVIEW	Job	🚖 🔏	Status
			Remo	In Progress ove Related Item B In Progress 9 In Progress

From the Knowledge Base home screen the job icon is visible to show users the article/ question is related to a job.

Hovering over the icon displays the job name.



Against the job, users can see there is an article related to the job via the articles tab.

Details	Sub Jobs (0)	Job Financial Summary	Location	Appointments (0)	Time Entries (0)	Tasks (0)	Notes (0)
History Notes (0)	Articles (1)	Attachments (0)	Disbursements (0)	Purchase Orders (0)	Quote Lines (0)	Serviceable Units (0)	Rep	orts
tle					Posted By			
tle					Posted By		Posted On 🔻	1
ivercargill Fire Emerge	ency Procedure				Bridget Fa	irweather	13/02/2018	6
								_

Selecting the item will open it on screen for users to view.

Users can also remove the relationship between the article/ question from this here or add an additional realationship to another article/ question.

Share an Article or Question Link

Users may want to share an article they have created or think will be useful with a co-worker.

This can be done by clicking on the "Share" icon against the article or question, this will pop an Article Link box which users can then copy and send to a co-worker.

As long as they have a login to TimeTrak which has access to the Knowledge Base they will be able to go to the link.



Subscriptions

TimeTrak users can subscribe against a Knowledge Base to receive TimeTrak notifications and/or email notifications when new questions and/or articles are posted against the Knowledge Bases categories.

This can be done against the Knowledge Base by clicking the Subscriptions icon as below:

HR Kno	wledge Base		€ 🛛 & &
Type sea	rch string and press enter]	Filters
0 votes	Invercargill Fire Emergency Procedure 0 Comments Posted by Bridget Fairweather Complicance Health and Safety	Last updated on Tuesday, 13 February 2018 13:36	Favourites My Drafts Created By Me Subscribed
•	How many days notice to give? 0 Solutions Posted by Bridget Fairweather	II 🔀 关	Answered Unanswered Articles
votes	Company Policies Resigning	Last updated on Tuesday, 13 February 2018 13:35	Questions Administration Applicant Screening

This will open the Subscriptions screen where users can specify which categories they would like to get notifications against as well as what type of notification they would like to receive.

Enter text to search				
Category	Articles		Questions	
Administration	None	-	None	
Applicant Screening	None		None	
Base Rates	Email		None	
Coaching Methods and Tools	None		None	
Coaching Methods and Tools > Self Learning Tools	None		None	
Company Policies	None		None	
Compliance	None		None	
Compliance > Health and Safety	None		None	
Compliance > Work Place Standards	None		None	
Employment Law	None		None	
Employment Law > Contracts	None		None	
Employment Law > Resignations	None		None	

Right click the grid to view additional options

All categories can be updated at once instead of individually by right clicking on the grid.

Save Cancel

Subscriptions						23
Enter text to search						
Category		Articles			Questions	
Administration		None			None	
Applicant Screening		None			None	
Base Rates		None			None	
Coaching Methods ar	nd Tools	None			None	
Coaching Methods	Assign All Categories 🕨	Articles	•	News	" je	
Company Policies	, longit , in categories			None	1e	
Compliance		Questions	•	Email	le	
Compliance > Health	and Safety	None			None	
Compliance > Work F	Place Standards	None			None	

There is also the option to automatically subscribe to any new categories added to a Knowledge Base.

Automatically subscribe to new categories:	None	•	None	•
Right click the grid to view additional options				

Knowledge Base		G 🛛 🤇
pe search string and press enter		Filters
There were no articles found that	at match the search criteria	Favourites
		My Drafts
		Created By Me
		Subscribed
		Answered
		Unanswered
		Articles
		Questions
		Administration
		→ Applicant Screening
		Base Rates
		Coaching Methods and Tools
		Self Learning Tools
		Company Policies
		✓ Compliance
		Health and Safety
		Work Place Standards
		Employment Law
		Contracts
		Resigning
		Job Postings
		Orientation
		Existing Staff Person
		New Staff Person

Filters and the Categories will show in a panel on the right-hand side of the Knowledge Base

Applying a Filter

Click on Category or Sub Category to apply a filter. This will display all articles or questions that have that Category or Sub Category assigned against them.



A filter is shown as applied when highlighted in blue and will remain highlighted when the mouse is navigated away from hovering over the selected filter. Only one filter can be applied at any one time. To remove the filter click on the "X".



TimeTrak Mobile Knowledge Base

Articles and Questions created in TimeTrak Professional are also available in the field within TimeTrak Mobile.

Log into TimeTrak Mobile.

Under Profile, there is a Knowledge Base option, if this is enabled all Knowledge Bases visible against the user's profile will be available from the home screen.



Click on a Knowledge Base link to open the Knowledge Base panel.

Filter for articles based on type and/or category.



Features within an Article/Question

🗲 Back 😑 Menu	Hazard Register	*• •• •	Home
	3	~	
Article Security Alarm		01	votes
Bridget Fairw	veather 12 October 2016 14:28		
Security Alarm details	6		
1 🛧 Favourite			Ø
2 🖂 Subscribe			Ø
Article Summary			
4 Attachments			1 💽
5 Related Items		:	3 🕑
Comments			
Greg Manning Power cord to be fixed		Tuesday, 20 June 2017 16:07	Ø
6 見 Add Comment			Ø

1. **Favourite** - Click to add the article/question as a favourite, the star will show as yellow when selected, it will also automatically set this as a subscription to the article/question. By clicking this again, it will remove the yellow star which removes it from your favourites. A list of favourites is only visible in Professional.



2. **Subscribe** - By clicking subscribe, the envelope will show a green tick on it when selected. By clicking this again will remove the green tick and unsubscribe to the article or question.



3. **Notifications -** If an article has been subscribed to, any updates to that article or question will show in notifications (star) on the header bar.

🗲 Back 🚍 Menu	Hazard Register	Home
Article		0 votes

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🗲 Back	E Menu	Notifications	•	٥	0	f Home
Notifica	tions					
	A new comment has been posted by Bridget Fairw Wednesday, 5 September 2016 at 10.33 AM by Bridget Fairweather.	veather for the article in Hazard Register titled "TEST		30 m	inutes	ago

4. Attachments

shows number of	attachments	
against the	article	
chments	★ 0 ① 0	Home
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		Add Attachment		
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vnload	0			
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ete	Θ	Description		
tachment Description				
ke yourself familiar with the location of the firm	is extinguishers	Category	General	
age Preview			Visible in TimeTrak Client Portal	
		Save		
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5. **Related Items** – users are easily directed to related items if they have been linked in the Knowledge Base set in Professional.

🗲 Back 🚍 Menu	Related Items	f Home
Related Items		
Parts and Service		Ø
K and B Bowden		Ø
ALARM05 - SECURI	TY ALARM	Ø

6. Add Comment - users can leave a comment.

