



UNIVERSITY
OF ILLINOIS
SYSTEM

ALTOGETHER EXTRAORDINARY



If the Suit Fits...

Transitioning KB Duties to the Service Desk

Presented by Shawn Lee, University of Illinois
2020 KB User Group Meeting – 7/17/2020



Introduction

- About me
- AITS Service Desk
 - 10 FTE, 3 students
- KB user since 2015



Our Challenge

- Transition all KB duties and maintenance for the University of Illinois System Offices to the AITS Service Desk within 6 months
- Questions:
 - What duties exactly?
 - Training?
 - Just lift and shift?
 - Distributing the work?
 - After transition, then what?



Agenda

Background

Defining the duties

Building skills and talents

Distributing the work

The road ahead



Background

- **Our KB**
 - <https://answers.uillinois.edu/systemoffices>
 - 1424 active articles
 - Distributed ownership model
 - Was maintained by 1 FTE
- **Where the Service Desk lives!**
 - Primary resource for assisting customers
 - Primary resource for our internal docs
 - Screen new articles with customer eye
 - Own 15% of active content

Background

- **The Transition Period**
 - February 2020 – July 2020
- **Use an iterative approach**
 - One step at a time



Defining the duties

- Identified 23 individual tasks
- The immediate tasks:
 - Reviewing & activating new/edited articles
 - Expired document handling
 - Responding to user feedback
 - Reassigning ownership when people leave



Defining the duties

- From those tasks, we identified 11 roles
- The immediate roles...
- **KB Content Reviewer (Level 1)**
 - First point of contact for handling document activation requests, expired documents, user feedback, and requests to share documents
 - Reviews expiring and expired KB articles, following up with KB Article Owners and reassigning article ownership as necessary
 - As part of review, engages with Article Owners as necessary
 - Ensures accuracy and quality of content is met before publishing
 - Able to make minor updates to documents as needed

Defining the duties

- **KB Content Reviewer (Level 2)**
 - Edits existing documents that require extensive updates
 - Proactively works with Service Owners and Service Admins to create, update, manage, and publish KB articles in support of IT services
 - Manages KB users and groups
 - Works with KB Site Administrator to ensure the KB as a whole is well organized and easy to use.
 - Works independently and collaboratively on KB improvement projects
 - Helps KB Site Administrator maintain KB organization (topics tree, etc.)

Defining the duties

- **KB Content Designer**

- Focus on the "presentation" and "polish" of the KB content
- Has sharp eye for writing and editing.
- Skilled in writing clear and concise support articles
- Well versed in HTML and CSS
- Functional knowledge of Javascript
- Expert in importing documentation from external sources such as Microsoft Word, PDF, web pages

Defining the duties

- **KB Content Lead**

- Oversees the work, coordination, and training of Content Managers and Content Designers
- Manages KB improvement projects

- **Started by communicating the roles to the team**

- You can serve in multiple roles
- Start where you are



Building skills & talents

- Training...we needed it!
- The basics
 - kbGuide
 - HTML/CSS/Javascript training
 - Technical writing training
- We needed more...



Building skills & talents

- We built a training video library in Kaltura
- We had collaborative demonstration sessions
 - Tips & Tricks training series
- We had experienced mentors
- We had motivation...
 - A strong sense of ownership
 - this was our KB!
- Phase-in approach with some tasks
 - After training was completed
 - We handled the task on certain days of the week

Distributing the work

- **Easy...Use the ticketing system**
 - Activation request emails
 - Expired document emails



Distributing the work – KB Tickets

Scoreboard as of
07/16/2020 08:36 pm

Update Counts

Request List Search Show Filter Clear Filter Edit in List Export

1-5 of 5

Request #	Status	Open Date	Summary	Group	Assigned To	Affected End User	Priority	Parent	Last Modified Date
R5180636 *	In Progress	07/09/2020 12:06 am	Knowledge Base Content Expired (1 document)	AITs-KB Reviewers Level 1	Pate, Wesley D	Tanner, John R	3-Normal		07/09/2020 12:29 pm
R5180637 *	In Progress	07/09/2020 12:06 am	Knowledge Base Content Expired (1 document)	AITs-KB Reviewers Level 1	Pate, Wesley D	Gibson, Laurence Patrick	3-Normal		07/09/2020 12:27 pm
R5180635 *	In Progress	07/09/2020 12:06 am	Knowledge Base Content Expired (1 document)	AITs-KB Reviewers Level 1	Pate, Wesley D	Cowsert, John T	3-Normal		07/09/2020 12:06 pm
R5177376 *	Hold	07/06/2020 12:06 am	Knowledge Base Content Expired (27 documents)	AITs-KB Reviewers Level 1	Steenbergen, James Christopher	Muehling, Thomas A	3-Normal		07/16/2020 07:07 am
R5176563 *	In Progress	07/04/2020 12:06 am	Knowledge Base Content Expired (2 documents)	AITs-KB Reviewers Level 1	Pate, Wesley D	Gibson, Laurence Patrick	3-Normal		07/16/2020 10:55 am

Scoreboard Alt+X

- (0) My Tickets
- (0) Client Updated
- (1) Needs Action AITS-SD
- (20) All Open AITS-SD
- (5) All Open AITS WR
- (22) All Open DS Customer Service
- (5) All Open AITS-KB
- > Production Requests
- > Reports
- > Tech Services After Hours
- > Change Orders
- > Configuration Items

The road ahead

- Communicate the transition
- Practice & refine “soft” skills
- Continued Tips & Tricks sessions
- Fill the role of “KB Trainer”
- Start on tasks towards KB improvement
 - Identifying and remedying outdated and unhelpful articles
 - Beautify existing articles
 - Topics
 - Classifications (instructional vs. troubleshooting vs. reference)





Thanks!

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