



Knowledge Management with SMAX

Enable and leverage organizational information to empower your service desk agents and users, allowing them to track and resolve issues faster and more easily, with AI and machine learning at the core for a modern ITSM experience.

SMAX Knowledge Management

- **Increased service desk agent efficiency**
Leverage knowledge across your organization
- **Superior employee self-service experience**
Consistent answers, fast resolution of requests and issues
- **Decreased costs**
Lower call volumes and restore services faster

The What and Why of Knowledge Management

Knowledge management is a capability that allows your IT department to gather, analyze, store and share information about the services managed by SMAX.

SMAX knowledge management enables agents to solve requests and issues faster, and users to solve problems via self-service. SMAX knowledge management functionality includes:

- **Knowledge articles** capture knowledge for agents and users in a curated knowledge database. They can be added, modified, and deleted.
- **News articles** are shown in the service portal and typically include information about critical, time-sensitive issues or other important content. They can be added, modified, and deleted.
- **Models** (templates) simplify article creation ensuring consistency, for example, applying the same design and layout. They can be added, modified, activated, and retired.
- **Q&A** functionality enables agents to moderate questions and answers from service portal users. They can edit or delete questions and answers or post new answers.
- **Hot Topic Analytics** heatmap enables agents to analyze questions and requests submitted by the service portal users, as well as the types of information users are looking for.

Creating Knowledge

SMAX manages the lifecycle of knowledge. Knowledge can be manually created within SMAX as knowledge and news articles which can come from a variety of sources and typically include ITSM processes such as incident and problem management. It can also be entered or uploaded directly from other internal and external data sources.

Knowledge and News Articles

Knowledge articles typically include information about a service or a component, for example, 'how to' guides. News can be alerts, notices about critical issues, or temporary changes to a service. An example is a news article about a planned outage of the email service. News articles typically have a shorter lifetime than knowledge articles.

The article workflow consists of four steps: creation, publication, consumption, and retirement. In the creation step, the title and content of the article are created. For the content, you can use a variety of rich text components, including links, images, and tables, and the article can relate to a specific service. Next, the article will be reviewed using SMAX's discussion feature. It can then be published as an internal or external article. External articles are available to everyone, while internal articles are only available to agents. Once the article is in the consumption phase, it is available for user searches as a knowledge article or automatic display as a news article. If a knowledge or news article is identified as no longer useful, it enters the retirement phase and will be archived.

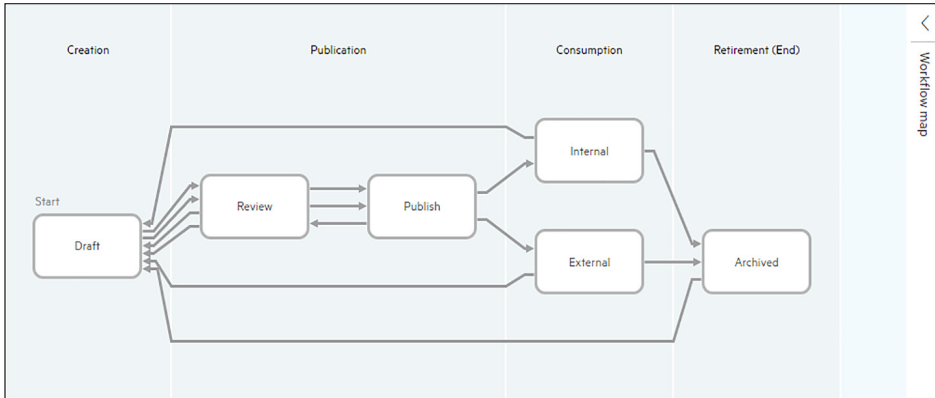


Figure 1. Knowledge management workflow

External Knowledge Sources

SMAX directly integrates with Microsoft SharePoint and Confluence—removing the need to import the data. When users search for information in the service portal, or chat with the SMAX Virtual Agent, for example, they can automatically get knowledge articles from multiple Microsoft SharePoint and Confluence servers, in addition to the articles found in SMAX.

Localization

Articles can support multiple languages allowing users to perform searches and view articles in their own language. SMAX provides functionality to export articles so they can be externally localized and loaded back into SMAX after translation.

Accessing Knowledge

Based on an intelligent search engine, powered by AI, SMAX provides multiple ways for searching and consuming knowledge with entitlement rules that control which users (agents, admins, end-users) get access to what knowledge, providing role-based information.

Knowledge Search

The service portal has a search capability allowing users to search using natural language, presenting results from the knowledge database and external knowledge sources. Search results can include knowledge and news

articles, Q&As, and service offerings. Results can also be generated from Confluence and Microsoft SharePoint.

Global Search

Global search enables agents to perform a search across not just the knowledge database and external knowledge sources but the entire SMAX system. This includes information captured across incidents, problems, changes, etc., with the information accessible when drilling down into the relevant record.

Live Support

Live support is a dedicated user interface optimized for service desk agents whereby inputting the requestor's query, SMAX checks for related information like Knowledge Articles, News, Q&As, and Favorite Articles. It provides an automatic display of real-time information which the agent can use to resolve the query or share with the requestor.

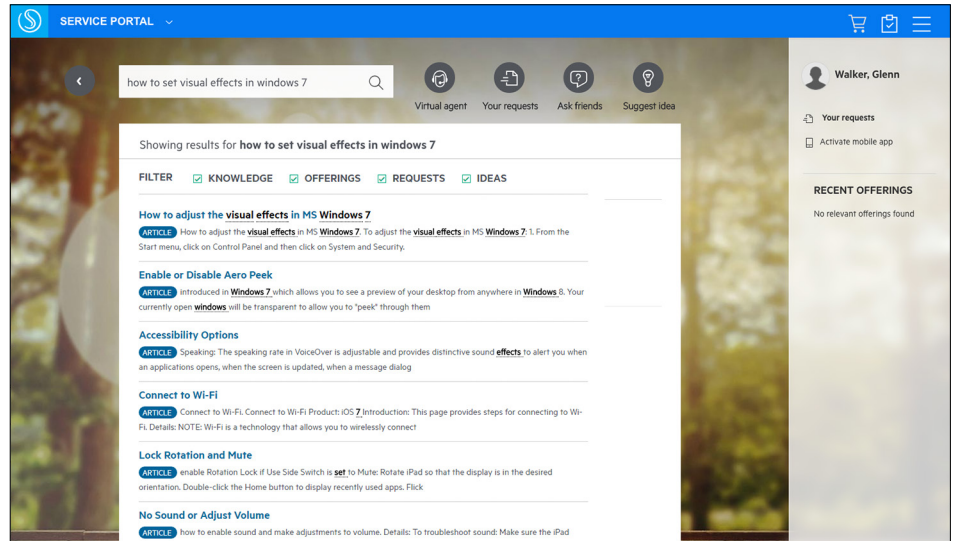


Figure 2. Knowledge search results

Request or Incident Support

Knowledge can also be accessed as part of a workflow. The Suggested Solutions feature enables agents to directly take advantage of knowledge by using it in the context of a particular incident or request. Agents and end-users

automatically benefit from the knowledge without the need for explicitly searching the entire SMAX system. As a result, it shows the most likely knowledge candidates such as incidents, changes, and other SMAX data.

Hot Topic Analytics

Unique to SMAX, Hot Topic Analytics benefits knowledge management in two ways. You can figure out how knowledge is being used and where it can be improved—leveraging user data to improve knowledge management.

Firstly, it can identify common content in support requests and user searches, allowing agents to easily see what information users are looking for and whether it is already supported by a service offering or knowledge article.

Secondly, from within the heatmap, agents can select multiple search results to create new articles or support offerings.

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[OpenText CEO Mark Barrenechea's blog](#)

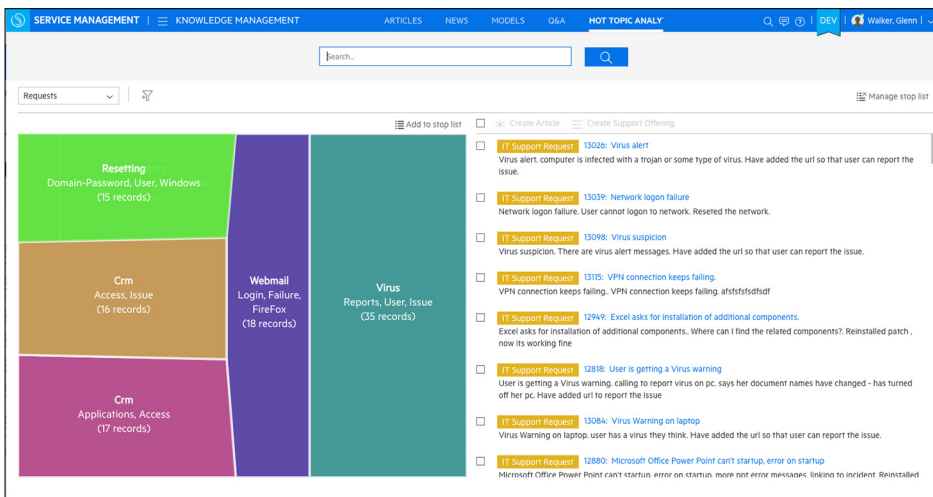


Figure 3. Hot Topic Analytics heatmap and search result

OpenText SMAX, an industry leading ITSM and ESM solution, provides superior service experiences and results to your service desk. It delivers modern ITSM processes, including incident, problem, configuration, change, release, knowledge, catalog, request, and service level management.

Learn more at
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