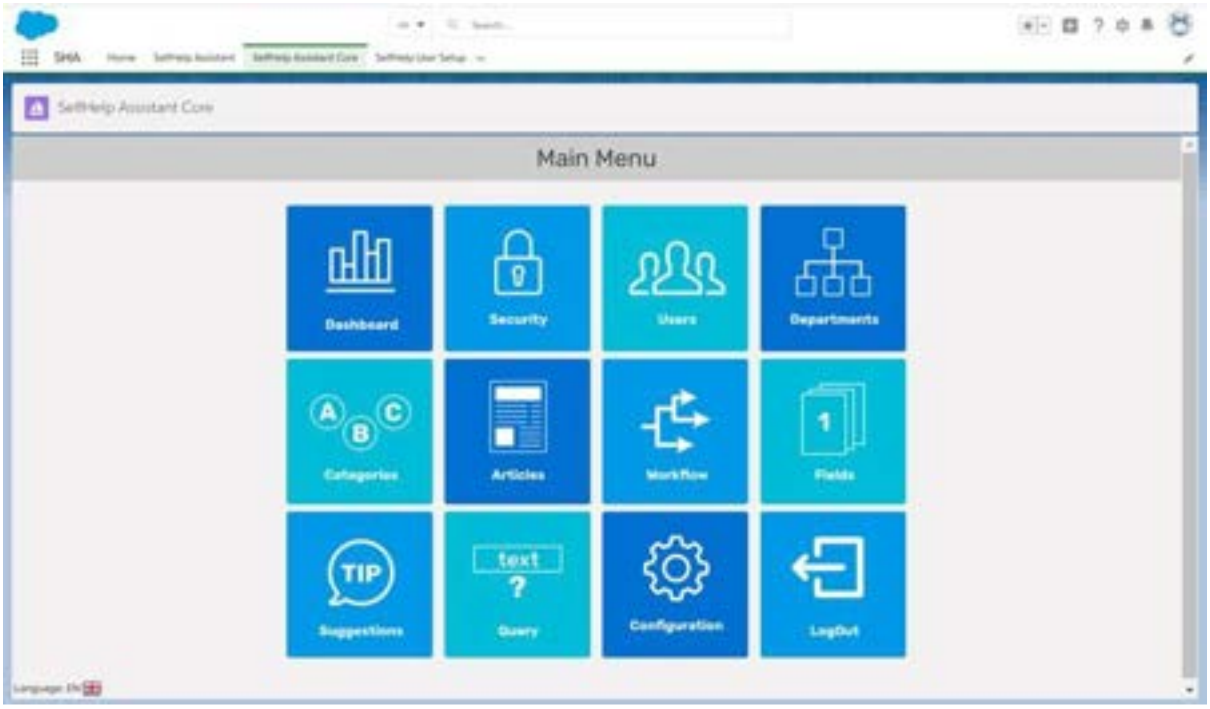
INTRA SF Backend User Manual

V.3.0 May 2023



Contents

USER MANUAL

SHA INTRA system is formed by two main working areas: Front Office and Back Office.

The Front Office is the part of the application that is integrated into the object **SelfHelp Assistant** of Salesforce SHA application

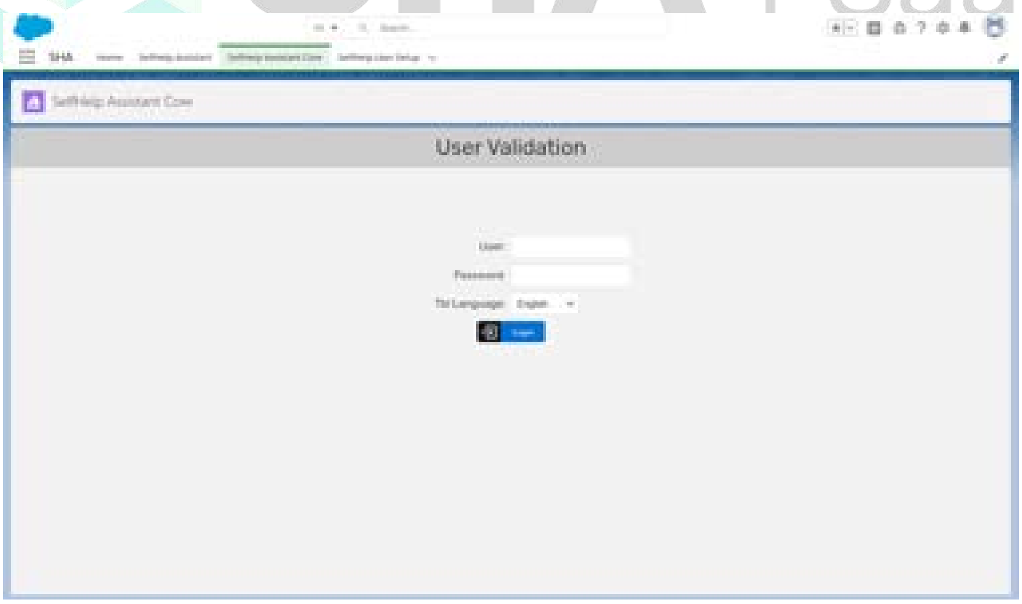
The Back Office or backend can be accessed through object **SelfHelp Assistant Core** of Salesforce SHA application.

1.- Log in

The access to backend is done through **SelfHelp Assistant Core** tab.

As a side note: users are imported from Salesforce, once the Salesforce admin assign access privileges to SHA. The process creating itself is done through a batch process that runs every 5 minutes on the SHA servers. When creating a new user in the backend area username, department, knowledge fields and markets are imported from Salesforce user interface of SHA.

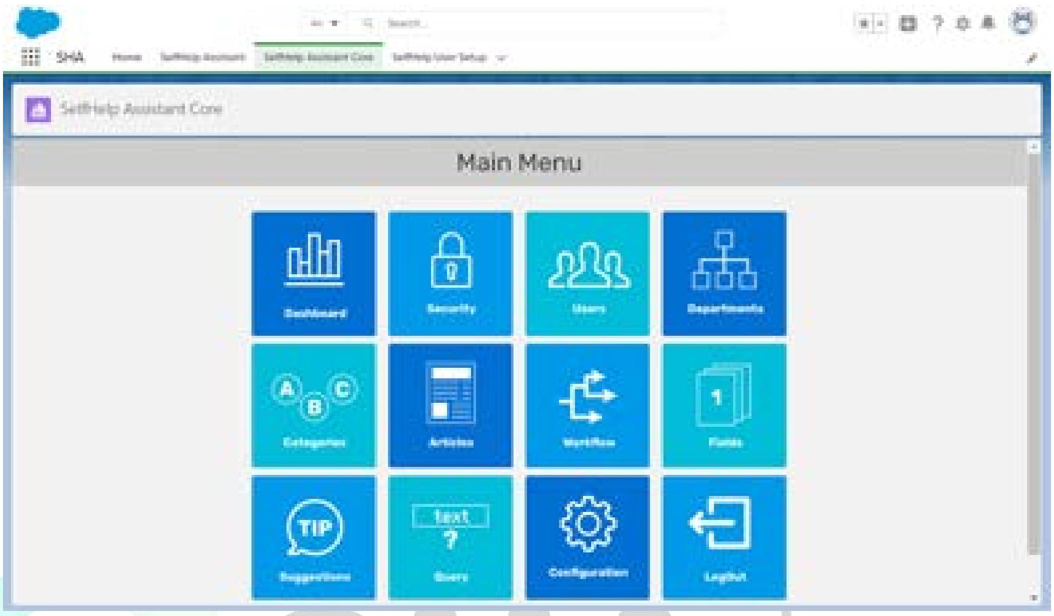
To access the application, you must enter the username and password. It is also necessary to select the working language of the database (default English) and press the **Send** button:



The system will verify both the user has JavaScript enabled on his computer and that the data entered exists in the database. If both conditions are met, access will be given to the main menu screen.

By default, you will be asked to reset your password from time to time (standard configuration is every 30 days).

In addition, the application manages user access by active licenses: only a number of users equal or lower than the licenses of the application (see **Licenses**) will be able to log in.



Main menu consists of eleven different areas that are:

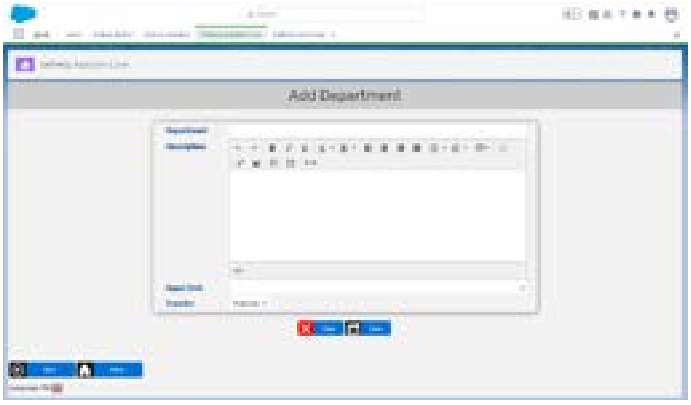
1) **Global configuration**: through this section application general parameters are defined: length of listings, type of filters, search variables, GDPR options, etc.
2) **Security**: this area, which is merely descriptive, details the different levels of access to the system according to the profile assigned to each user.
3) **User Maintenance**: section responsible for user management where you can register, modify, and delete.
4) **Department Maintenance**: in the same way as in the case of users, this section does the same with the Departments of the Organization of the client.
5) **Category Maintenance**: SHA organizes the information based on a thesaurus (category), to access and search the information in a more agile and fast way. In this section you can introduce, modify, and eliminate the different categories that make up the Thesaurus.
6) **Content Management**: section dedicated to content management or system articles. Through it, you can create articles, edit them, modify them, define Q&A trees, modify them, provide them with graphic content and visualize the tree in "Front Office Simulation" mode.
7) **Workflow Management**: section dedicated to the article life cycle management.
8) **Knowledge Field Management**: SHA allows you to organize content in addition to Thesaurus by large thematic areas. This section is responsible for the maintenance of the same.
9) **Suggestion Management**: section including user search history as well as tools for search optimization.

10) **Global Query**: section for querying contents by applying various filters on the search command.
11) **Dashboard**: detailed analysis of the information managed by SHA as well as its usage by visitors.

Likewise, the **Logout** button that ends the user section in the application appears in the lower left.

2.- Creating a department

To create a department click on the **Add** button, and following screen will appear.

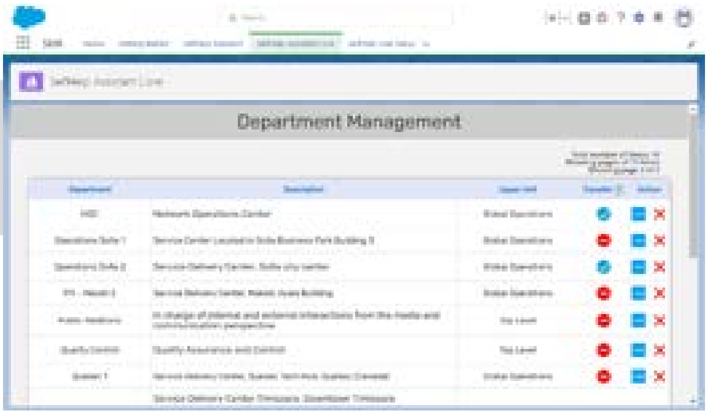


Each department has three associated fields: name, description, and superior department if there is one.

As an example, we are going to introduce a department that is called Operations, with its description and in the drop-down we will assign the option "Top Level", which means that it will not have any other Department above.

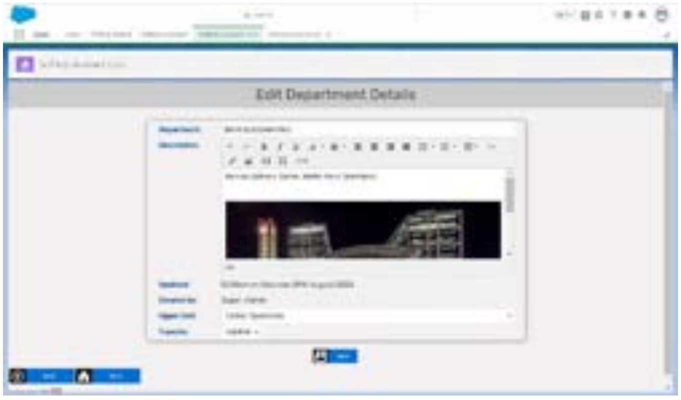
When entering the data, the application verifies that we include at least the name and description.

The **Department Maintenance** screen shows the list of all departments stored in the database as well as some properties: For each department, the table right zone shows the options **Details** and **Delete.** The Transfer column indicates if this property is active or no: when active, visitor feedback is sent directly to article owner for review.



By clicking on the **Details** option, we access the information of each department, as shown in the picture below.

As you can see, the menu located in the bottom left of the screen allows you to return to the list of Departments, edit the content or return to the main menu.



If we press the **Edit** button, edit mode is activated and we can modify fields in the Department record.

Data related to the user and creation date are shown as well.

To save changes made, just press the **Save** button. If not, pressing the **Back** button returns to the previous screen; another available option is to press the **Menu** button that returns the main screen of the application.

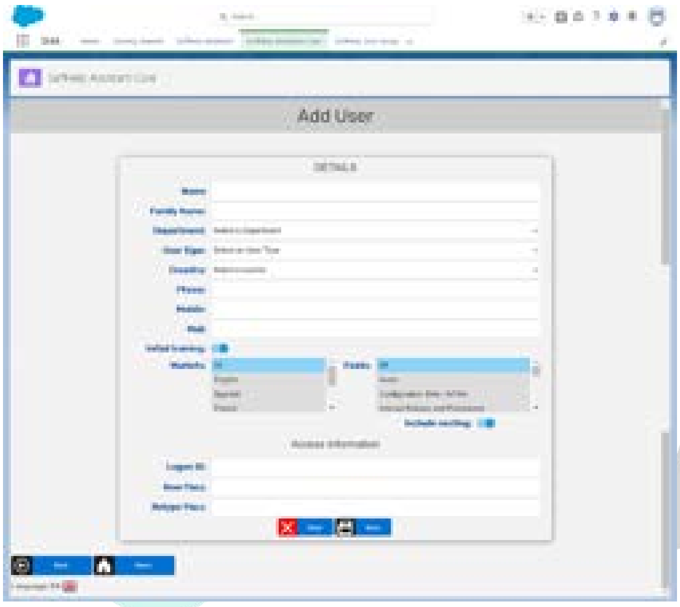
As last remark on Departments section, main screen of the department allows you to delete departments from database, by pressing the **Delete** button. The information associated with will not be lost. The system updates the associated records with “unassigned”, so all users in that department will appear as "**unassigned**".

3.- Working with Users

As previously mentioned, users are created on INTRA backend by importing data from Salesforce after admin request. This is a batch process that creates the user, department, markets to access and allowed knowledge fields.

In any case, user can be created from the backend, as in legacy installations, but they will not be operational on Salesforce installations.

For educational purposes only, you can see attached view of **New User** screen.



Requested data to create a user: name, department, country, user type (1), telephones and contact mail.

If user has already received initial training, the “Initial training” check box must be selected.

You must assign the allowed markets (languages) the user will have access to. In the same way, allowed Knowledge Fields will have to be defined. These two inputs define the access level a particular user is granted when logging into the system.

Note 1: see **Security** section to check all user types

Next, the alias of the user is entered (logging name) and the password initially chosen.

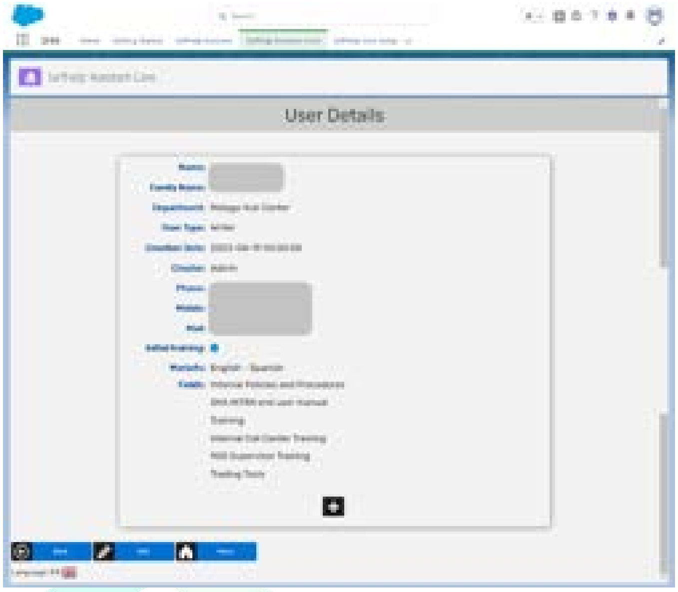
As a remark, when you create a new user in a particular language, the department is only set in that language. The remaining languages will show that used assigned to an “Unassigned” department. The reason behind is that department structure may vary by language/market. You will be able to assign the department at language/market label using the User editing feature.

User Maintenance section already shows the detailed list of registered users in the system. It is important to note that information shown in the **User Maintenance** section can be ordered by three criteria: Department, Name or User Type. To do this, simply click on the corresponding link located at the top left of the page.

As a side remark, not all users have access to this section of SHA (see **Security** section); however, each user will be able to access his/her information, being possible to edit and modify it.

For those users with proper privileges, two action buttons will be shown for each user: **Details** and **Delete**.

By pressing the **Details** button, information stored is accessed, as shown in the following picture:

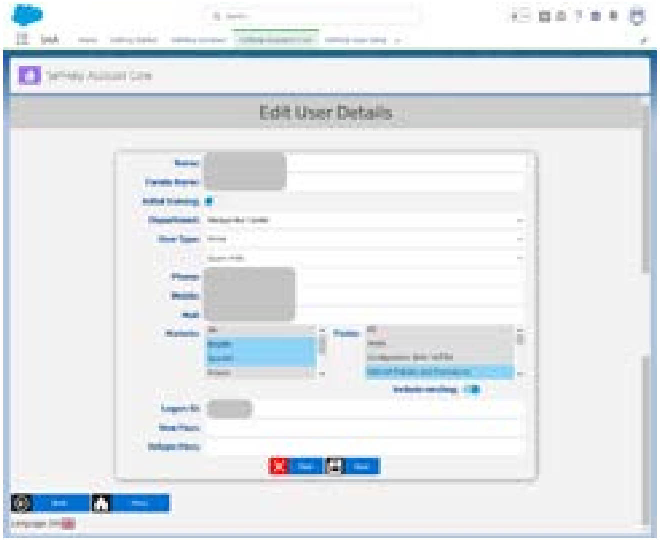


Again, a menu appears in the bottom left of the screen with possible options: return to the **User Maintenance** section, edit the current record, or return to the **Main Menu**.

You may notice that there is a "+" button included on the screen. By pressing that button, you will have access to a list of articles created by that user (list length is defined on the configuration section).

Pressing the **Edit** button activates editing mode, with the particularity that in the case that the user only has privileges to see his own data, department and type fields will not be shown.

In edit mode you can make changes to all table fields, being creator and creation date fields updated. Once all the changes have been made, they will be stored by pressing the **Save** button. The system will show a confirmation message as shown in the following images.



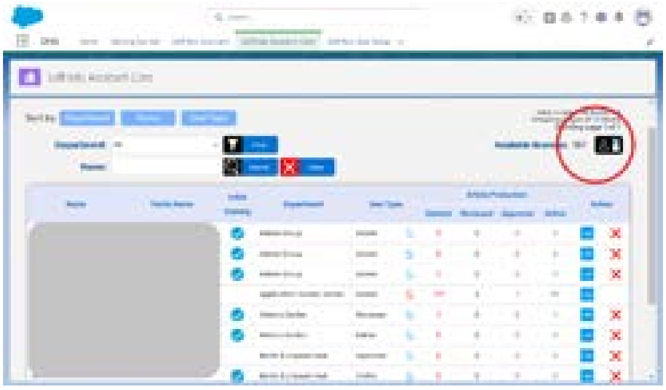
To add or modify users the procedures described above are used. The only action that has not been described is the deletion of users.

To do so, in the main screen of the section, when the user has the appropriate privileges, a column with the **Delete** button appears within the action area.

Pressing that button, and after the confirmation of the action, user will be deleted.

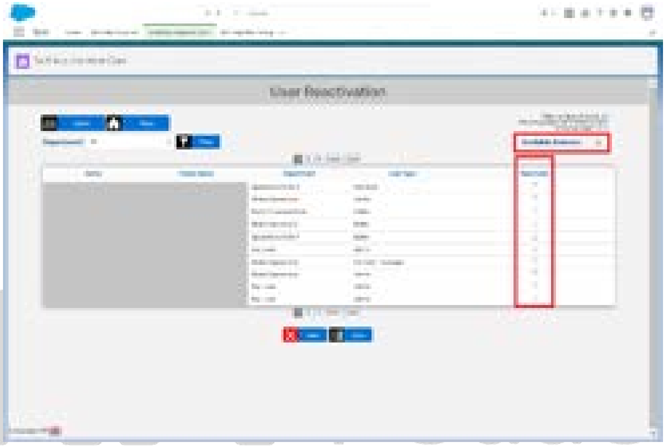
3.1.- Managing available licenses

When the logged user has admin credentials, the **User** screen shows the available licenses for new users or for old user reactivation, as shown in this picture:



If there are users into the database that have been deleted and you still have available licenses, an extra button for reactivation is shown as well: you can access the list of old users by clicking on that button, that leads to the user reactivation screen.

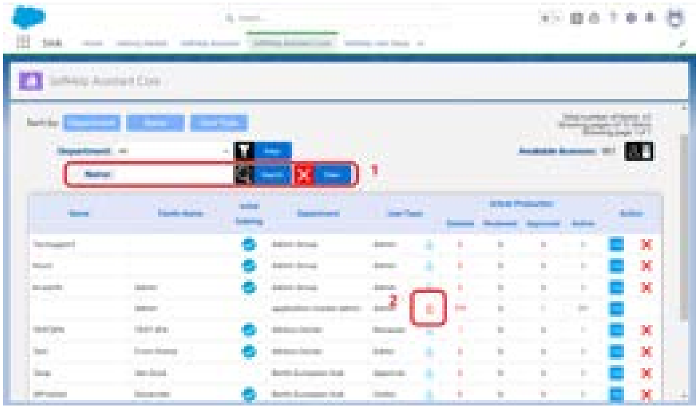
In that screen, you only need to select the user you desire to reactivate and save.



3.2.- Other user features

The main user screen presents two additional and useful features:

- You can filter by department and username, to locate a particular user **(1)**: once you start typing username or family name, username suggestions will appear underneath the input text. You can select one of those. By pressing the **Search** button, data of that user will be loaded on screen. This is search is done in combination with value of department input. To look for all departments, department option must be set to all. **Clear** button will delete both department selection and use name input on the search field.



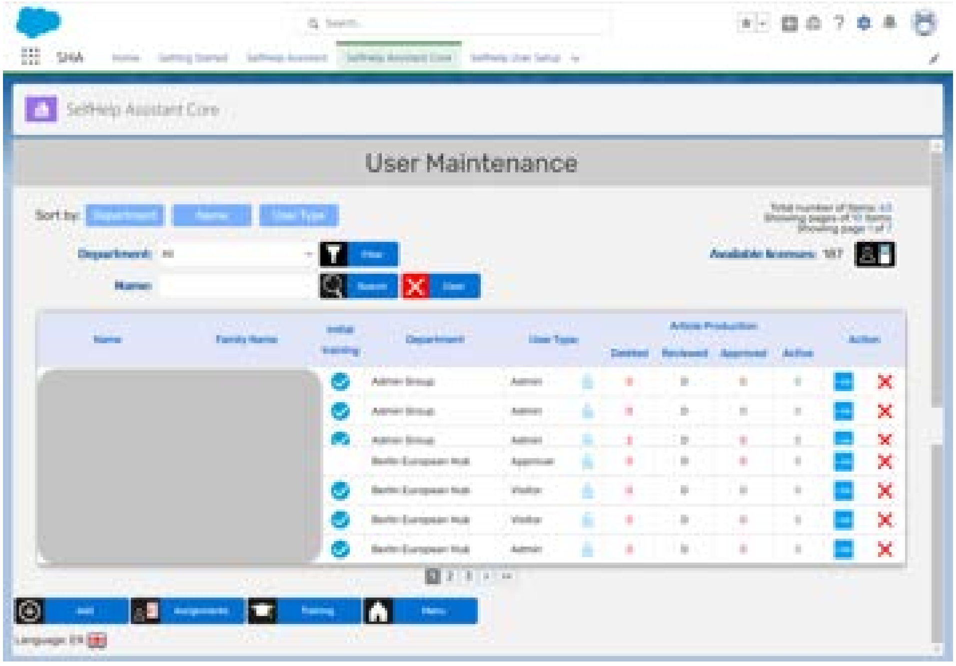
- You can unlock user accounts when they become blocked in the backend (normally when user quits the application in a wrong way) **(2)**: just click on the lock icon.

3.3.- Managing user access to Knowledge Fields

Since September 2021, on v.2.0 release, this new feature is available: at the beginning of this chapter, we saw how a new user is created and there, knowledge fields were selected to grant access to the new user to those contents.

However, during INTRA usage, new field may be added, what makes the field access management more complicated. Of course, it can be done by editing a particular user profile, but if your installation contains hundreds of users, updating privileges is a tedious task.

To facilitate this process, on the User screen a new button has been added: Assignments, as shown on picture below:



By clicking on this new button, you access to the User Field Assignment management screen, which aspect is shown on the picture below:

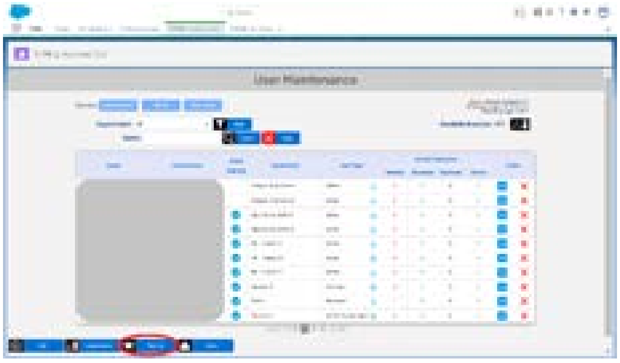
The screen is divided into two vertical sections: the section on the left allows to filter both Knowledge Field and Department, as well as filter results and save the changes you make on the right section.

The right section presents, for each field selected on the “Field” select box if a particular user has credential (highlighted in green) or no. On this right section you can move through the pages as well by using the “paginator” located at the bottom of the section.

In practical terms, granting or removing access to the selected field, can be done as a bulk operation by using the Swap all checkbox at the top of the data grid, or selecting or deselecting the checkbox for each individual user. Once you press the **Save** button, all changes will be stored.

3.4.- Training Management

On release 1.9. training management has been added. To do so, some additional features have been incorporated, including training reporting. It has been included under the **User Maintenance** section. To access the reporting screen, **the Training** button, located on the bottom left section of the screen, needs to be pressed.



To use training feature, is required to indicate that an area of knowledge or category is dedicated to training (see corresponding chapters), or to indicate that a specific article corresponds to training.

When such marks have been created, post-assigned articles, either to the subject area or category, become mandatory for all users with access to those fields (an especially if training override option is selected).

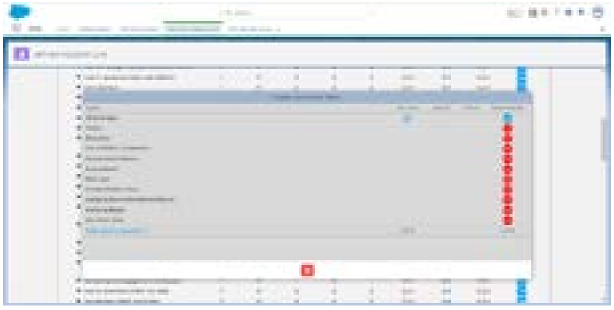
The Training Management section offers information about all fields, categories and individual articles defined as "Training" and the degree of completion of training activities.

On the top left of the screen there are several variables that can be used for filtering the results.

On the top right side, the overall degree of execution is shown, including % of pending actions and % of on time actions versus time targets.

SHA monitors the progress of training by computing all the training sessions required: all users with access to the knowledge area, category or article marked as training are computed, requiring one session per user. When a knowledge area or category are defined as training, a window -span- is assigned in days, which corresponds to the time available from article activation until the completion of the training. When a user visits an article within that window, the training is considered to have been done on time, otherwise it was done late.

The lower section of the screen details, for each individual article involved, the degree of execution of training activities.



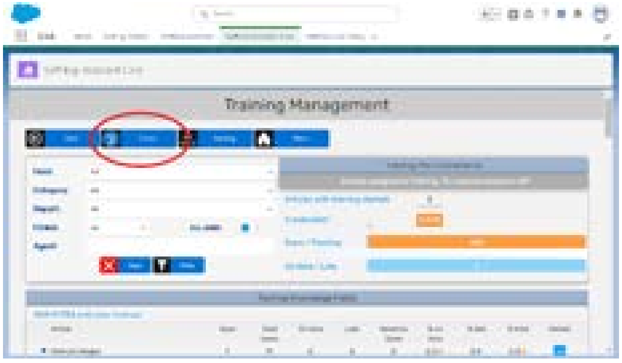
Each individual article can be reviewed by pressing the Info button located on the right side of each line. Information of users required to review the article is presented as well as the individual degree of execution.

This information is available only if the working market is not having a restrictive regulation regarding users' privacy (i.e. France or Germany).

3.5.- Quiz Management

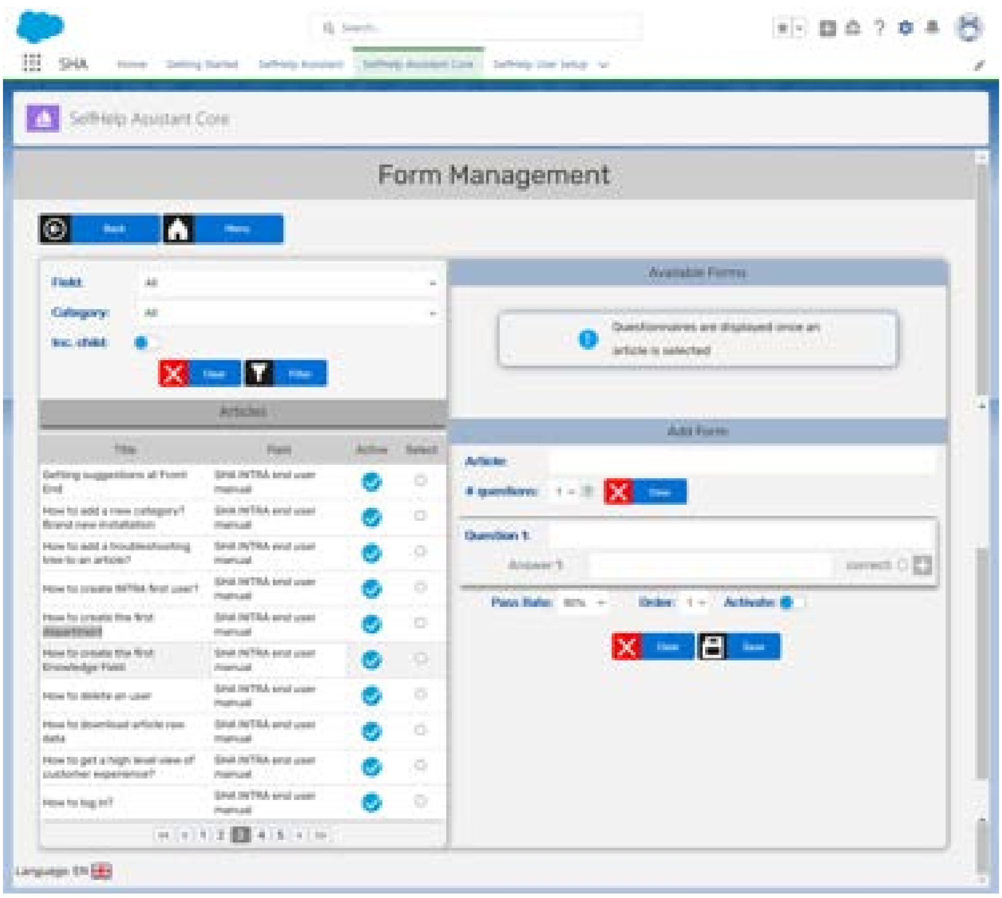
INTRA includes the option of adding quizzes to evaluate the degree of knowledge acquired when reviewing articles on training mode.

To access this feature, you have to press the button **Forms** located in the top left menu in the **Training Management** screen.



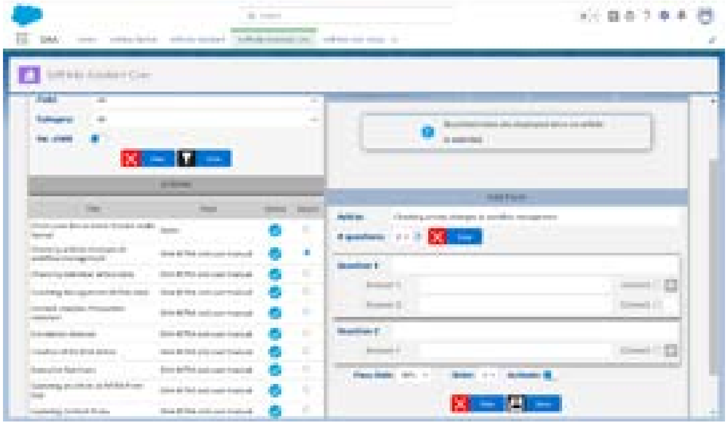
Once done, Form Management screen is presented. It is organized in four sections:

1) Top left: allows article filtering by Field and Category.
2) Top right: shows available forms for the selected article.
3) Bottom left: list of articles, allowing the selection of any of them.
4) Bottom right: add from area.



To add a new quiz, the first action is to select any article. Once done, the Article field will be populated on the right side of the screen. Next step is to define the number of questions and the number of answers for each question, using **“# questions**” select box and the icon on each individual question.

The form will be populated with additional fields. At this stage you can type both questions and answers. Next step will be select the correct answer for each question.



The lower section of the form includes three additional options:

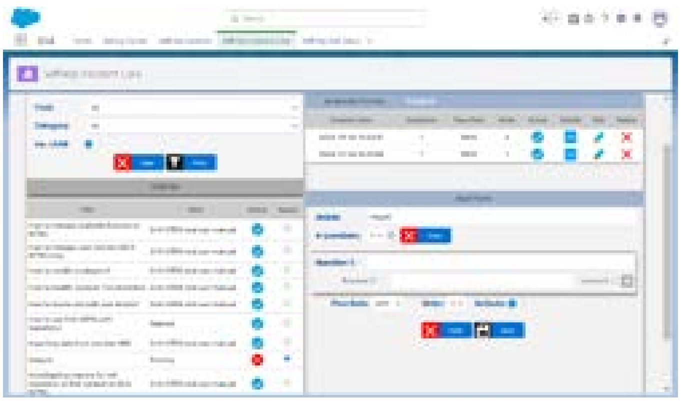
- Pass Rate: defines the % of correct answers that is required to consider that quiz has been passed.
- Order: defines which article will be presented first, in the case that several quizzes have been created for a particular article.
- Activate: sets the quiz as available for usage on training mode.

Quiz can be reset by using the button **Clear** and store by using the button **Save**.

Once the quiz is saved, the top right section of the screen will be update with the new form, and you can add additional forms.

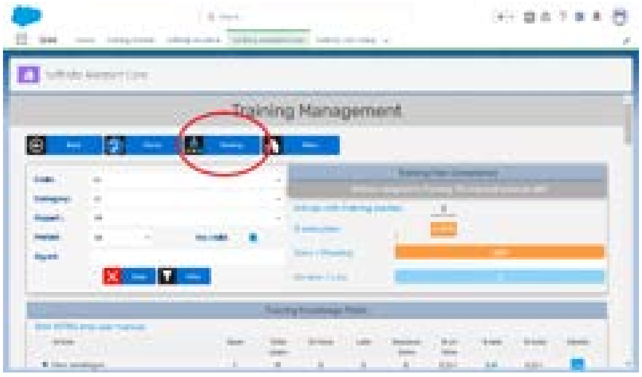
As you may notice, the list of available forms includes information and action buttons:

- Details: opens a popup screen with the details of the quiz.
- Edit: allows to modify the text of the form as well as status and pass rate.
- Delete: removes the quiz from the article.



3.6.- Training Ranking

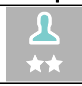
The final feature for training is the user ranking, as introduced in the Training-User Ranking section. It is accessible from Training Management via the **Ranking** button.



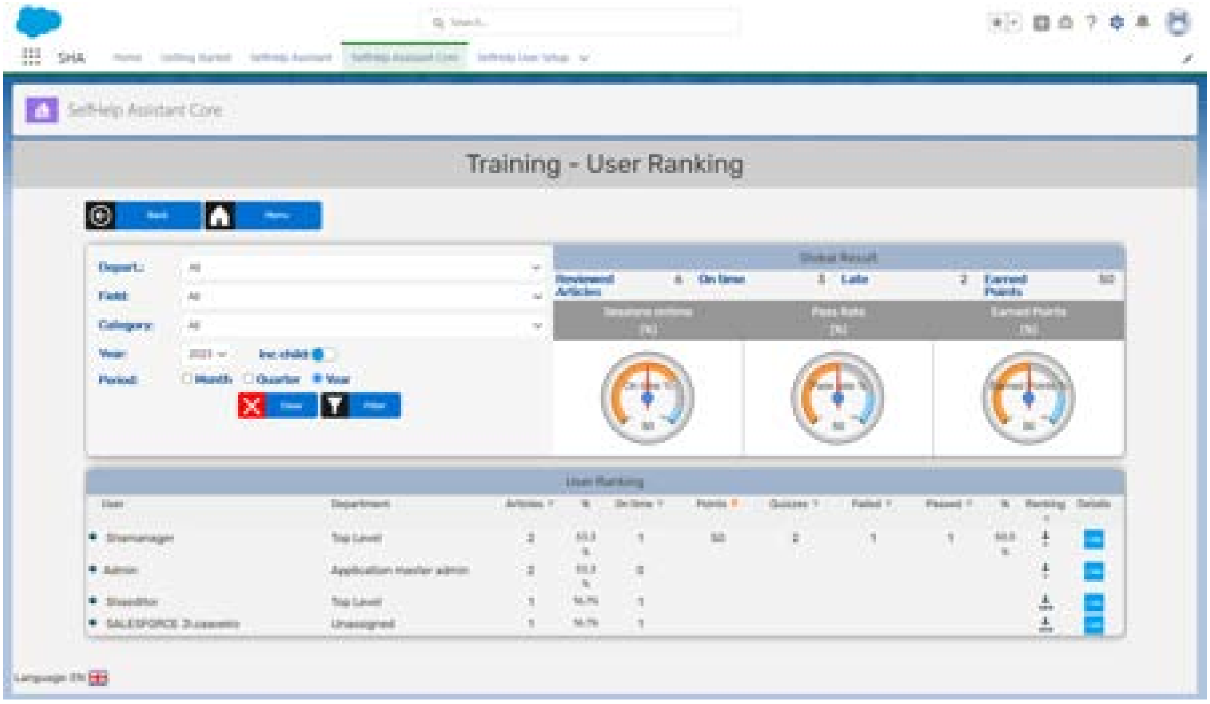
In general terms, the ranking feature considers two elements:

- # of articles reviewed on time
- # of points earned versus total points available.
- In case an article does not include any quiz and points, ranking is adjusted.

Ranking is based in four groups as follows:

Group A	Group B	Group C	Group D
			
The user completed at least 90% of the training articles on time, and earned at least 80% of the points offered	The user completed at least 70% of the items on time and earned at least 50% of the points offered. In case of not carrying out the review on time, this classification will be obtained if 100% of the points offered are obtained.	User completes less than 70% of the items on time or earned less than 50% of the points offered	The user did not complete any of the offered items on time or did not get any points (or they were not offered)

The look and feel of the ranking feature are quite familiar, with a filtering section on the top left, a performance summary on the top right and detailed data on the lower section.

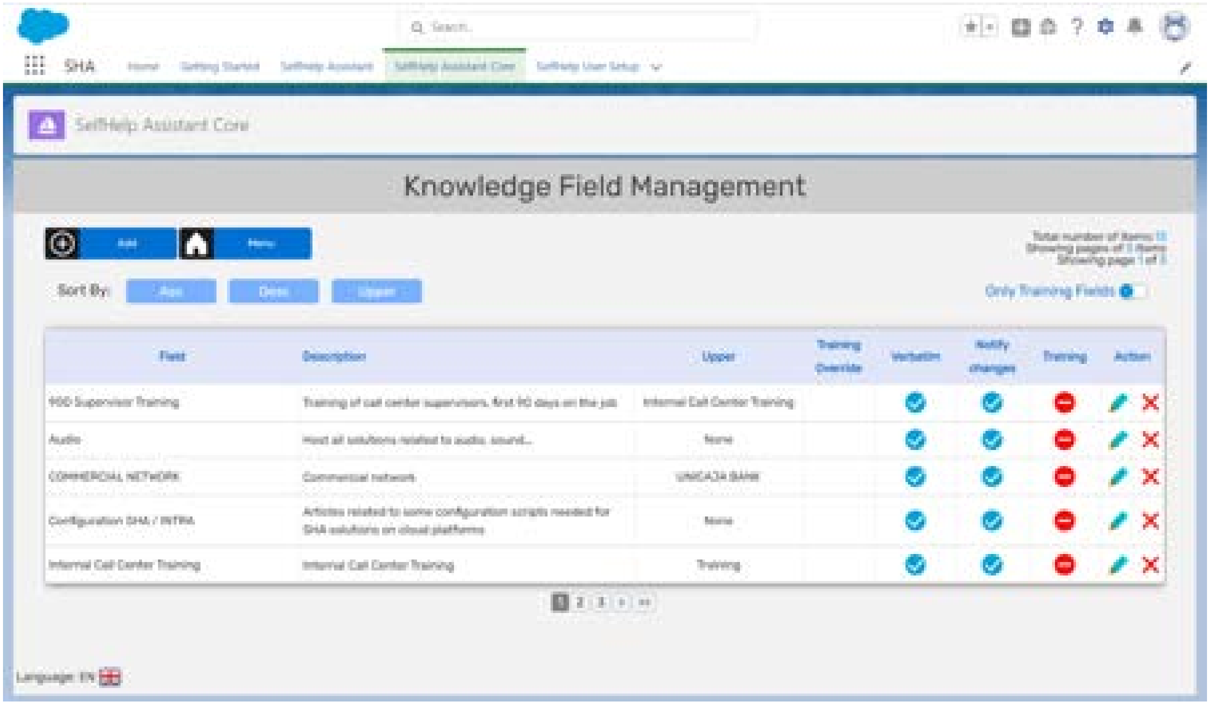


There are two aspects that are new in relation with previous section of INTRA, and it is worth to explain in a detailed way:

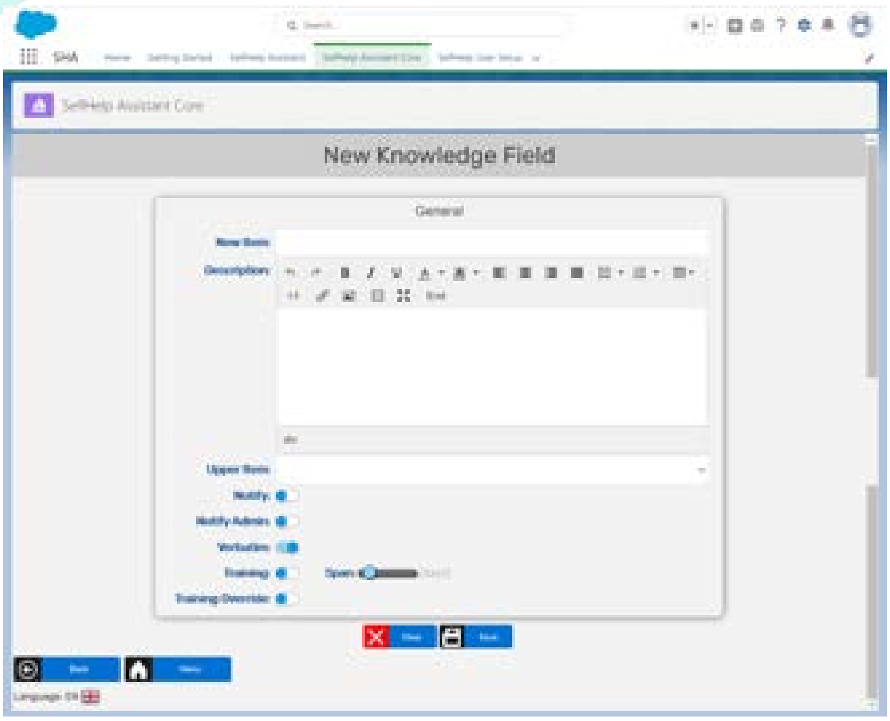
- Filter options: user department, article field/category are normal filters. Additionally both year (current -Y-, Y – 1 and Y -2) and period (Year – Quarter – Month) are available. Results will consider only training interaction matching those date criteria.
- Ranking sorting: ascending and descending sorting is available base on number or articles reviewed, # or articles reviewed on time, points earned, quizzes reviewed and quizzes passed.

4.- Knowledge Field Management

INTRA application organizes information by Knowledge Field or Domains. They can be managed from **Knowledge Field Management** section, accessible from the **Main Menu**.



By pressing the **Add** button, located in the upper left, you can add a new knowledge field.



The data entry form includes only several fields:

- first group, **new Item**, **description**, and **upper item**. The **upper** field allows to nest items together, in a parent / child relationship. In this way, you can create Knowledge Areas that depend on others, to structure the information in more detail.
- second group includes two check boxes to confirm if notifications will be sent to the users with access to this Knowledge Field every time that a new article or an edition is activated, or to remove administrators from those notifications; another check box allows to capture visitors' comments on articles (verbatim);
- finally, training related check boxes define the knowledge field as "training" material, setting up the training length (time allowed since an article is activated until the user review it on training mode -span-), and check boxes that over rides user set up in terms of initial training: when activated any user with access to this field will be required to review articles under training mode, even if they are expert users.

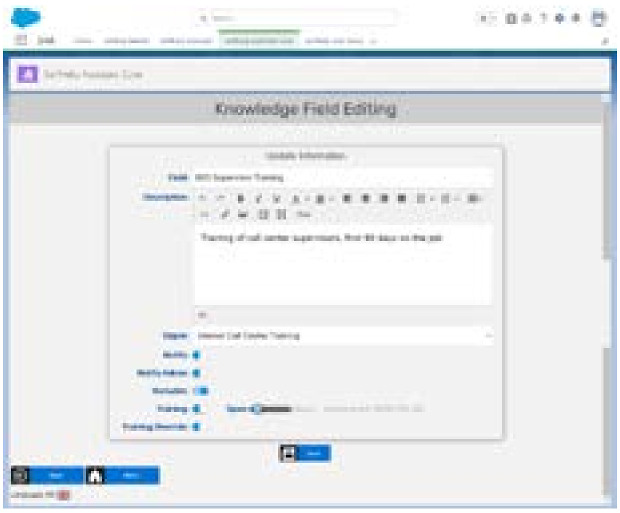
As a remark, when you create a Knowledge Field in a particular language, the system will clone that Field in all the languages loaded into the database, translated into each language, using the translation tool.

The recommendation of SHA is to carry out this nesting at the level of categories and not at the level of knowledge fields since the response of the system will be much faster. As in other sections previously described, **Clear** button allows you to correct any error and **Save** button proceeds to store the entry in the database (validations of the entries are made prior to their registration in the data table).

By pressing the **Save** button, when the system validation has been carried out satisfactorily, you will be allowed to edit the data again, to correct any content error that may have been committed, return to the **Knowledge Field Management** section, or return the Main menu.

It is also observed that Knowledge Field Management section presents two options for each item: **Edit** and **Delete**.

Although the operation of SHA is similar for all tables, you may press the **Edit** button to observe the associated procedure.



As shown in the image on the left, the fields of the record become editable, and changes are allowed.

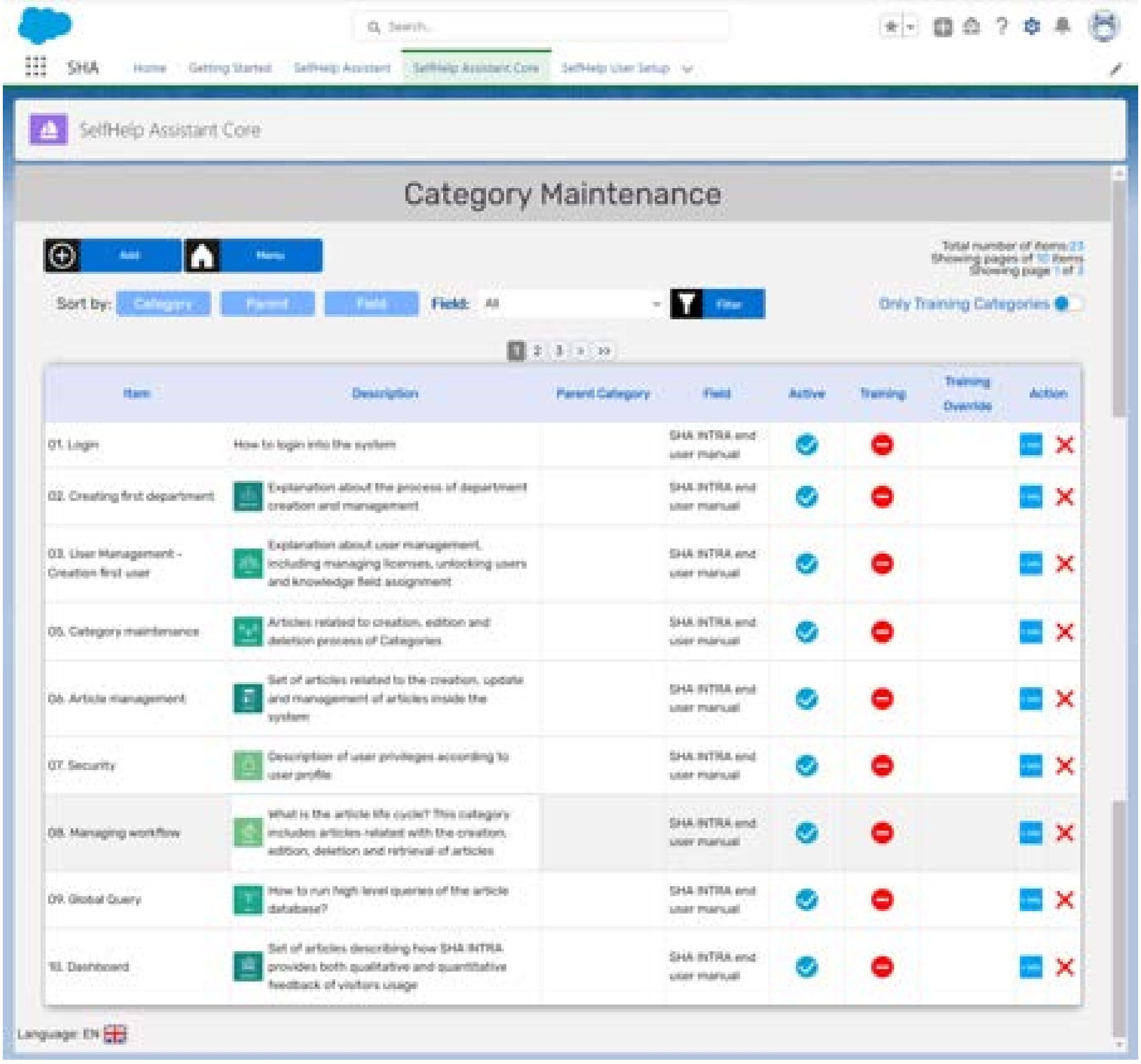
The operation, as we have already indicated, is very simple and pressing the **Save** button will store the changes.

Otherwise, the **Back** and **Menu** buttons on the lower left will allow you to return to the main window of the section or to the **Main Menu** of the application.

Finally, note that the operation of the Delete button is identical to those described above, although it is important to remark that when proceeding to delete a knowledge field, all those items that have been assigned to that field are updated to the **Deleted** status.

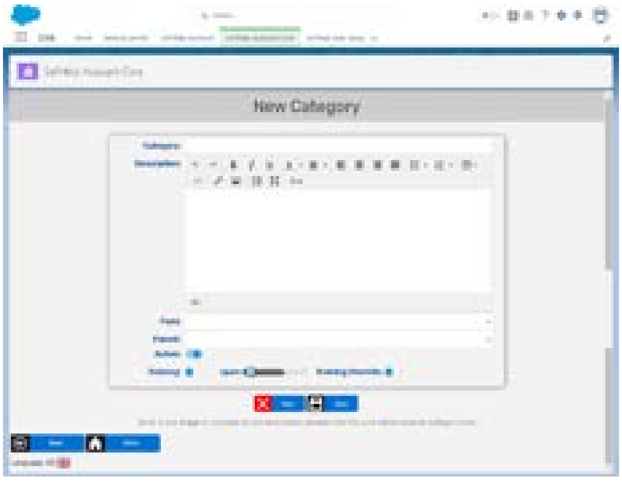
5.- Category Maintenance

Inside of each INTRA Knowledge Field, you can use Categories to organize on a much more detailed way the contents. They can be managed from **Category Maintenance** section, accessible from the **Main Menu**.



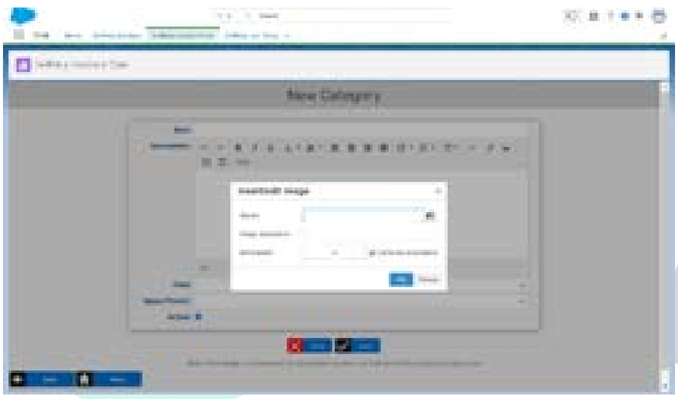
As in all the sections seen so far, by pressing the **Add** button, in the upper left part of the screen, you will access the data entry area.

The data entry is made through the fields of the form, making the system the internal validations of the information. As expected, the form has got **Clear** button, to correct the data entry, and **Save** to send the information to the server for storage.



Note: Field assignment is required/shown only on INTRA version.

The first time a knowledge field is entered, the **Upper Item** field will not appear, and only when more items are stored may the Parent / Child assignment be made.



An interesting feature is included on the add category screen. By click on the image icon from the WYSYG editor, you will be able to include an imagen that will be used as category icon on the Front-End section of the application.

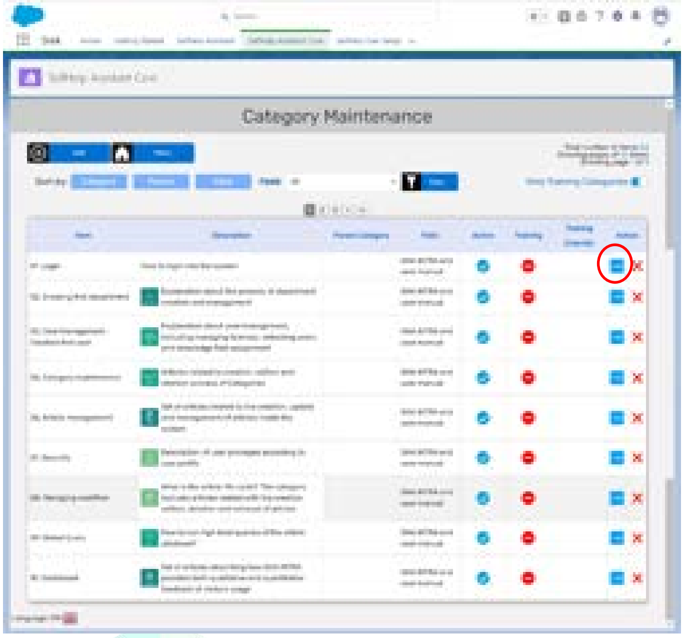
As already mentioned in the case of knowledge fields, categories can be marked as well as "training". This implies that all articles assigned to them will become mandatory under training mode. This selection as well as the training length (span) are defined when creating a new category.

Pressing the **Save** button you will receive the corresponding confirmation message when the data has been saved successfully, being able to return to the **Category Management** section or the **Main Menu**.

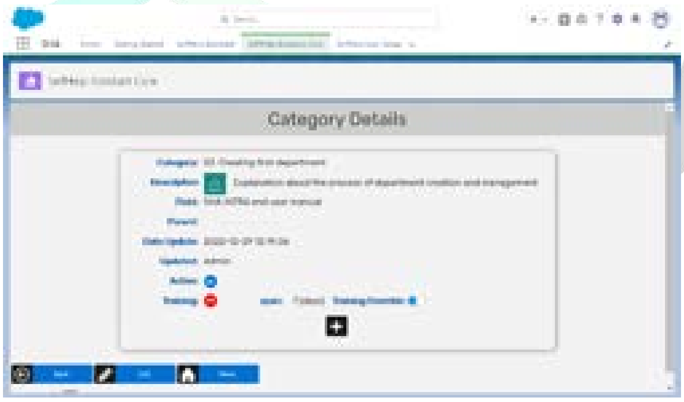
There is also a drop box at the top that allows to filter categories of a particular knowledge field.

When a category is deleted, all the articles linked to that category are updated to the **Deleted** status, so they will not show the information of that category from that moment onwards.

As you may expect, categories introduced on the database may be edited as well. To do so, you will have to access the details view from the Category section main screen.



The icon "+info" will give access to the Edit Category screen as shown in the following picture.



In the Category Details screen you can see all the data inputs related with the item.

You may notice the presence of ➕ icon that will expand a list of articles created within that category. The length of that list is defined in the Configuration section of the system.

Finally, by pressing the **Edit** button you will access the category edition screen: the logic is the same as in any other sections. You can modify any field, correct any input, and save the changes.

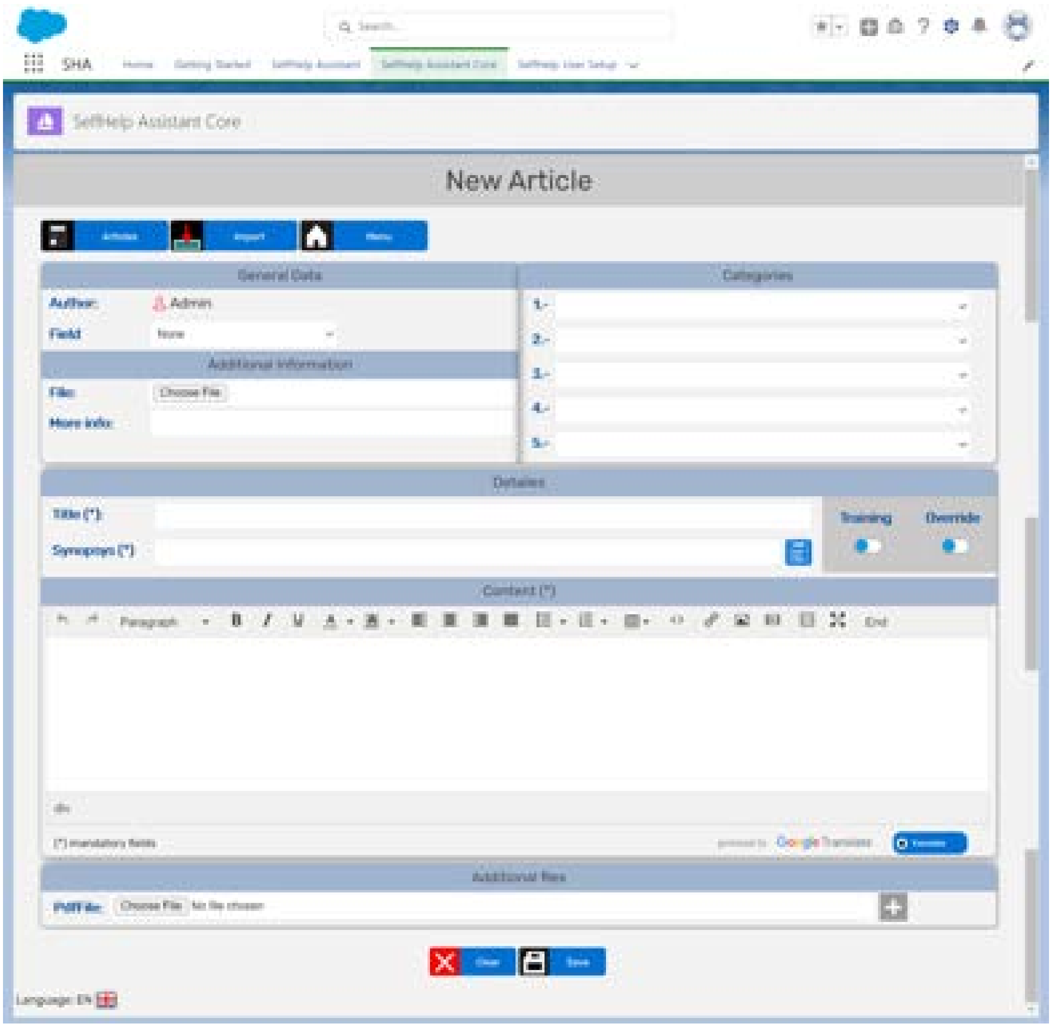
6.- Creating articles

So far, you have taken the following steps:

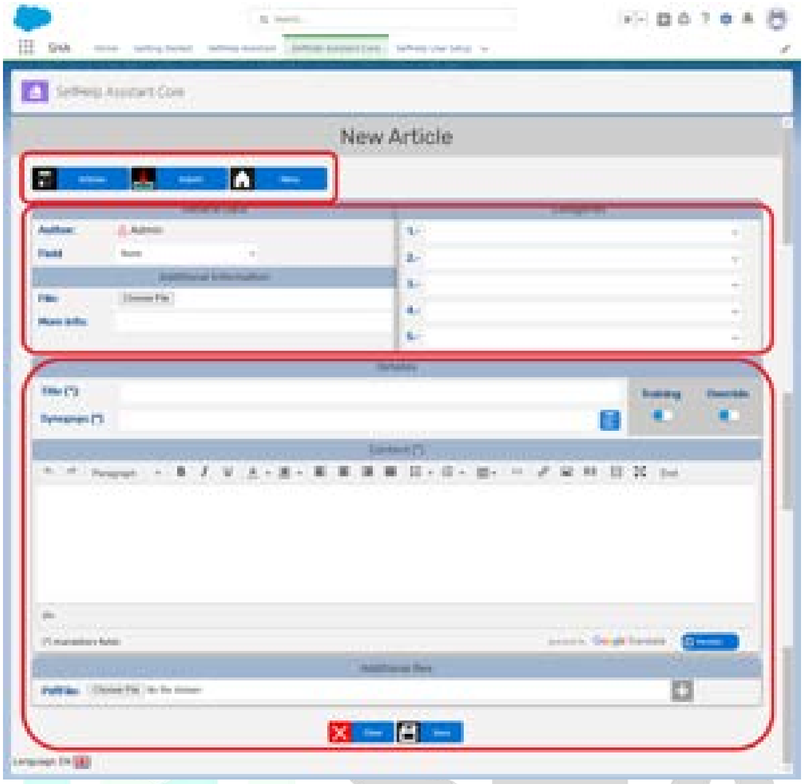
1) Creation of Departments, necessary to assign the users of the tool to them.
2) Creation of Users, who will be responsible for the exploitation of the tool with its different access profiles.
3) Creation of Knowledge Fields, where different articles will be framed.
4) Creation of Categories, for the most effective grouping and classification of all contents.

At this point, you are in conditions to create your first article. As you may be expecting, when clicking into the **Articles** icon in the **Main Menu**, an error message will be shown as table is empty. Press on the **Add** button to create the first article.

This screen is divided into several sections that we will explain below:



At the top there is the Navigation menu is at the top, with the **Articles, Import** and **Menu** buttons, to return to the **Content Management** section, import and article from another market database and the **Main Menu.**

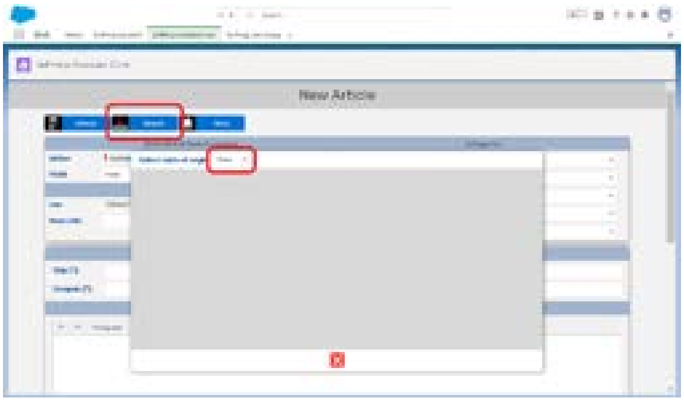


The upper area right after the navigation section shows information needed to get new article assigned to Knowledge Field and its categories, as well as some additional picture (2) that may be included as a master image.

The bottom area is designed for data entry: title (**Title**), synopsis (**Synopsis**) and description (**Content**). There are two check boxes located on the right side to mark the article as "training" mandatory and to override training status of users, if needed. **Clear** and **Save** are located in the bottom center of this area, with identical operation of those described so far in previous sections.

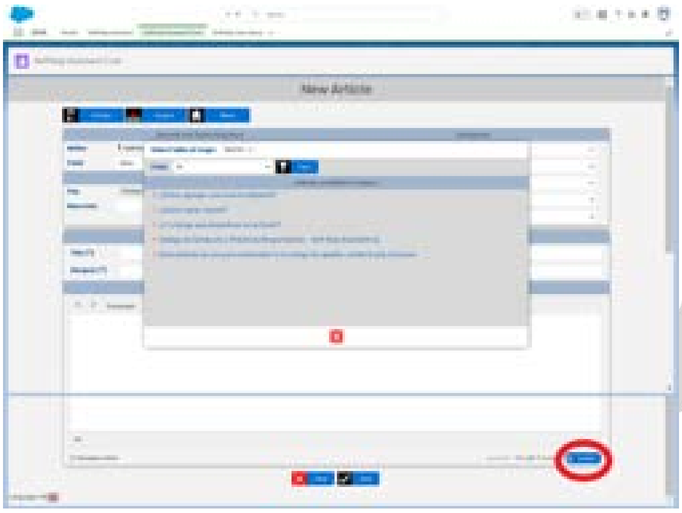
Apart from image field included on left section, you can add as many pictures as you want to the content section, by using the WYSWYG editor. Allowed pictures are jpeg, gif and png, and the file size is established in the **Configuration** section of SHA.

Inside the WYSWYG editor, there is a template loader, that allows to incorporate some of the predefined templates to your new article. Those templates are produced in the backend of the system. There are some basic templates, and complicated ones may be inserted as required as well.



Before proceeding to the main screen of the Content section, let's explore the import features of SHA INTRA. If the button **Import** is pressed when the add article section is active, a pop-up will appear with a drop box that allows to select any of the databases available in other markets.

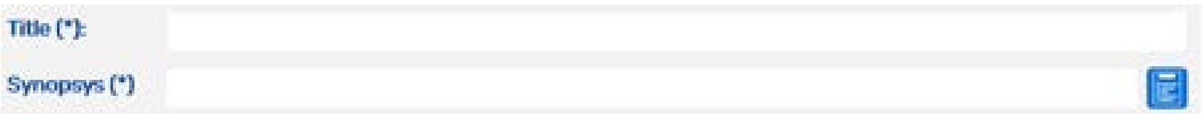
When a market is selected, and list with the available articles is shown, with navigation features as well, and any article may be selected from translation.



Once any article is selected, the fields Title, Synopsis and Content will be loaded in the original language, and by pressing the **Translate** button, the translation process will be run. All other fields will have to be filled as well.

Finally, when pressing **Save** the article will be translated as well as any troubleshooting tree coming for the original article. SHA INTRA controls internally the translation process as well as the associated workflow.

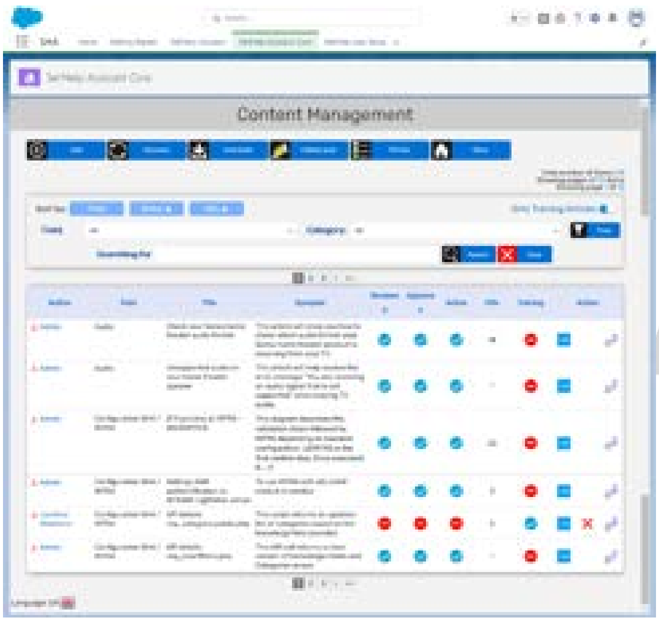
Additionally, you can see the presence of a button to the right of the synopsis field: it allows the automatic generation of the abstract (synopsis), once the information has been entered in the "content" field of the article. The size of that digest is configured at the server side. By default, it is set to 5 sentences.



This summary is obtained through the implementation of the “textrank” algorithm, base don Google’s “pagerank” algorithm.

The synopsis obtained by this method can be reversed through the “undo” button that appears when executing this script (see image on the left).

Once article data is completed, by pressing the **Save** button, the appropriate checks are made and in case of success the confirmation screen is displayed. From there, through the lower left menu you can return to the **Content Management** section or **the Main Menu**. When returning to **Content Management** section, you will see:



- A navigation menu on the top,
- An area reserved for the ordering of the results,
- A filter section, where Knowledge Field and Categories may be selected to show a restricted view,
- A search input to allow for specific searches into the articles table, and
- An area with the list of articles included in the database.

Let's dig a little deeper into each of these areas. The navigation menu has six buttons: **Add**, which allows to continue adding records, **Recovery**, which will allow to recover previously deleted articles, **Download**, which allows to export the contents of the Content table to Excel, **FdBackPool** where feedback provided by visitors is managed, **My Work** where each author may review the feedback received and, **Menu** to return to the **Main Menu**.

Next section on the screen allows to sort the articles by **Knowledge Field**, by Author (**Writer**) or by the number of visits received (**Hits**) at the level of Front End. Also, you can search for a specific article by entering the words to search within the **Searching For** box. The search will be executed by pressing the **Search** button. The **Clear** button, as expected, deletes the content of the search box.

Finally, results section shows the following information for each article:

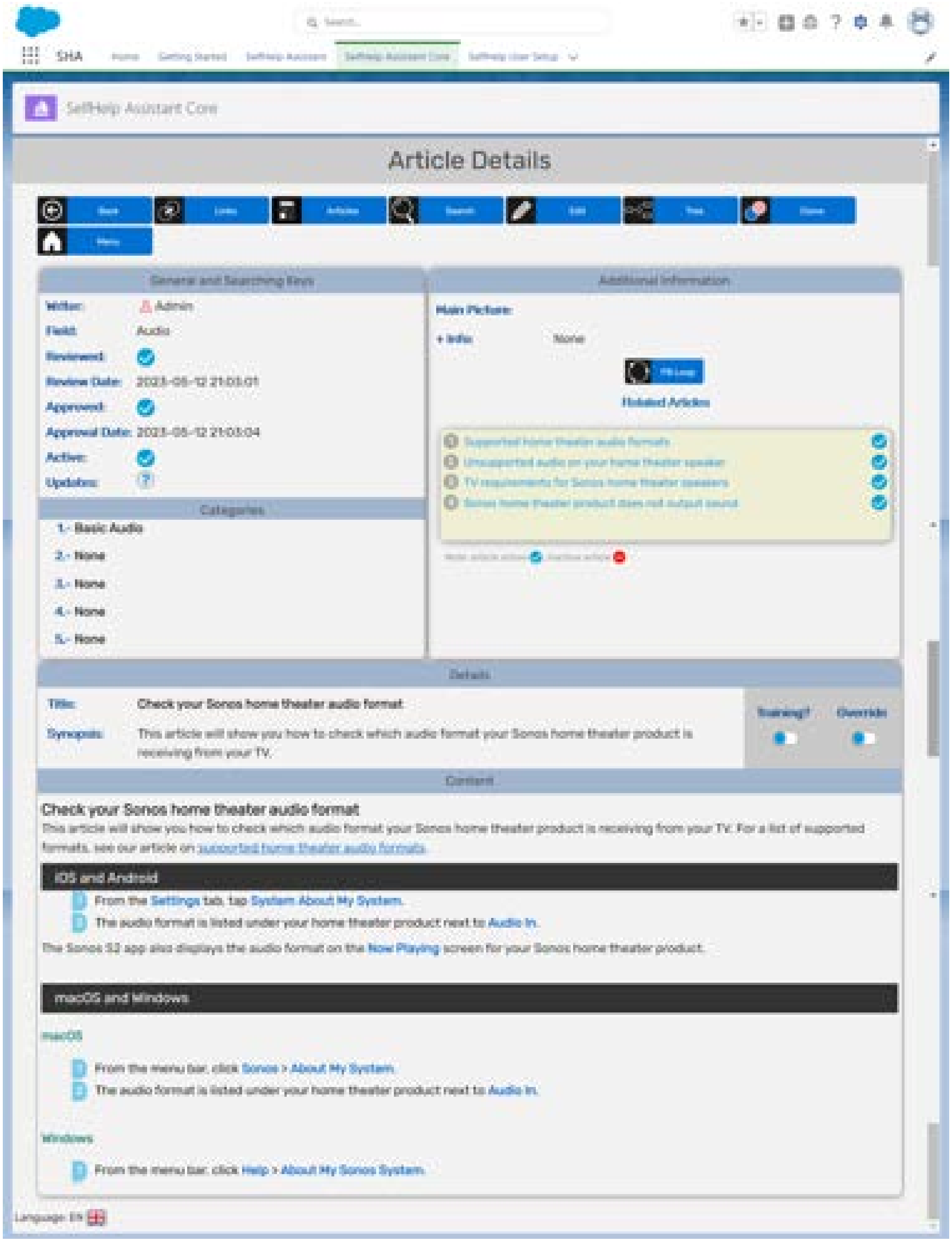
- Author
- Knowledge Area
- Title
- Synopsis
- Workflow status (3)
    - Revised Article
    - Approved Article
    - or Active Article
- Visits received
- Training article
- Possible actions:
    - See details (**Details**)
    - Delete (**Delete**), but only visible if the status of the article in Workflow is not active.
    - **Transfer**, to change ownership of the article

Note 2: supported formats are **jpeg, png y gif**
Note 3: see **Workflow** section for a detailed explanation

There are two paging lines (top and bottom) to move back and forth between pages.

Continuing with the different options available, you may now access the review screen of a specific article, by clicking on the **Details** button.

The following image shows the appearance of the Article Details screen:



In the example shown in the image, you can see that the article is reviewed (**Reviewed**), approved (**Approved**) and active (**Active**), so dates are associated to those events.

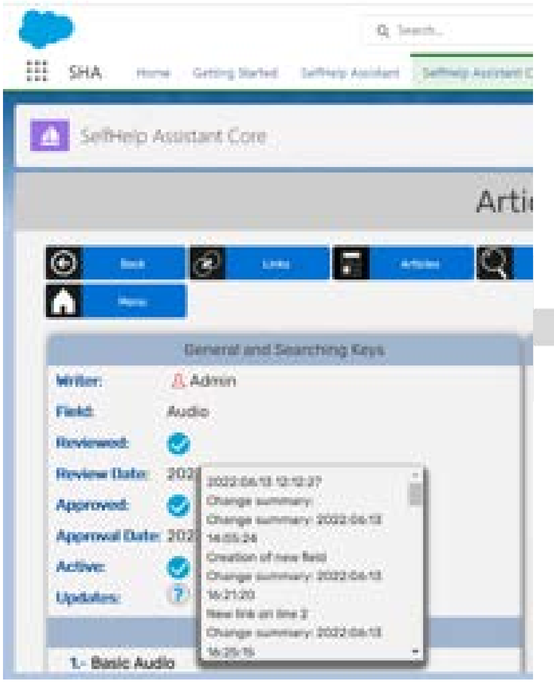
There is also an action button (**Close the Loop**) that will be explained later in the **Dashboard** section.

Regarding the top menu, six different options are shown:

1) **Back**: pressing this button returns to the previous page. Although within the **Content Management** section you would return to the beginning of the section, this is not the case when accessing the details of an article.

2) **Links**: this feature allows to interconnect articles among them.
3) **Articles**: this button returns us to the beginning of the **Content Management** section.
4) **Search**: this button takes you directly to the **Query** section of the application.
5) **Edit**: through this button you access the option to edit the content of the article.
6) **Tree**: pressing this button shows the tree decision associated with the article.
7) **Menu**: finally, this button returns us to the **Main Menu**.

A very important feature included in SHA is the version control, on both single language and multilanguage deployments: when an article is edited or imported into one language from any other language, the SHA triggers the version control. This way, any change made in the article, or on the root article or in any copy is reported and creates an alert system for article owners, requesting article review in the language the owner is responsible for. There is not automatic update of changes into any other copy as they may not be necessary / required in any of the other languages the article may be published.

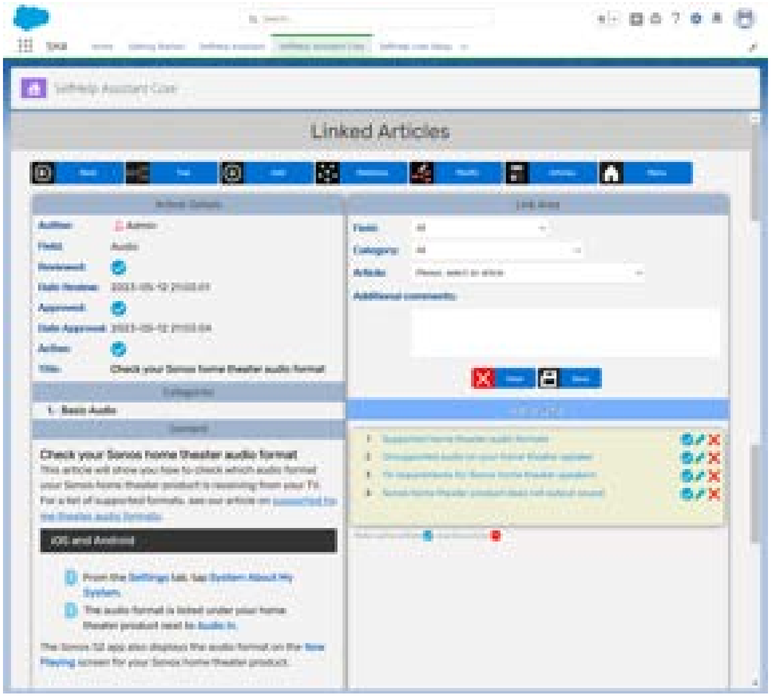


In the image on the left you can see how SHA reports modification through the change log into the **View** content details section.

Because of its importance, we will delve into the **Links**, **Edit** and **Tree** buttons.

<u>Article links</u>

Pressing Links button displays the related articles management screen. Its appearance is shown in the following image:



You are already familiar with the left side of the screen. Detailed item information is displayed.

On the right side there is an area to filter, facilitating the selection of articles. The selected article will be added as a relation of the displayed article.

Articles can be filtered both by Knowledge Area and/or by Category; the item dropdown list will display those that match the selection. When selecting one of those articles, its title and synopsis are displayed on the screen.

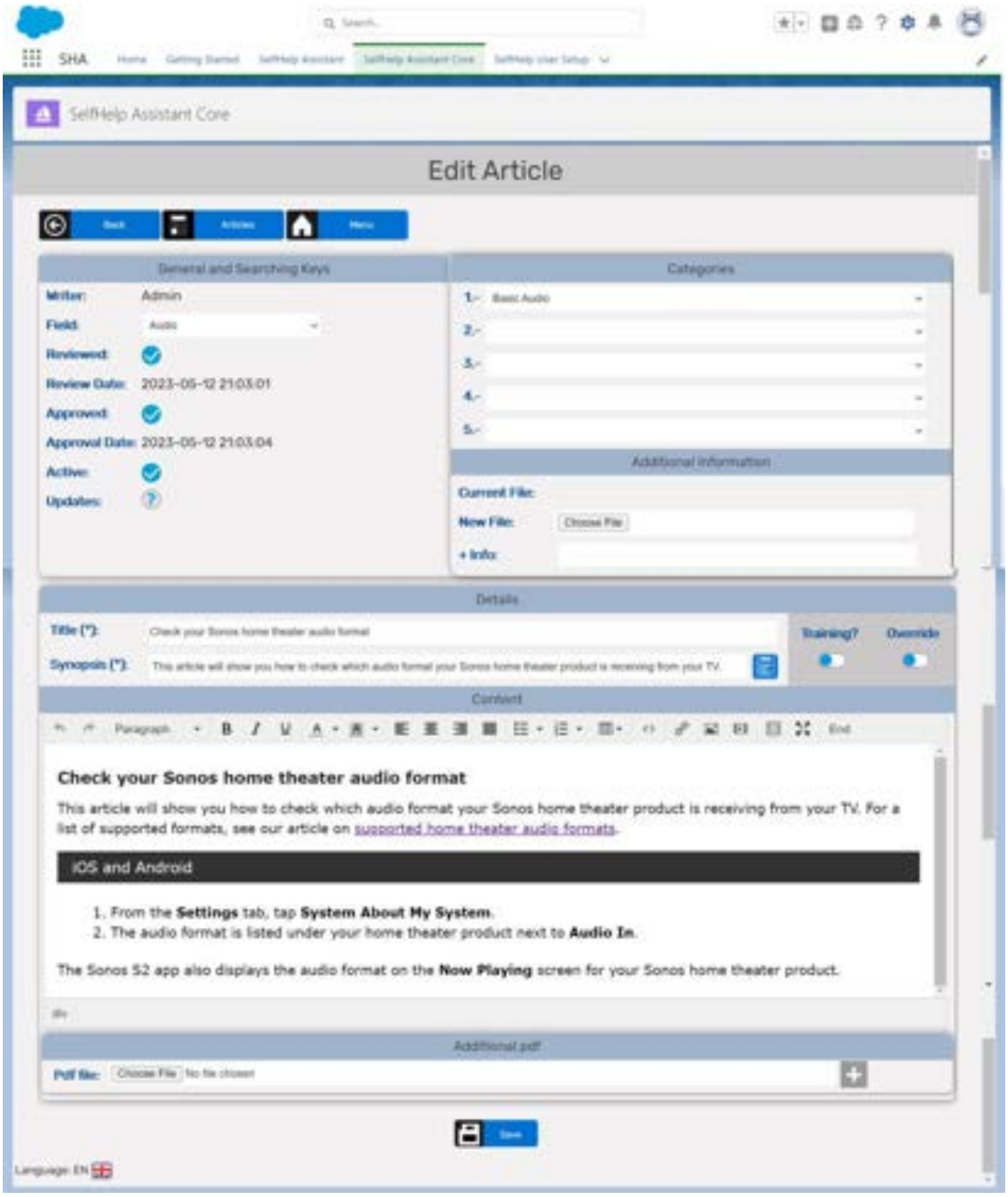
If you want to add additional comments to the relationship, you can include them in the field provided for this purpose. The **Save** button stores the information in the database.

The **Delete** button restores the values of the filters as well as the information of the article to be related.

Once article is added, it is information is added to the “Active Links” section, together with 3 small icons: first one indicates status of the added article (active/inactive); the two additional icons allow you to edit the comments entered in the relationship or directly delete the relationship.

You can include as many related articles as you want.

Article edition



The image above shows the screen once the **Edit** button has been pressed. Everything is familiar to us since it is practically the same information we have seen so far.

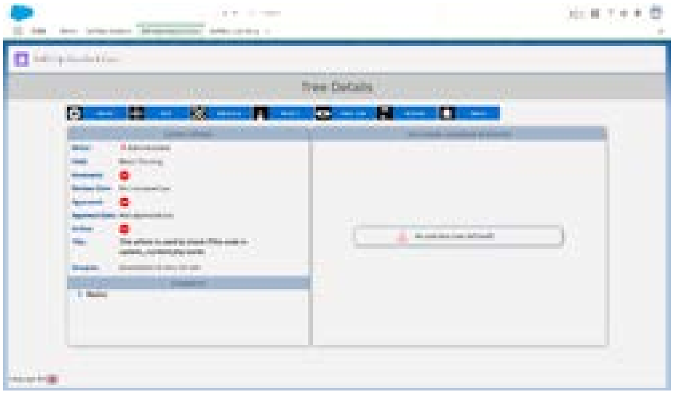
As an additional comment it can be noted that it is allowed to change the image associated with the article, as well as the external link. The other fields are also editable and can be modified by the user.

The **Save** button records the changes, but also modifies the status of the Workflow because it automatically changes the item to **Not Active**.

The top menu allows you to view the article again (**View**) or return to the beginning of the Content Management section (**Articles**) or the Main Menu (**Menu**).

Let's see the operation of the **Tree** button below.

Article Tree



The left section shows the information related to Workflow status as well as the creator of the article, title, synopsis, and categories to which it has been assigned.

The right section contains an error message, in which you are told that no *Decision Tree* has yet been defined for the article.

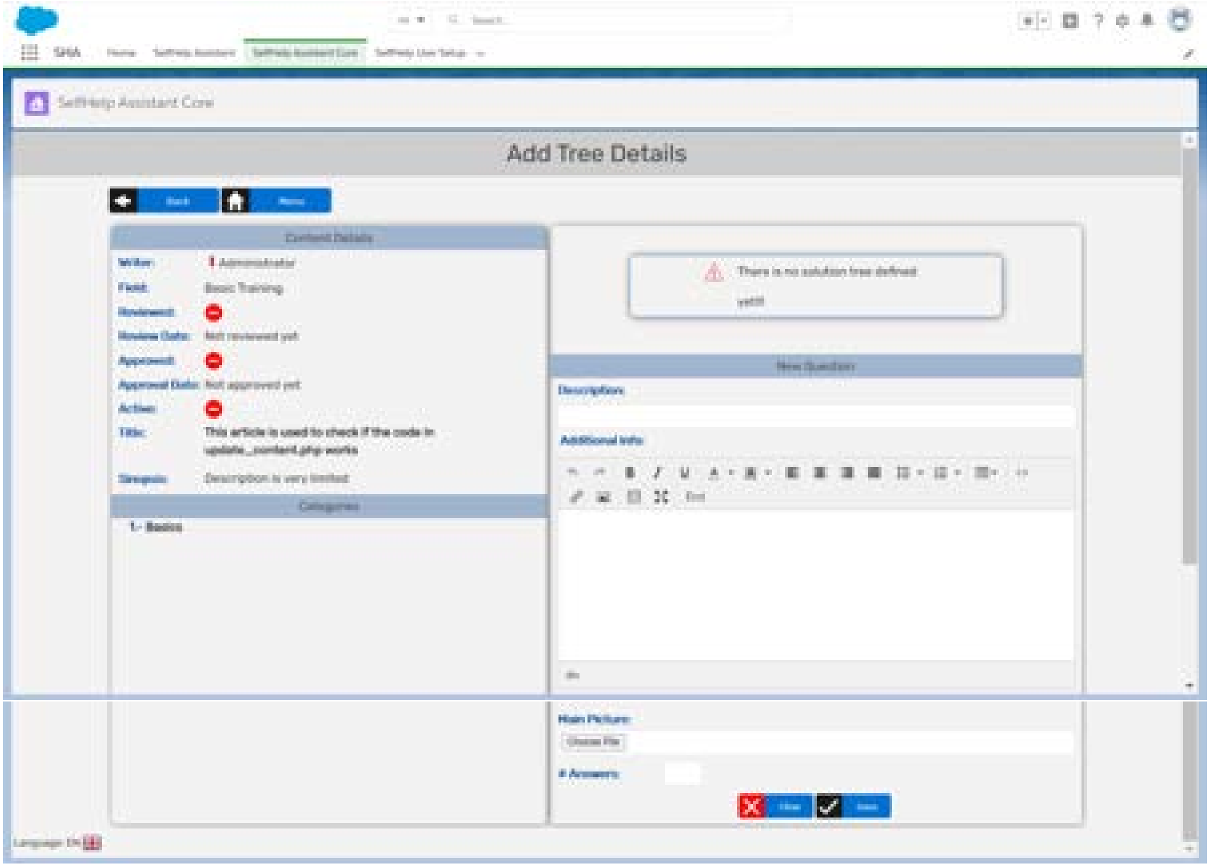
The top navigation menu contains the elements necessary for its creation. It consists of six action buttons:

1) **Details**: pressing this button returns article details.
2) **Add**: this button allows to add a question or item to the *Decision Tree* of the article.
3) **Relations**: by clicking on this button you can perform the linkage between each answer and the successor question in the *Decision Tree*.
4) **Modify**: this button allows to delete items from the *Decision Tree*.
5) **View Tree**: pressing this button will show the *Decision Tree* as a whole, for review.
6) **Articles**: return button to articles list.
7) **Menu**: finally, this button returns to the **Main Menu** of the application.

In the next section you may see how each button operates.

6.1.- Adding a new item

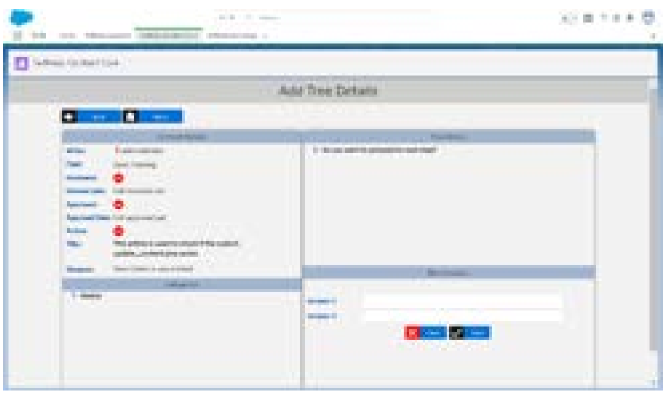
When you press the **Add** button, **New Question** section on the bottom right is displayed. It has four fields of information: the description of the question / item (**Description**), the explanatory information that we consider appropriate introduction (**Additional Info**), the main graphic material that you may want to incorporate (**Picture**) and the number of answers it will have **(# Answers**).



As a side note, please remember that the WYSWYG editor will allow you on include as many supporting pictures as you need inside the Additional Info text box.

The information entered will be validated by the system, with at least the **Description** and **# Answers** fields being mandatory.

As always, **Clear** button allows you to correct the entries made in the fields, and **Save** button records the information in the database. When pressing the **Save** button, the application automatically requires the introduction of the answers assigned to the question / item, as shown in the figure on the right.

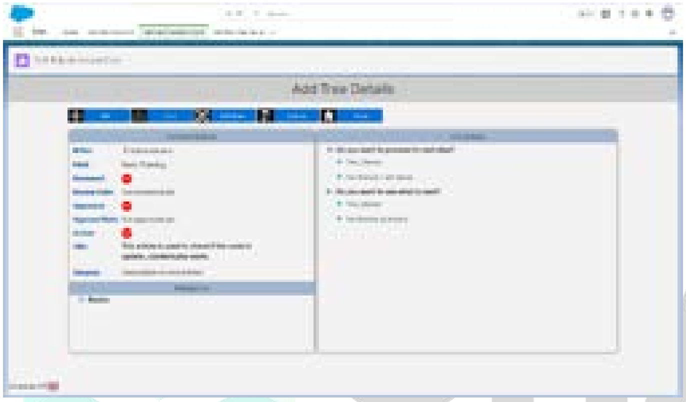


It is important to note that the # Answers field support a medium size content. If more extensive information is required, it can be included when defining the relationships between elements within the "*Decision Tree*".

As it happens in other sections of the application, the **Clear** and **Save** buttons allow to correct and register the information in the database respectively.

If for any reason, the user presses the **Save** button without having entered the answers, the system will allow to correct the situation in two ways: either by modifying the Tree, in the **Modify** option, which we will see later, or by entering a new question, requesting that the blank answers be completed.

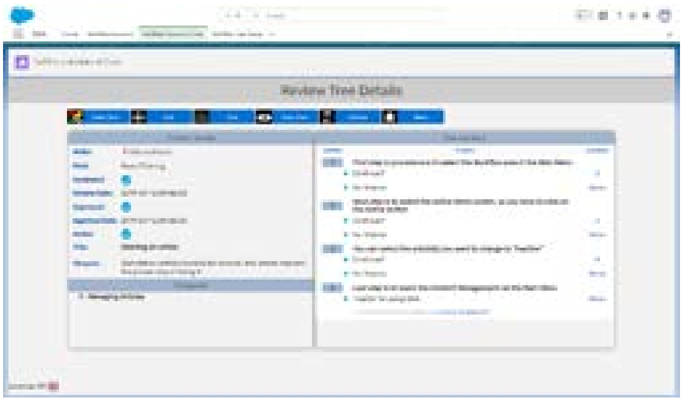
By repeating this procedure, you can enter as many questions / items as necessary to define the *Decision Tree* of each article.



To simplify this manual, it shows how the screen would appear when two questions have been introduced in the article.

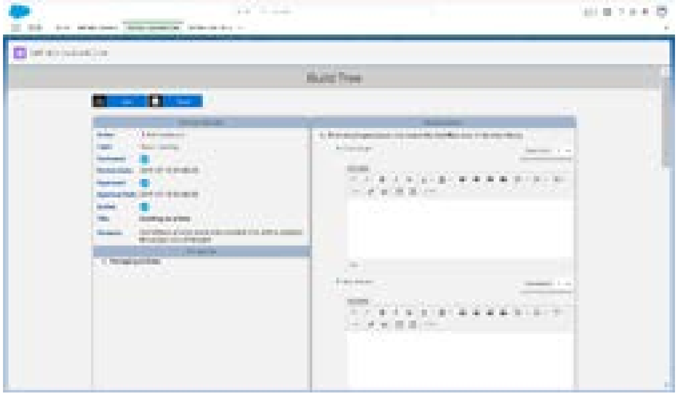
The article has 2 questions and 4 answers, however, until now we have not introduced any predecessor / successor relationship between them, so no *Decision Tree* is created.

To perform this operation, we must press the **Relations** button of the navigation menu located at the top.



When pressing Relations we will get a view of the current tree structure, with questions, answers and linkage between answers and questions, if any. In the case of a new tree creation, we will see the list of all items with no relationships among them.

By clicking on the **Build Tree** button, we will access to the relationship's editor, as shown below.



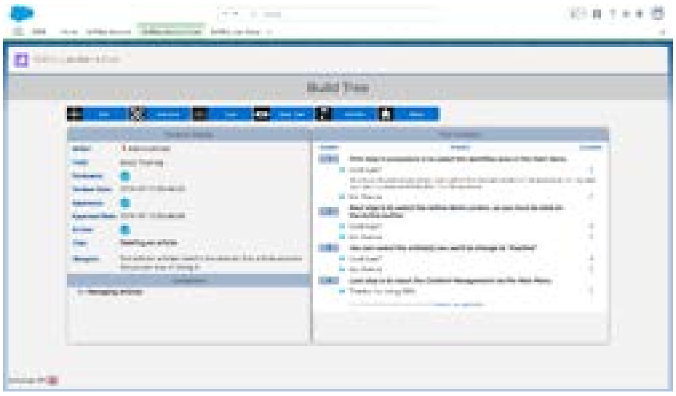
The left part of the screen shows familiar information: data of workflow, title, symposium, and categories to which the article is associated.

The right part shows the relationship of all the questions created for that article, as well as the answers associated with each question. Also, for each response, it shows two data fields. On one hand the successor, or question that would be shown after the user selects the previous response (**Successor**), and on the other a field of additional comments associated with that response. By assigning successors to the different questions and answers, the "Decision Tree" of each article is constructed.

The **Comments** field is displayed in the Front End when the visitor selects the associated response and is a good place to include additional information about the response, for example, including a greater level of detail as shown on the left.

The system is configured in such a way that each response can only be assigned to the value 0 (without successor) or to any question within the tree.

As always, this screen has the **Clear** and **Save** buttons at the bottom.



Once all the necessary data have been filled in, by pressing the **Save** button, the relations between questions are updated and a summary of them is shown, as can be seen in the left image.

Each answer shows its successor as well as the associated additional information. In this example, an image has been embedded into the additional info section for question #2.

The top navigation menu, in addition to allowing to return to the beginning of the **Content Management** section or the **Main Menu**, incorporates the **Add**, **Relations, Tree** and **View Tree** buttons: the first allows to continue adding more questions to the *Decision Tree*; the second one allows to change the existing relationships between the questions, the third one allows to see in a single screen all the question and answers, and last but not least, the fourth allows to simulate how the tree will work, in the same way as the users of the Front End.

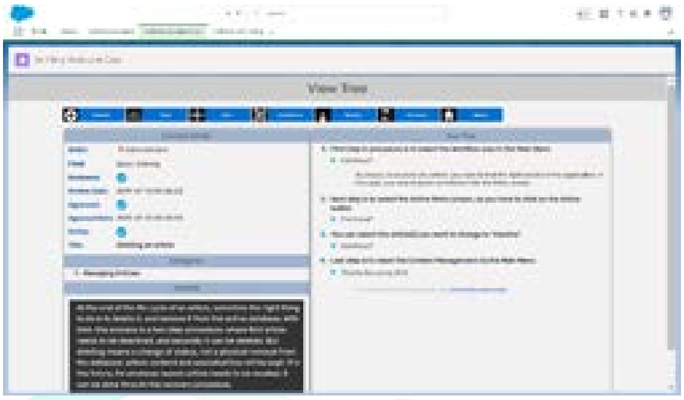
Let's see, how the **View Tree** simulation works: when you press this button, the application shows us the following screen:

information of the article, as in the previous screens. However, in the right section we observe that we are presented with the first question / item, with its answers / alternatives accompanied by a radio button to select the option you prefer.

At the end of this section buttons **Clear** (to erase radio buttons) and **More** (to progress on the *Decision Tree*) appear.

If by mistake the user presses the **More** button if no option has been selected, the application shows the corresponding error message (left image).

The **Back** button will allow you to return to the previous screen.



You can continue navigating the tree associated with the article, until some of the endpoints are reached.

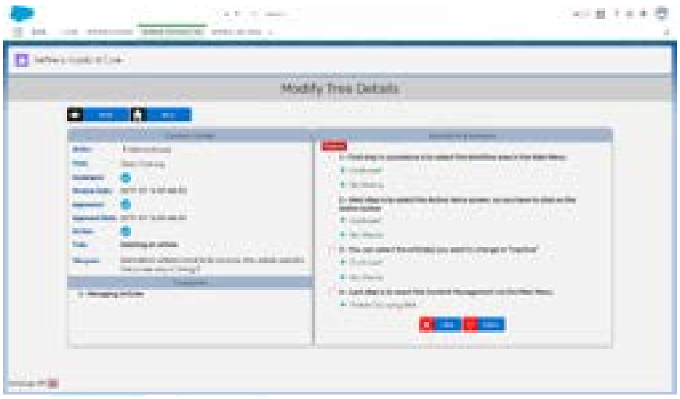
In this way you can check the correct functioning of the relationships between questions, and if necessary, correct them before article is activated at workflow section for final use in Front End.

6.2.- Modifying Decision Tree branches

If it is necessary to modify the content of the questions and answers that make up the *Decision tree* of an article, there are two available within SHA:

1) Remove questions from the tree and reconstruct it later.
2) Modify the contents of them without eliminating them.

The **Modify** button in the navigation menu within the **Content Management** section allows us to eliminate questions and answers from the database. It is accessible in the **Tree** and **View Tree** screens of the section, and its appearance is as follows:

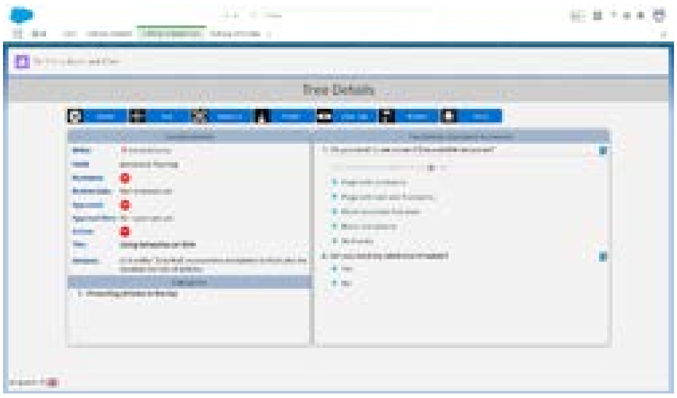


Again, general information about the article is shown in the left section of the screen, while in the right section all the questions are listed, with their respective answers.

A checkbox appears next to each question. When the user presses a checkbox, by pressing the **Delete** button, the question and its answers are deleted.

As expected, the **Clear** button allows you to correct any selection made.

It is important to note that the application, in case the article had an *Active* status in workflow, automatically changes this status to *Inactive*, showing at the bottom of the screen the message that the *Decision Tree must be rebuilt* since its structure has changed.

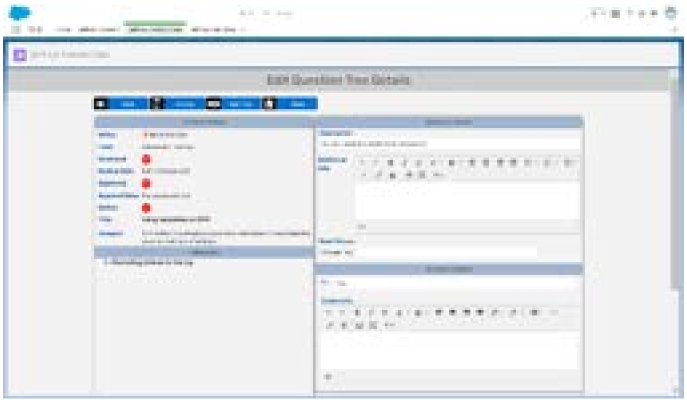


If what we want is to modify the content of the questions and their answers, but not eliminate any, the **Tree** option allows to perform such task. When an article is *Inactive*, the window looks like this:

In this view of the tree, you can see questions, answers and thumbs of the associated images of each question. Also, next to each question appears an **Edit** icon, which allows you to edit the content of the question and its answers.

To understand how it works, you may click on the icon associated with the second question.

As always, the left section of the screen shows us the general information of the article, while on the right, and in editing mode we must see all the questions with their answers, the images associated with each question and two action buttons:



- First button allows to add a new support picture.

- Second one, deletes the picture associated to the question, not being necessary to add any additional photograph.

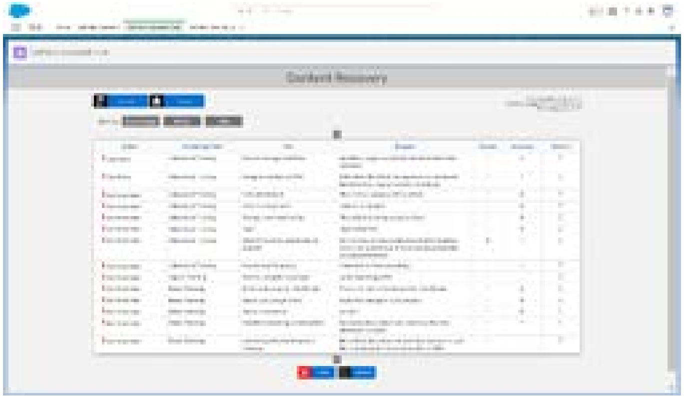
All the text fields on the right of the screen are editable, and you can make the modifications that he wishes in them.

As always, the **Clear** and **Save** buttons allow to correct the changes made or save them in the database.

Pressing **Save** button will generate the corresponding confirmation screen.

As a final remark, you can modify the content introduced at the relationship section (**Relations**) by returning any time to that section for any article.

6.3.- Recovering Articles



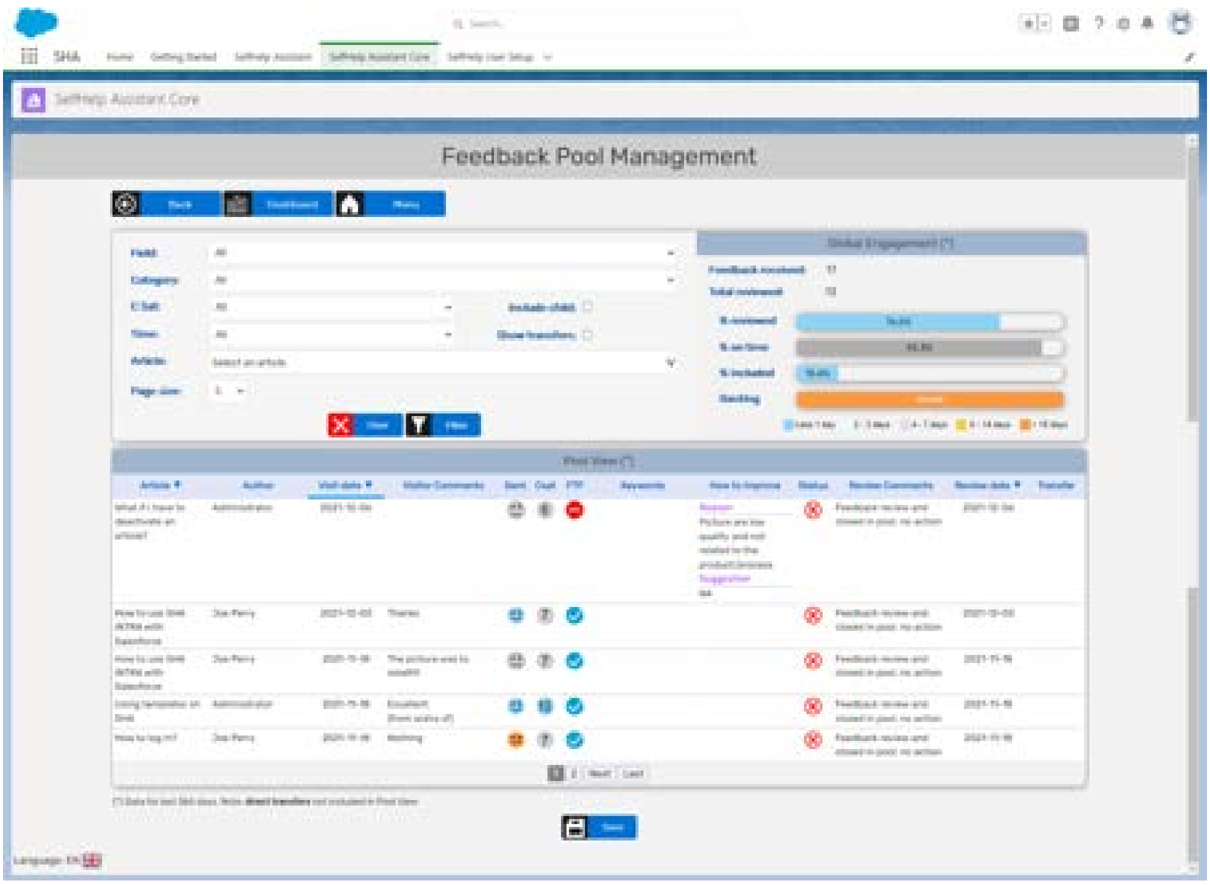
When an article is deleted, is marked as that, but remains physically on the database. For that reason, article may be restored if required through the **Recovery** section. The access button is located at the navigation menu on **Content Management** section and look of the screen is shown on the picture at the left.

Basically, the system provides a list of all articles marked as deleted, together with a check box for each on them. By clicking that check box and pressing the **Save** button, articles will be restored and ready. A recovery article will have to go through workflow process again. The rest of elements of this section are self-explanatory.

6.4.- Managing suggestions (Fdback Pool)

Once survey form is filled by a visitor, and qualitative information is provided, such information is managed in this section of INTRA. The main objective is to allow backend users, with the right permit, to review the feedback and decide if:

a) That feedback is not relevant for the article content.
b) That feedback is relevant and may be considered by author to create a new version of the article.
c) Those content writers assigned to departments with transfer field set to active will receive directly the suggestions on their working area (see Department's chapter).



When feedback provided is considered not relevant, process can be ended by clicking on the **Close** checkbox located in the **Status** column.

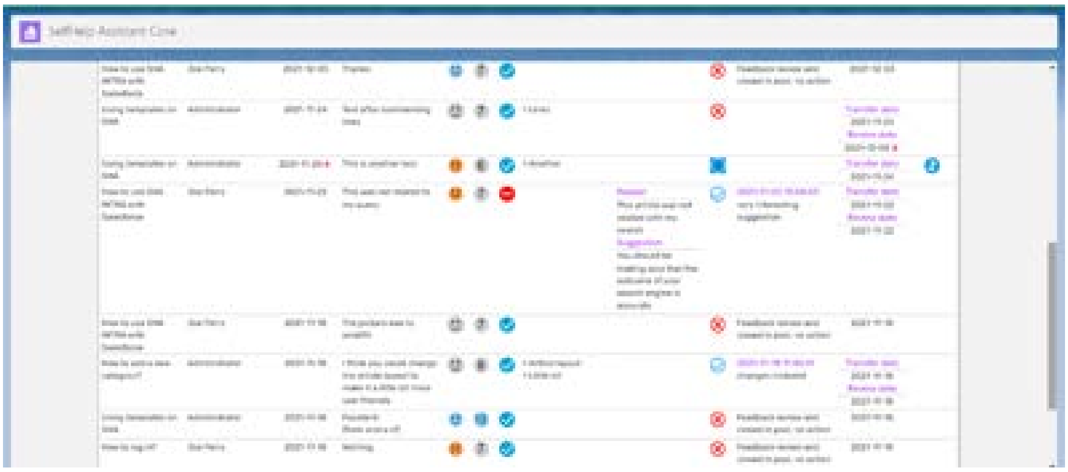
On the other hand, if the feedback is considered relevant and worth to be sent to the article owner, **Transfer** check box must be clicked.

Changes will take place once **Save** button is pressed, being reflected automatically on the screen.

There are two aspects to consider on the filter section, located at the top left of the screen:

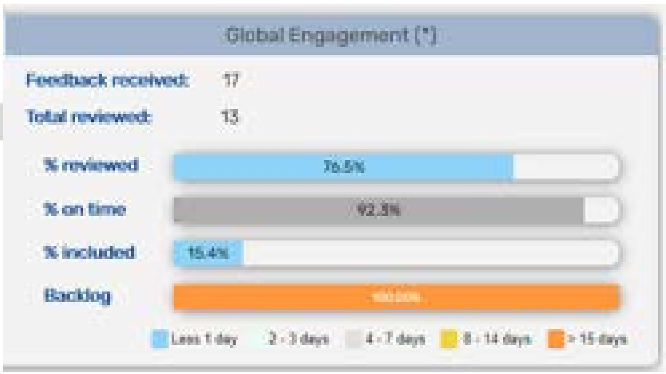
- List length may be changed.

- By checking the Show Transfer box, feedback already transfer to article owners is shown on screen as well:



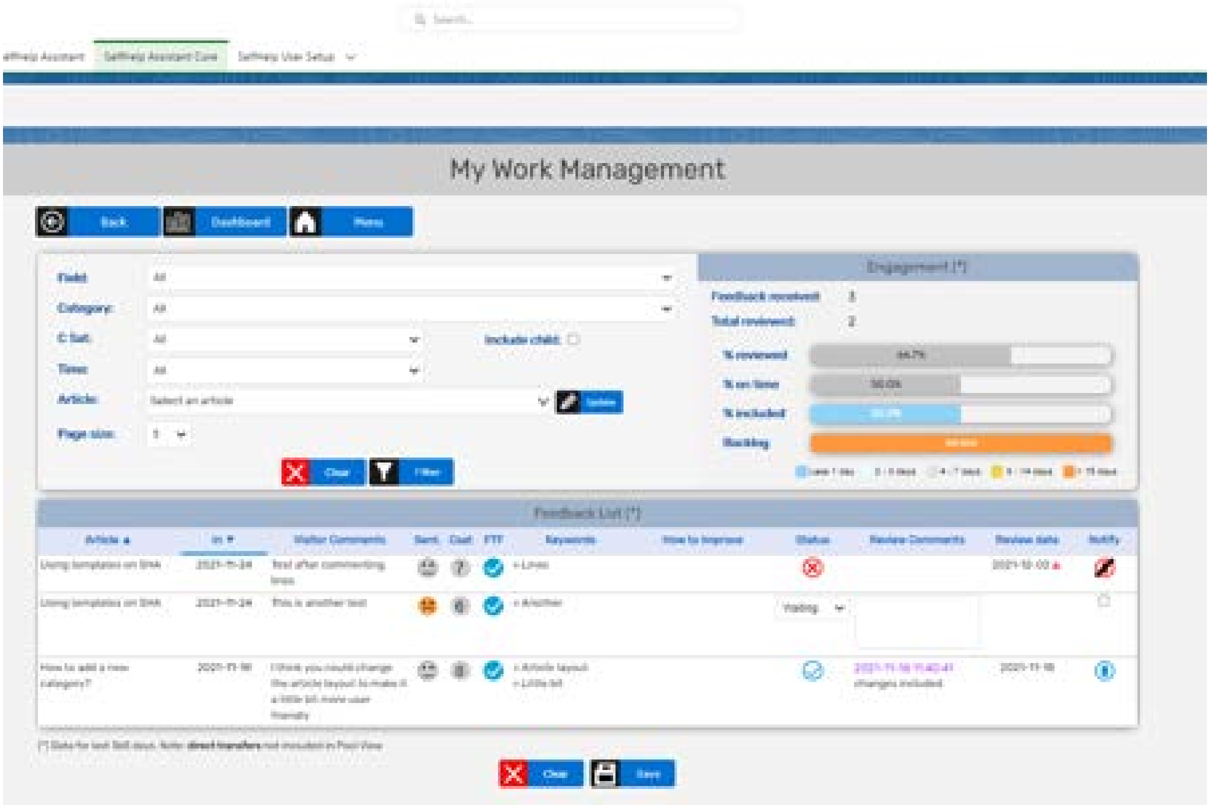
There are three status options:
- Waiting for action.
- Rejected, not considered.
- Considered and included.

Likewise, the degree of acceptance of received suggestions is shown in the upper right part of the screen, measured from two aspects: time passed since visitor send his suggestion and the % of acceptance/rejection of them.



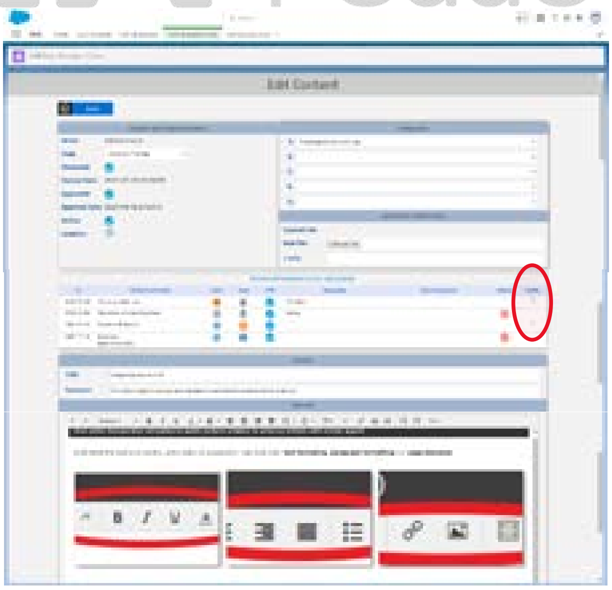
Until now, the most relevant aspects of the global management of Suggestions / Comments / Feedback from visitors have been reviewed, from an aggregate point of view. But each author has access to his own view, which is called **My Work**. In it you can see all the assigned interactions, either directly, because they are framed in a department with direct transfer, or because they have been transferred from the pool.

The appearance of **My Work**, similar to **FdBack pool** is as follows:



The information corresponding to all the interactions and their “feedback” made with the articles created / assigned to the INTRA user is observed. Four points appear that are of interest:

1) The **Update** button, which allows you to update a selected article: it gives access to the article editing screen where the corresponding changes can be made, as well as indicating those interactions that, as they are of interest, will receive an email (**Notify** checkbox), automatically sent by the author, reporting the update of the article thanks to the suggestion / feedback provided.

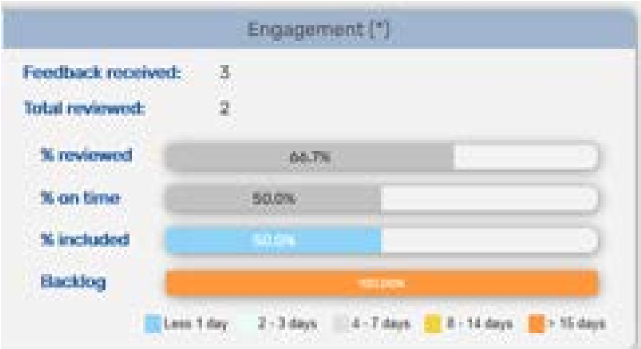


2) The **Status** column, which allows to modify the status of the suggestion, with three possible values: waiting, rejected and considered/included.
3) The **Review comments** column, which allows adding the comment that author deems appropriate for the review follow-up.

4) The **Notify** column, where, by selecting the checkbox, an email, signed by the author will be automatically sent to the visitor indicating that his suggestion has been taken into consideration and the article will be modified.

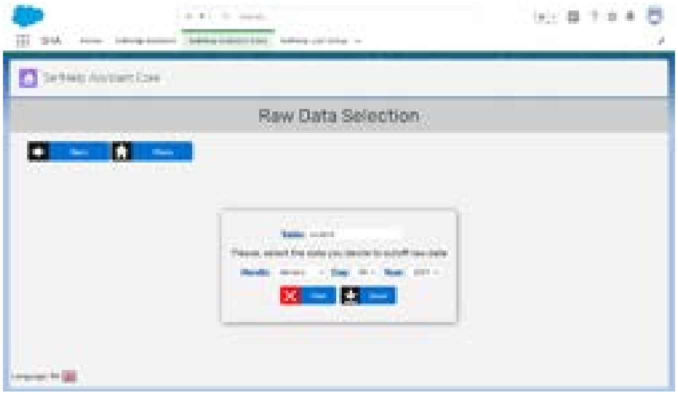
These last three changes are updated by pressing the **Save** button at the bottom of the screen.

In the same way as in the case of **FdBack Pool**, the degree of acceptance of the suggestions received by all the articles of the author is shown in the upper right part of the screen, measured from two aspects: the time passed since the visitor sends the suggestion and the % of acceptance / rejection of them.



6.5.- Downloading Article Raw Data

At the top of navigation menu on **Content Management** section, there is a **Download** button**.** You will be able to download all content data filtering by start date.

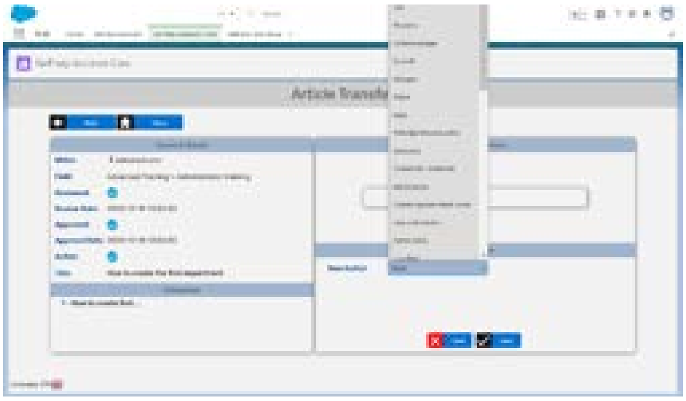


Clicking on that button will activate the *Row Data* selection screen, where you will be able to define the start date for downloading.

As expected, **Clear** button will clean your selection while **Download** button will proceed to data download, in excel format.

6.6.- Transferring article ownership

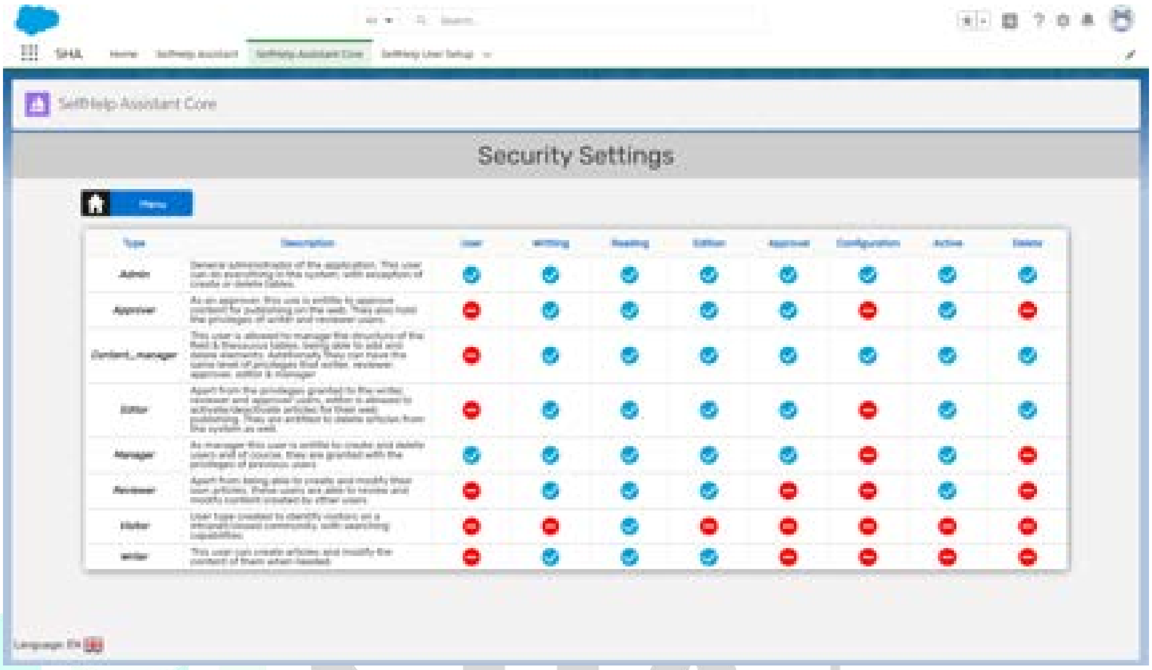
As previously mentioned, one of the possible actions that can be done on an article is the change of ownership. To do so, you must press the icon on the right site of the article line on the **Content Management** section, provided that, you have the proper rights for this action.



At this stage, you are familiarized with the layout of the screen, and you can easily identity the information section on the left, and the action section on the bottom right. You can pick the user you want to transfer the article to, and press the button **Save** to do so.

7.- Security: User Privileges

Before analyzing how SHA Workflow works, we will briefly explain the different types of users, as well as the privileges associated with them. When accessing the **Security** section from the **Main Menu**, the following information is displayed, with the privileges of each of the profiles:



The basic profile is **Visitor**, allowed only to interact with the front end of the application.

A user with ***Writer*** profile can add articles to the database, modify its content and consult all the articles contained in the system. Also, he will have access to the **Dashboard** section, to consult the reports generated by the application.

Those users with ***Reviewer*** profile, in addition to the privileges assigned to the ***Writer*** profile, have access to the **Workflow** section to review the contents included in the database prior to their activation. Likewise, users with **Reviewer** profile can also deactivate articles.

The following profile defined in SHA is ***Editor***: this profile incorporates two additional privileges in relation to the previous profile: to approve articles at workflow level and eliminate these from the database. As an additional note, items are not physically removed, and it is possible to retrieve them later.

Users with ***Approver*** profile, using the ***Reviewer*** profile as a reference, can approve and activate articles.

Manager profile, in addition to the management of articles at workflow level, has the privilege of accessing the users' management of the application (registration, cancellation, modification).

Finally, ***Content Manager*** profile, apart from the workflow management, can manage the tables of Departments, Categories and Knowledge Areas. It also has article deletion privileges.

8.- Managing Workflow

Workflow process controls the status of the articles that form the contents of SHA. To understand its operation, we define the 5 states in which an article can be found:

1) *Initial* state: a user with ***Writer*** privileges enters an article in the database. This article is at initial state: it has not been reviewed, approved, or activated.

In this case, when entering the **Workflow** section from the Main Menu, it will be noted that the article appears on the left of the screen, in the "Not Reviewed" area.

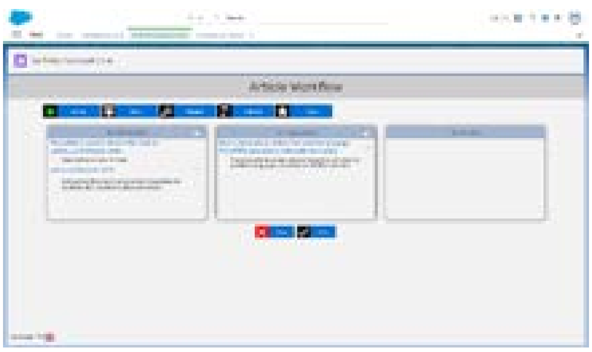
Reviewer profile screen

2) *Revised* status: a user with appropriate privileges has proceeded to review the content and its approval within **Workflow** section.

In this case, the article will appear in the intermediate area, as shown in the image on the left.

Editor profile screen

3) *Approved* status: activated when the article has been reviewed by a user with appropriate privileges and he/she approves the item.



In this case, the article will appear in the right area of the screen, indicating that the item is approved but not active.

Approver profile screen.

4) *Active* status: this state means that a user with appropriate privileges has reviewed the item and proceeded to activate it. The item appears in the **Active** section, as shown in the image below.

An active article can be deactivated through the workflow and assigned to the *Approved* status. However, through the application you cannot reset *Initial* or *Revised* status again. If necessary, the DBA may make such changes.

Once the potential states of an article are known, we can deepen the operation of the section. It consists of four procedures that are:

- **Workflow**: allows to make the necessary approvals until the final activation of an article.
- **Active**: allows to consult active articles and change their status to inactive / not approved.
- **Push**: allows to select high priority items for public area filters.
- **Tracker**: consultation of actions carried out in the Back Office on a particular article.
- **Articles**: returns to **Content Management** main screen.
- **Menu**: returns the INTRA **Main Menu**.

8.1.- Workflow

When we proceeded to the description of workflow states, examples of the appearance of the screen of this procedure were given. Users with the appropriate privileges can see three areas: left, with the articles recently added to the database, that have not been reviewed yet (*Not Reviewed*); central, with the articles that have already been reviewed, but not yet approved (*Not Approved*), and finally right, that shows the items pending activation (*Not Active*).

Each article shows a check box to the right. When the user clicks on any of these buttons, each time **Save** button is pressed, the status of each item will be moved to the next step within the workflow logic. Of course, **Clear** button allows you to correct all the selections made in the check boxes.

By default, when you enter the **Workflow** section you access the review, approval, and activation procedure. The upper navigation bar allows us to change the procedure: as shown in the previous image, the menu has five options: **Active**, **Push**, **Tracker**, **Articles** and **Menu**.

8.2.- Active

By pressing the **Active** button, you view the list of active articles as well and access the procedure of deactivation:

The screen displays the list of active, sorted by columns, with a paging area to allow to move between pages in case the database contains many entries.

A check box button appears next to each article. When this button is selected, and you press the **Save** button, status of items automatically changes to *Approved* and that element disappears from the screen of the **Active** procedure.

As we have seen in other sections, **Clear** button allows you to correct the selections made on the screen.

As of October 2019, v.0.2.2 version, active articles can be filtered by Knowledge Field and Category to facilitate the access to the information.

- **Note: when the Notify option is selected in a particular Knowledge Field, any time an article is activated will trigger a mail to those users with access to that area, informing that content has changed and is available.**

- **Note: from version 1.0 onwards, there is an option available to select all the items simultaneously.**

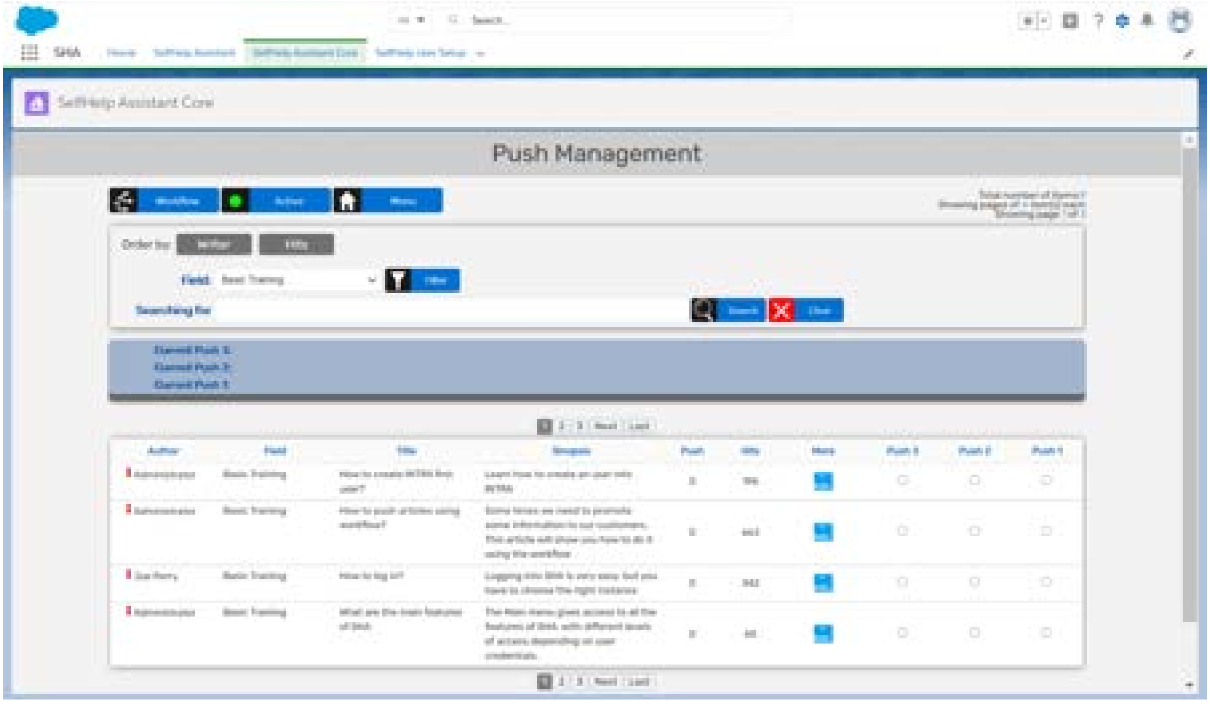
8.3.- Push

From any of the previous procedures in the **Workflow** section, **Push** procedure can be accessed by pressing the corresponding button at the top. The objective of this procedure is to select a maximum of 3 articles that always appear first in the Front End, independently of the search and ordering criteria used in the different scripts.

In this way, the application allows you to "push" the information you consider most relevant or of highest interest, showing it always to visitors in the Front-End area.

Basically *Push 3* allows to select the item with the highest priority of the database, which will be shown first. *Push 2* allows you to select the item with immediately lower priority, and *Push 1*, allows you to select the last of the items that you want to highlight.

Script screen is shown below; It is divided into 3 large sections:



- The upper one contains the navigation menu, the sorting criteria and two small search boxes to search for specific articles or knowledge fields, since according to the database it is growing, it can be more complicated to locate an article in particular.

- The central area includes the summary of the active "push" selections and the list of articles. In each row, 3 radio buttons are displayed, which allow you to select the "push" that you wish to apply to each article. Also, the page listing of items is displayed in this area as well.

- And finally, the lower area, where the action buttons are located: a **Clear** button, three **Push** buttons (to delete) and a **Save** button. The operation of the Clear button is standard, allowing to erase any selection made on the screen. **Push** buttons 1-3 allow selecting articles associated with them to be deleted from the database. Finally, when you click on

Save button, the article-push combination is saved in the database. This combination is also stored although you cannot use the **Save** button when navigating through the paging menu, making it easier to manage the "push" selection when the item listings are very large.

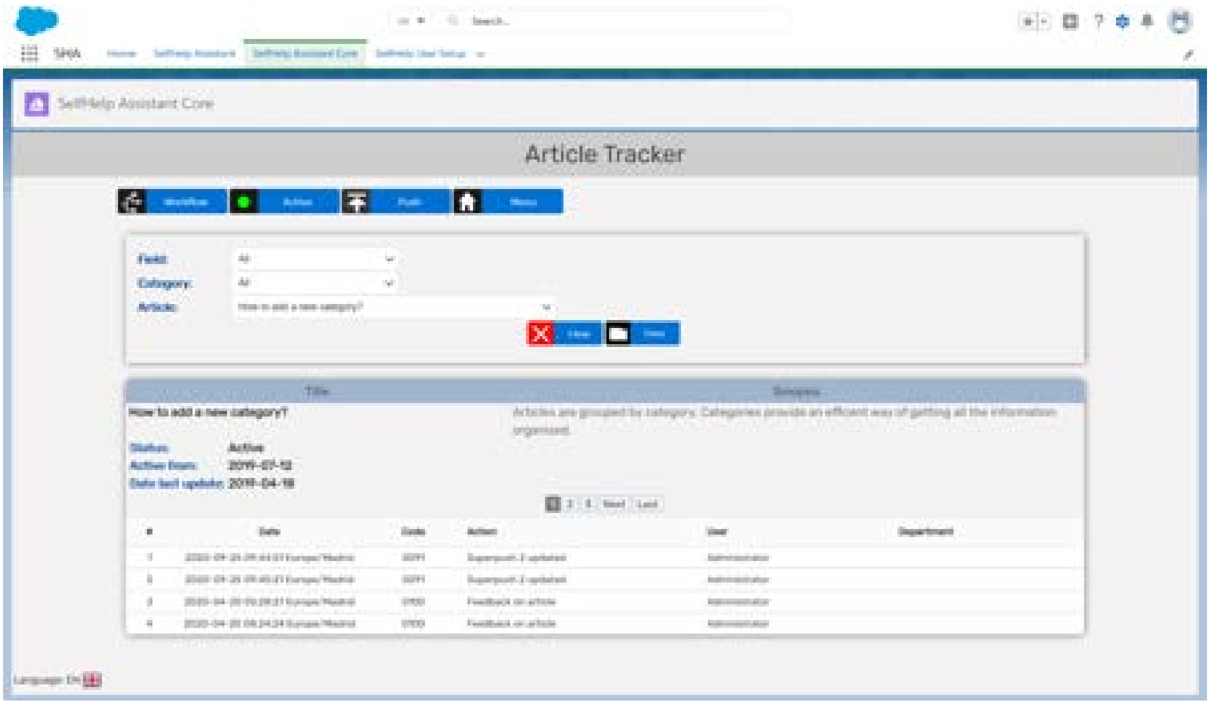
- Please note that the Push procedure can be applied to all the Knowledge Fields.

8.4.- Tracker

As previously indicated, through the **Tracker** script you can access the details of all actions that have taken place in the Back Office for a specific article. To do so, once inside the script, you can filter the articles in the upper section of the screen, by using fields *Field*, *Category* and *Article*.

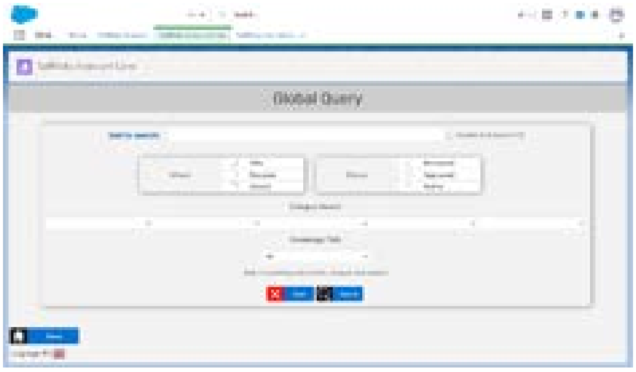
To access the data, you simply need to select an article from the Article list and click on the **Data** button. Once the data has been consulted, pressing **Clear** button returns to the initial position to perform another article search.

The general appearance of the screen is shown in the following picture:



9.- Global Query

Global Query section allows you to search quickly and selectively through articles database, showing relevant information about them. It is accessed from the Main Menu of the application. The home screen is shown below:



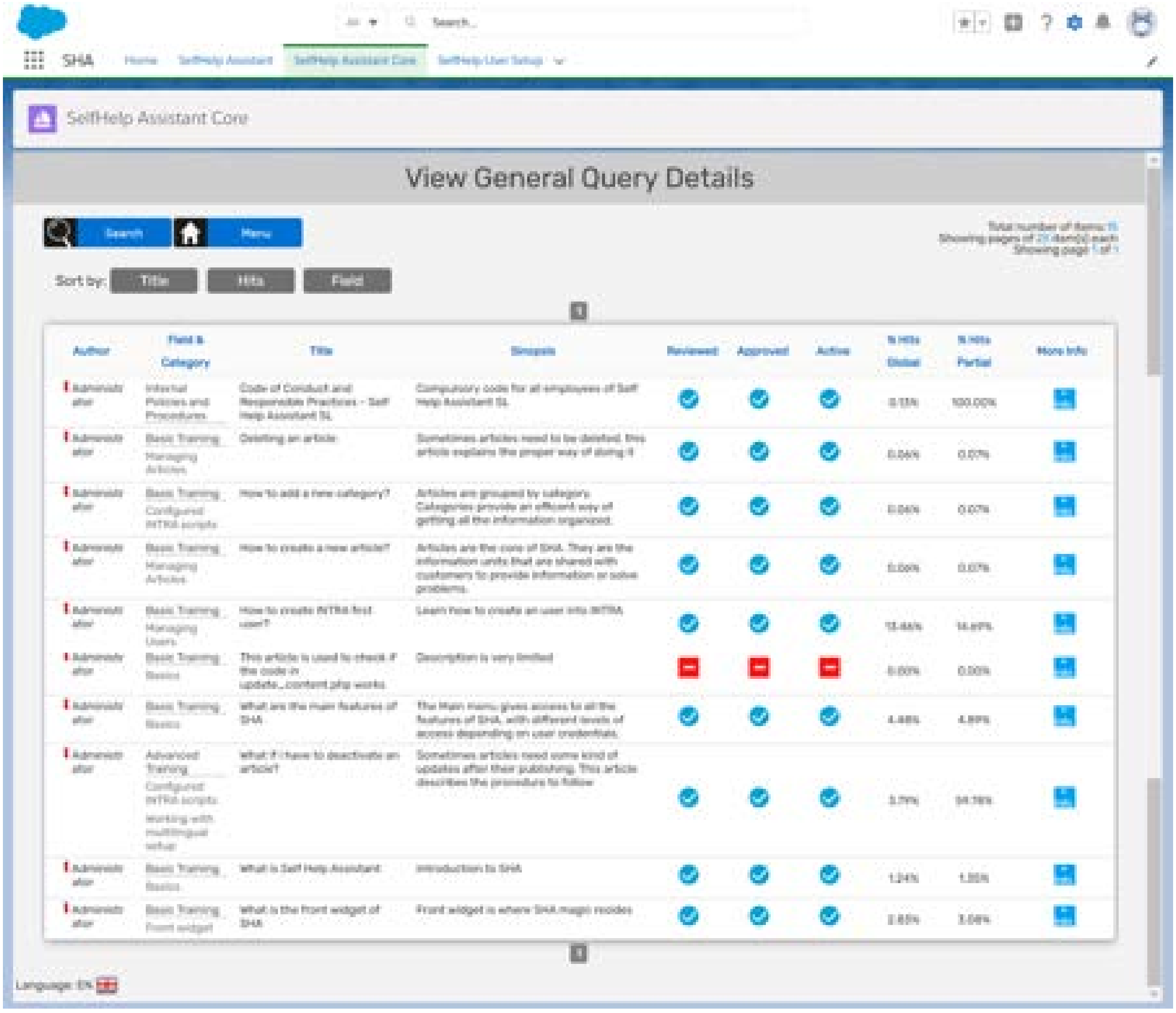
In first line there is an entry box and a check box button that allows you to activate Mysql full text search feature. This search acts on certain index fields of the article table, allowing natural language query executing, and returning the results based on relevance.

If you do not select the check box button, search is made in classic mode. You can narrow the search by indicating whether the values entered in the text field have to be in any of the *Title*, *Synopsis* or *Content* fields of the article table. Likewise, you can indicate the status of the workflow of the articles to be searched (***Reviewed***, ***Approved*** or ***Active***). All these parameters are defined in the area immediately below the text box.

Finally, lower section allows you to select up to five search categories, through the corresponding drop-down menus, and a specific Knowledge Field.

Clear button on the bottom allows you to clean any selections made and **Search** button executes the search.

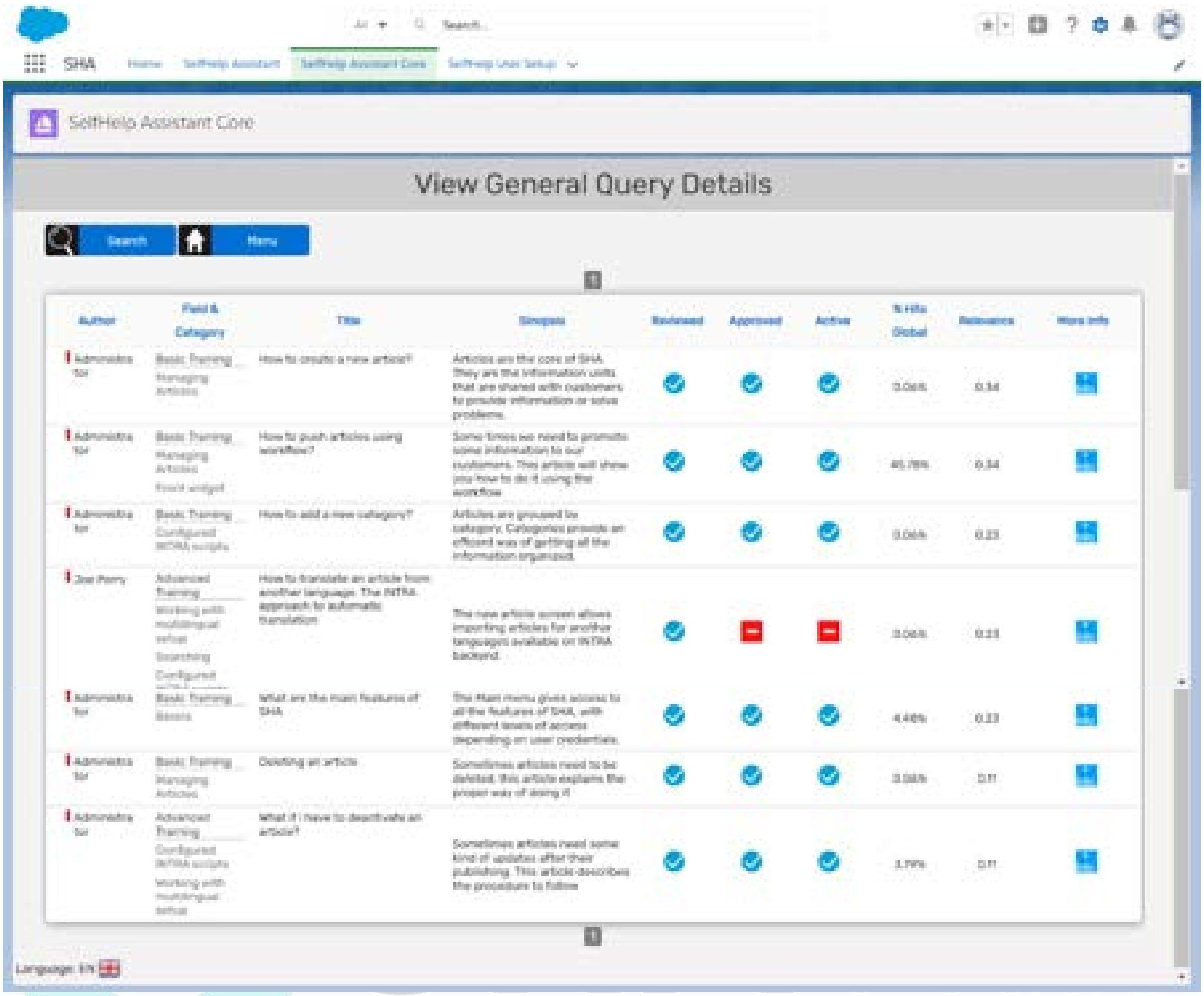
To visualize the result of the search, the look of a query is shown below without using the full text option.



As always, the top part shows the navigation menu with the **Search** and **Main** buttons. Links to change the sorting criteria's (*Knowledge*, *Writer* and *Hits*) are shown underneath.

Finally, list of selected articles. It includes *Author*, *Knowledge Field & Categories*, *Title*, *Synopsis*, *Workflow status*, *% of visits* with respect to total system visits, *% of visits* in relation with subtotal of visits for the same *Knowledge Field*, as well as a link to see the complete detail of the article.

The paging area allows to navigate between the different pages that can make up the total result of the query, depending on the size of the database.



If you execute the query in full text mode, the appearance would be similar, but an additional field is included: *Relevance*. It measures the relevance of the result of each article in relation to the text entered in the search. The greater the number the more relevant result is.

This value is used in the Front-End area to further refine the search performed by a user and eliminate the noise that common words can enter in a specific search.

10.- Dashboard

Dashboard section allows to know details of the use that the visitors of the Front End are doing of the contents included in the database. It is accessed from the **Main Menu** of the application by pressing the corresponding button. The main screen of the section is shown below: apart from a **Daily Flash**, updated on real time, several large aggregate information blocks (**View**) are presented:

- Engagement as % of suggestions reviewed in the first 48 hours after arrival,
- Visitor satisfaction rating in terms of General Satisfaction and Top2Box / Bottom5Box,
- Global 5 top articles,
- Top 10 searches done by visitors as well as CX cloud,
- Visits by country in the last 90 days, and,
- Visits funnel, for the last 365 days.

Three important remarks at this stage:

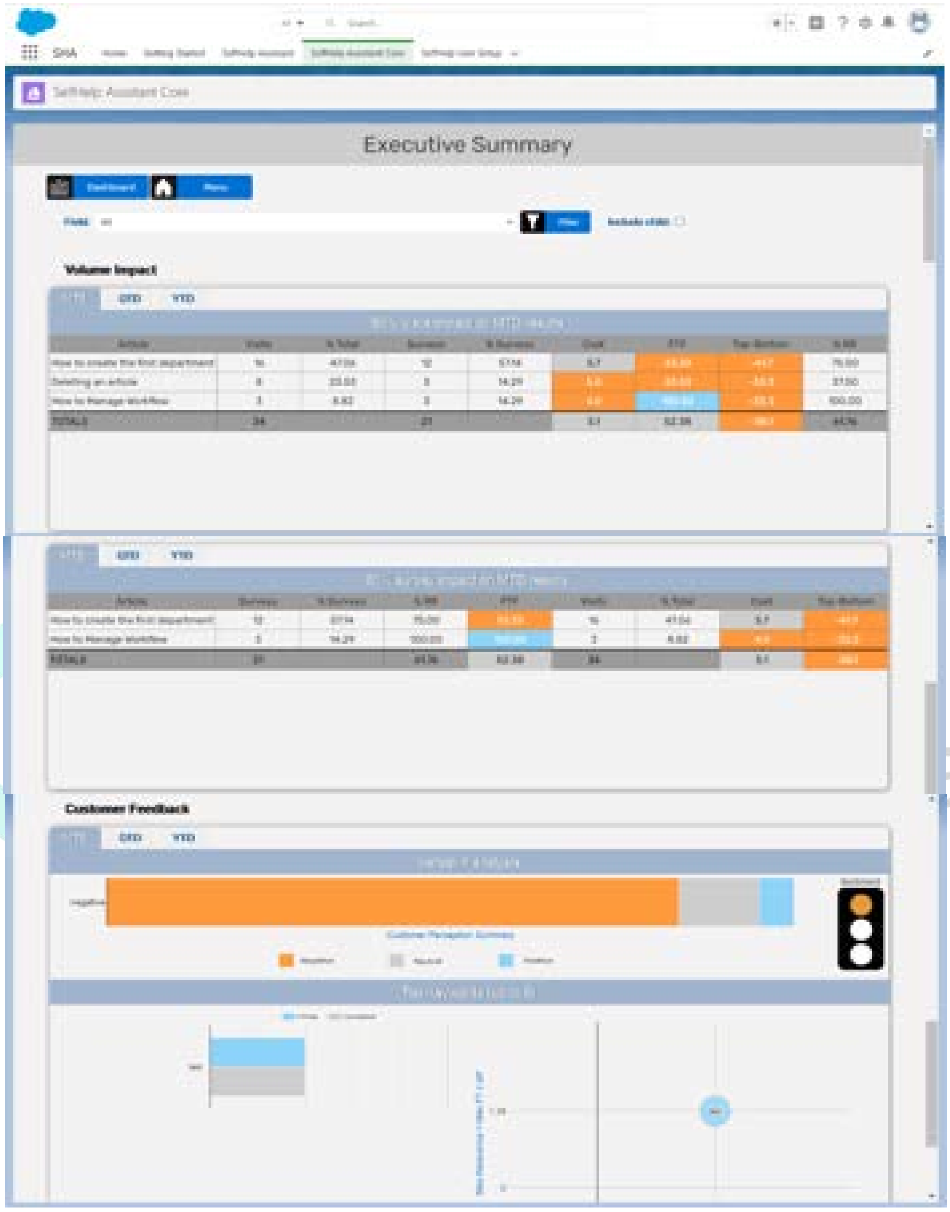
- <u>Filtering by Knowledge Field</u>: you can apply this filter to see results corresponding only to articles related to a particular domain. This filter is not updating the Top 10 searches areas, as searches by design are not related to Fields.
- <u>Filtering by time interval</u>: you can apply this filter to the active Knowledge Field or to all articles in the database.
- Country/City (Expand/Contract): you can swap from countries to cities and vice versa, to see the visitor's origin distribution.

To deepen the contents of the Dashboard, you will need to use the navigation menu located at the top of the screen. It consists of the following options:

1) **Executive Summary**: MTD/QTD and YTD results for authorized profiles (admins, managers, and content managers).
2) **Flash:** aggregated daily performance. The color code indicates performance versus targets.
3) **Articles**: it offers information about the content of the database by Knowledge Areas, Categories, and most significant articles.
4) **Visits**: you can see detailed information of the countries of the visitors, obtained from their IP addresses.
5) **Experience**: we offer a comprehensive view of the perception of quality of end users at the level of categories and articles.
6) **Coaching**: detailed view of user visits, including different types of stats.
7) **Production**: gives us an overview of the content of the table of articles with the main metrics of their use.
8) **Geogrid**: allows a real time comparison between four CX metrics, by country/region and number of visits.
9) **Menu**: allows us to return to the Main Menu of the application.

10.1.-Executive Summary

When you click on the icon located at the left side of the navigation button, the Executive Summary is shown, as follows

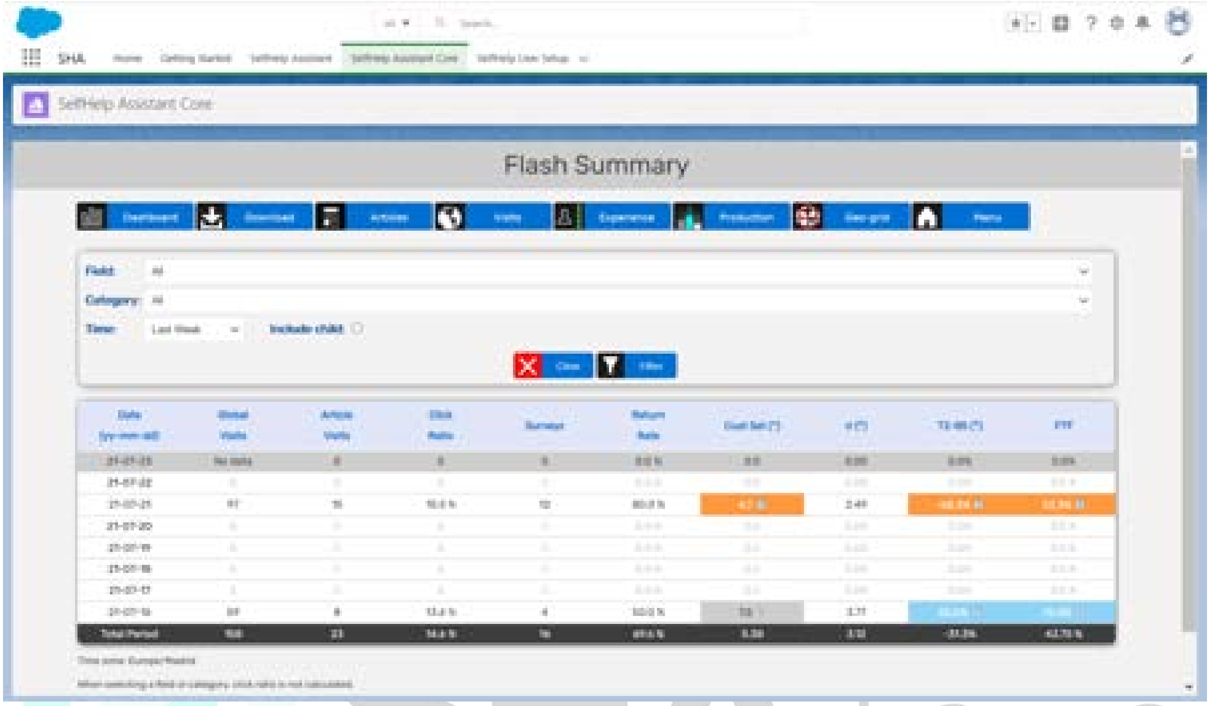


Information is organized in three main areas: impact of articles generating 80% of total visits, impact of articles generating 80% of received surveys, and **Customer Feedback** (keywords and importance/relevance) for each time interval (Month to date -MTD-, Quarter to date -QTD- and Year to date -YTD). Time intervals can be accessed by clicking on the corresponding tab in each area.

Information for a specific **Knowledge Field** me be retrieved using the select box and pressing on the filter button. Additionally, information for child fields can be incorporated using the corresponding checkbox.

10.2.-Flash

When you click on the **Flash** button, you access to a detailed view of the daily performance during the time period you select on the top section of the screen. You can also select any Knowledge Filed or Article category you may want to drill as well.

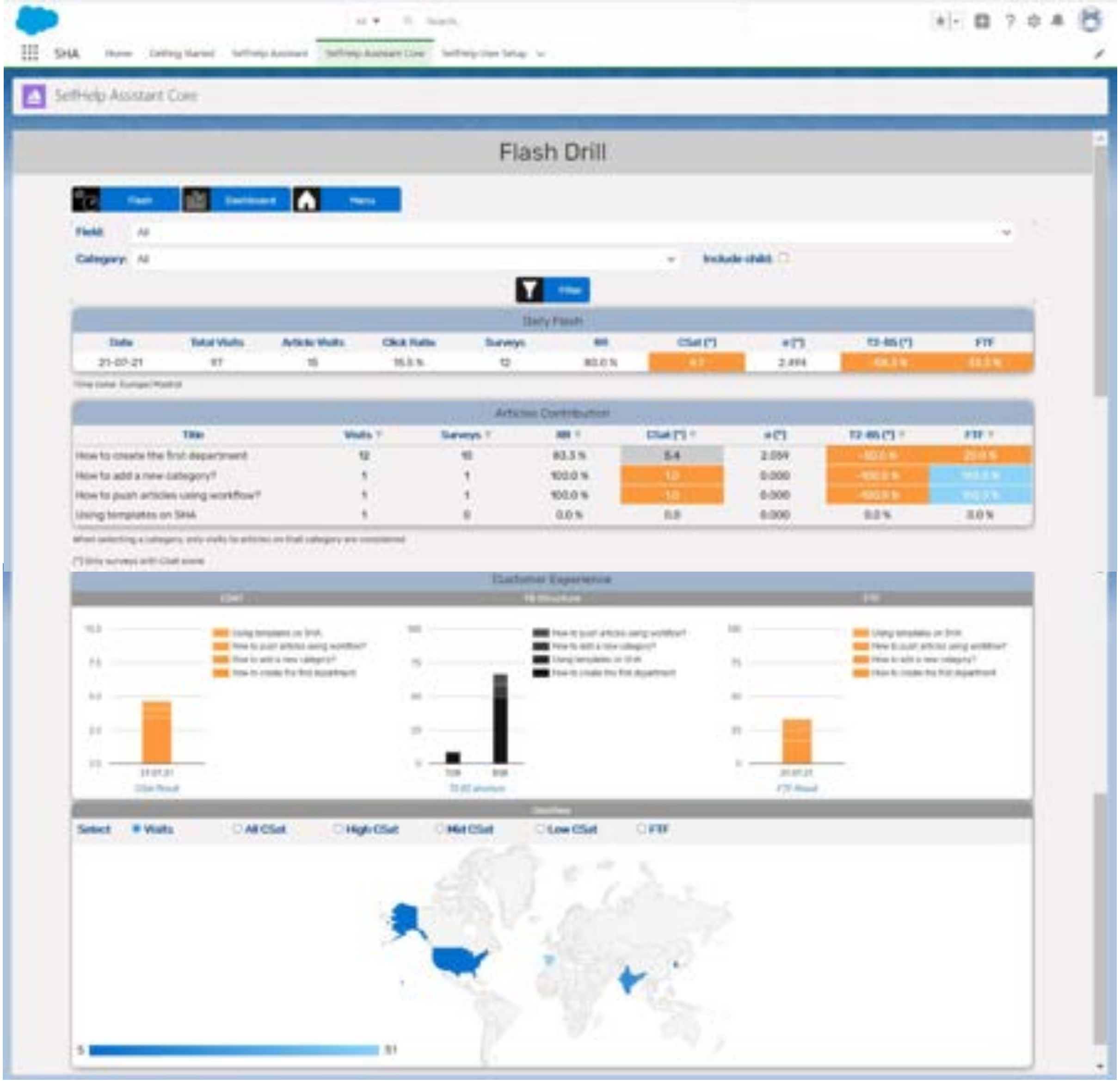


For each day, number of articles visited, surveys replayed, return rate, average customer satisfaction, standard deviation of CSat, T2 – B5 result, and issues resolved on the first contact (FTF) are presented, help you to monitor overall tool performance. Total results for the selected period are presented as well.

The color scheme helps in gathering a fast overview of the overall performance: green means metric on target, red means metric off lower performance target and yellow means attention needed.

As in any section of SHA, you can move around through the navigation button located at the top of the page. Data grid can be downloaded to an excel file but clicking on the **Download** button: the system will extract the data according to the filter criteria selected by the user on the drop-down boxes.

When relevant drill data is available you will see the “**?** “ sign. By clicking on it, you will access the detailed view for that date:



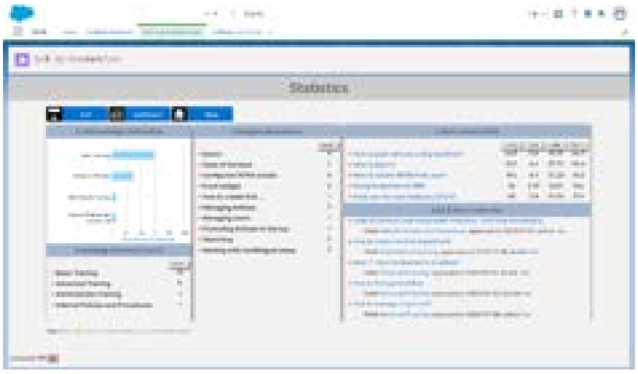
The information presented is organized as follows:

- Top sections show navigation options and Field and Category filters.
- Daily flash shows the final performance in terms of volume and metrics for the selected day (when current date is selected, data is up to date).
- Article contribution indicates how each article contributes to the overall daily performance through its individual performance. Metrics can be sorted upwards or downwards.
- Customer Experience section shows in a graphic presentation how each individual article contributes to Csat, FTF and TopBottom performance. Finally, a world map represents the origin of the visits received (it is possible to select only some value for this map representation).

As in any section of SHA, you can move around through the navigation button located at the top of the page.

10.3.- Articles

By clicking on the **Articles** button, we access the following screen:

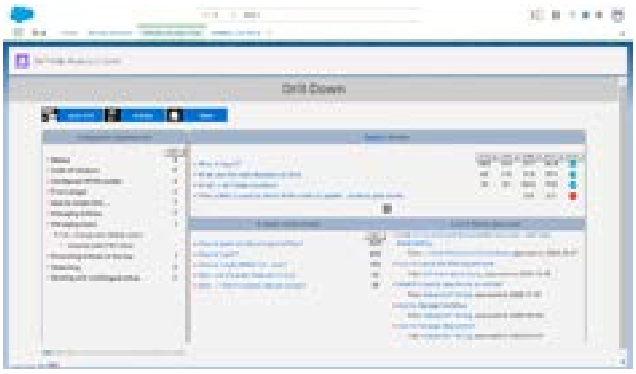


The left area tells you how articles are distributed by *Knowledge Field*, both in percentage and in absolute value.

The central area tells you how many articles are associated to each *Category*. Please, take into consideration that articles may be associated with several categories.

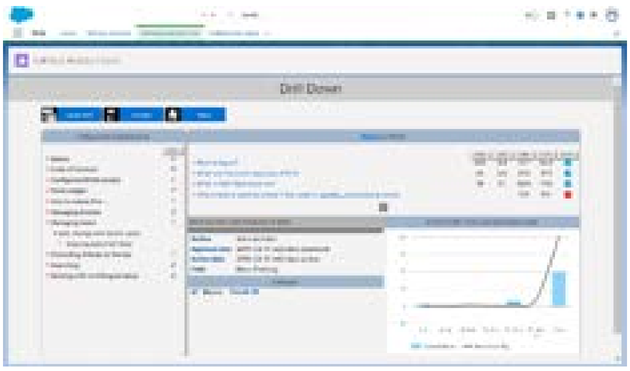
And finally, the right area shows in the upper part, top 5 visited articles and in the lower part 5 latest approved articles and published in the Front End. All displayed items have links to the details screen.

It is observed that the top navigation menu, in addition to **Dashboard** and **Menu** buttons, has a **Drill** button. This allows us to get more detailed information at the article level within each *Category*. Pressing said button, the appearance of the screen changes and new sections are shown as can be seen in the image:



Right upper area shows the list of items belonging to the category selected on the left area, by clicking on any of the categories.

Right lower area, when entering first time **Drill** section, offers top five visited articles and the last five approved articles.

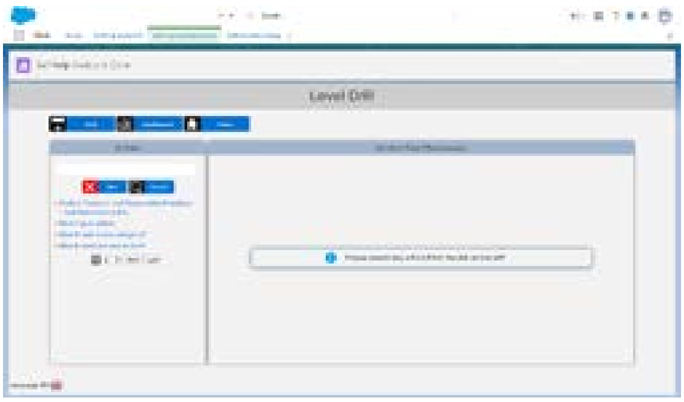


If we click on any of the links of the articles on the top, screen aspect changes, offering more detailed information: author, approval, and activation dates, associated knowledge field, categories, and percentile that the article occupies in relation to the selected category (bases on number of hits).

Likewise, the comparison of the pattern of visits received by the article from its activation date with the average of visits received by the articles of the same category is shown graphically. This indicator allows us to observe the behavior of users in relation to the new item published.

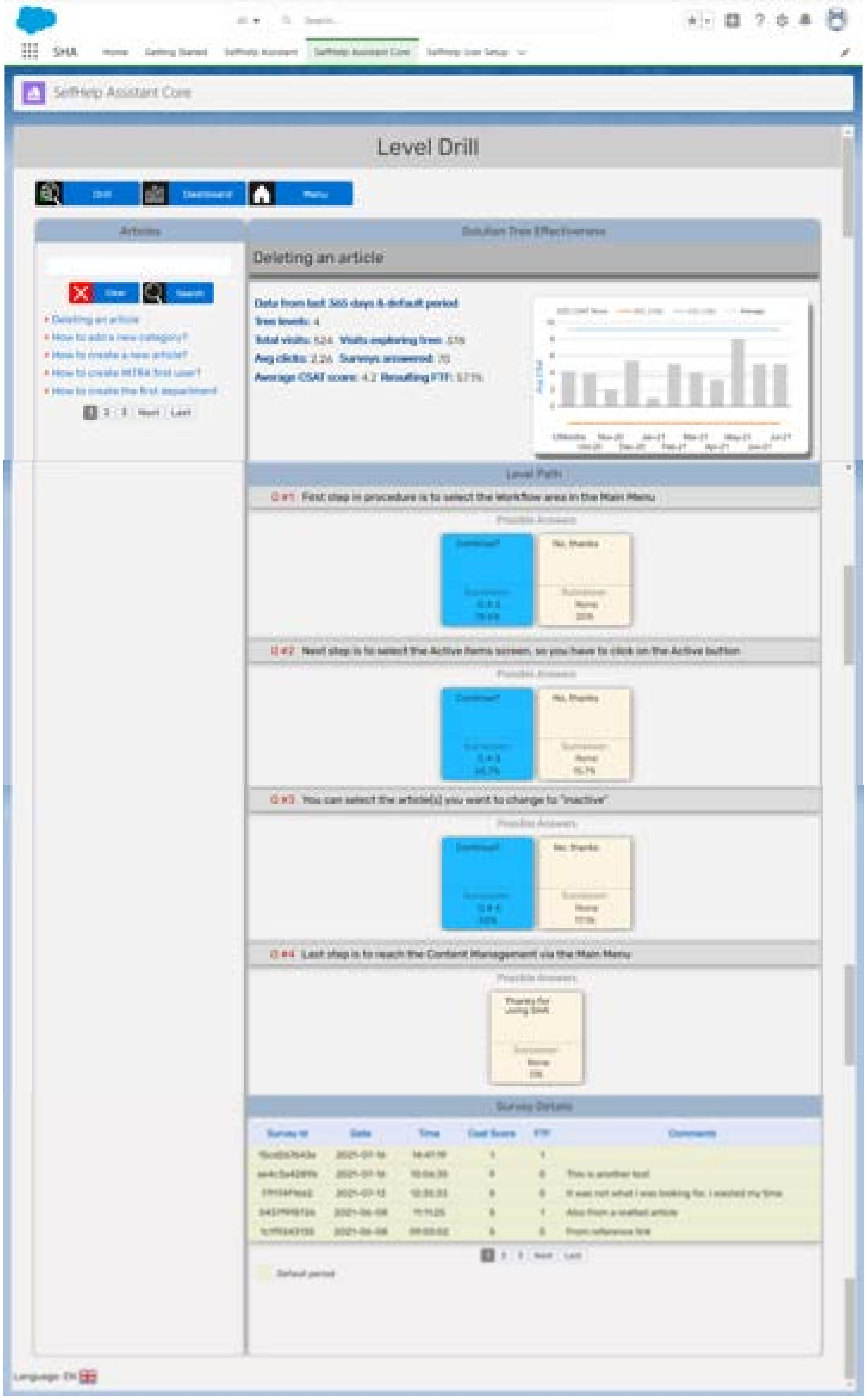
As you can see again in the navigation menu, you have three navigation options: **LevelDrill**, **Articles** (returns to previous screen) and **Menu**.

By pressing the **Leveldrill** button, you access the following screen:



The left section shows the list of articles in the database with the corresponding paging to move back and forth. Also, a search box appears at the top to help searching articles.

To select a specific article, we just must click on the link associated with each article. When performing this action, the right part of the screen offers additional information about the article, as shown in the following image.



First, and after the title, it shows the levels *Decision Tree* has got (if it has been defined), total number of visits received, number of those that explored the tree and how many visits generated a response to the satisfaction surveys.

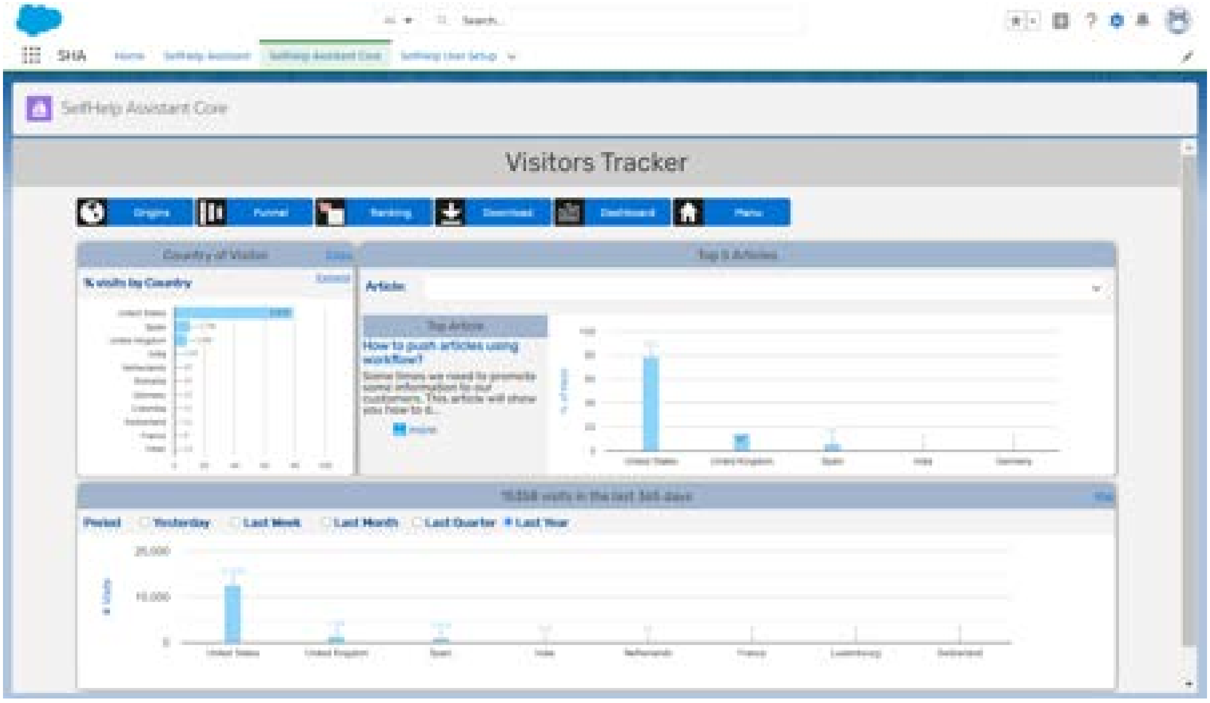
Also shown at the top right is the average rating of the visitor's satisfaction with the content offered.

Then, in the case that the article has got *Decision Tree*, % of visits that each question / answers has had is shown. In this way it is possible to visualize the most common behavior from users and extract the corresponding conclusions.

Finally, the list of surveys answered by visitors is shown, with encrypted user id if provided by client landing page.

10.4.- Visits

When you access the **Visits** section, the application shows us information regarding the geographical precedence of visitors, at aggregate and article levels.



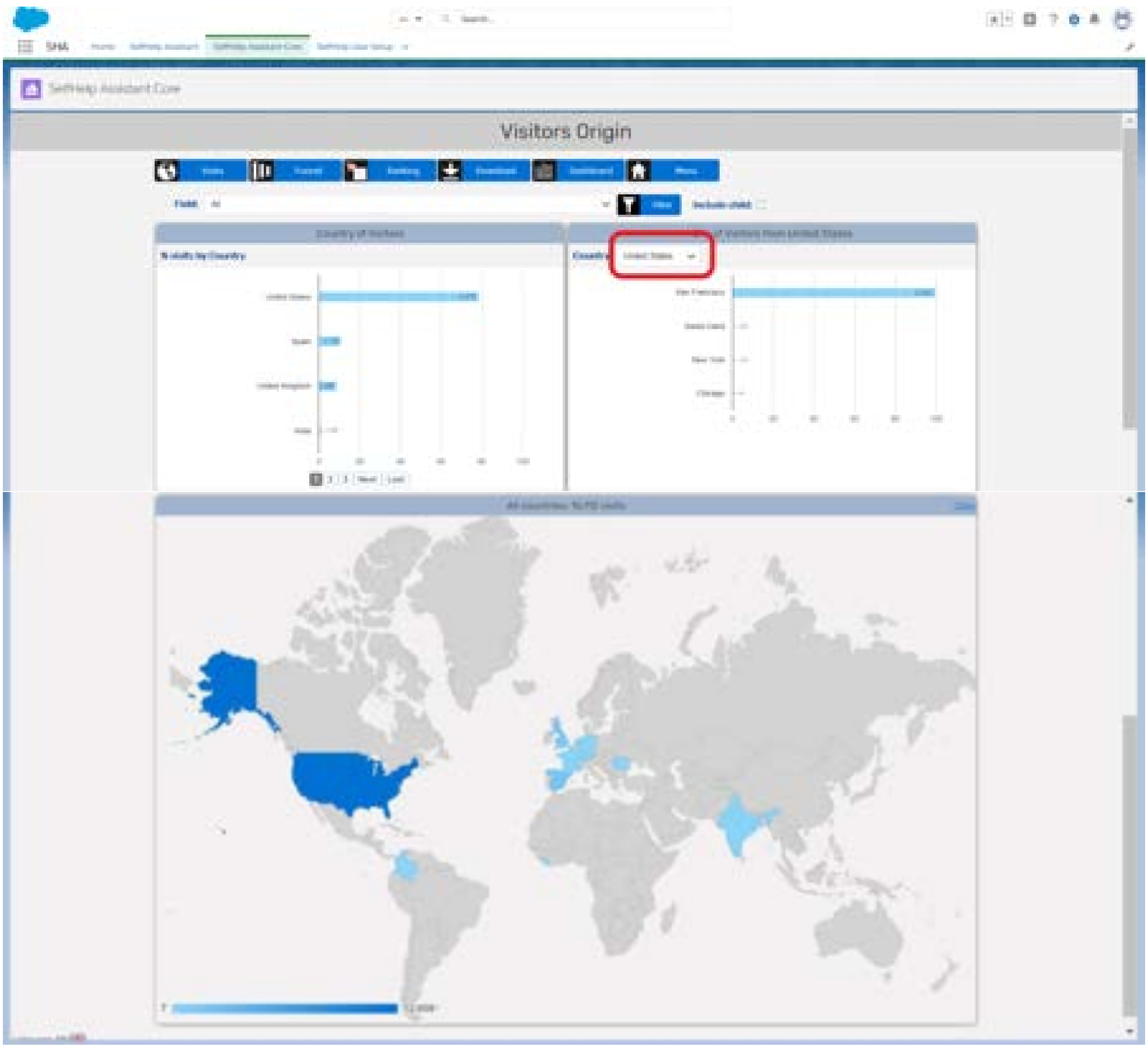
On a global level, country distribution is shown in the upper left part of the screen.

At the article level, in the top right section country distribution is shown for Top articles (in terms of number of visits).

You can select the item to be viewed through the drop-down located at the top. The result of said selection is updated in the article graph as it can be seen in the image shown below. As in other sections of the application, you can access the details of the article by clicking on the associated link.

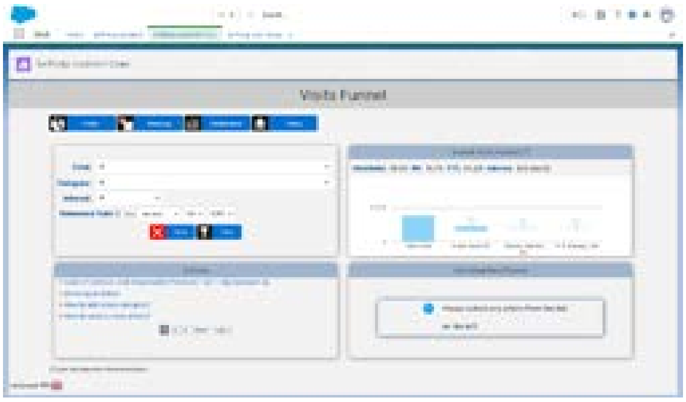
Finally, in the lower part of the screen, the geographical origin of the visits received is shown according to the selected time range.

There are three options in the navigation menu that require attention: **Origins**, **Funnel** and **Ranking**. Let's explore them.



When you press **Origins** button SHA will bring the data shown on the left to you screen:

a) Knowledge Field filter.
b) Distribution of visitors by country.
c) Distribution of visitors by cities: you can select the country you desire. This section will be updated as well as the geo map.
d) Geo view of all the visits: you can swap geo view by country or by city for each Field and Country.



When **Funnel** button is pressed, the screen shown is as follows:
The screen is organized in four sections:

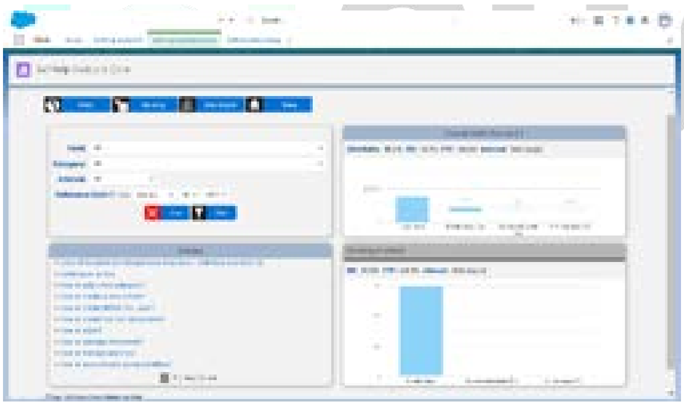
- Filter section on the top left
- Overall visits funnel on the top right
- Article list, according to filter values on the bottom left
- Article details, with no data yet, on the bottom right.

Despite working with this section is quite intuitive there are some hints that are interesting:

When you select any Field or Category and press the Filter button, the article list will filter content based on those criteria.

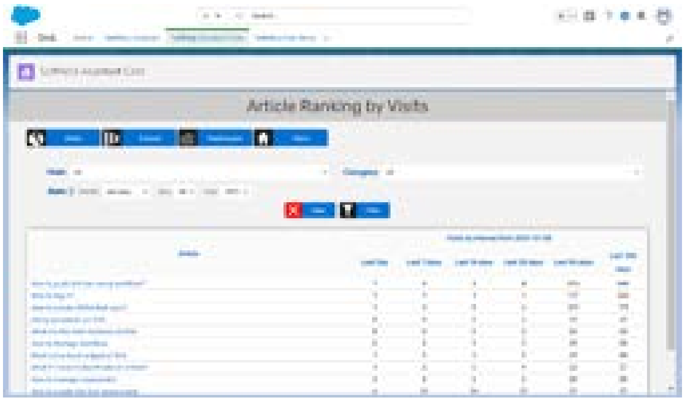
When changing the interval or the reference day, once the **Filter** button is press, the Overall Funnel chart will be recalculated according to those time filters.

If interval is selected or reference date is changed, once you press on any article the corresponding chart will filter the funnel data considering those time filters.



As mentioned, by clicking any article on the left, the corresponding funnel chart will be presented (see left picture).

Coming back to the **Visits** menu, you may go on step further in data analysis by clicking on the **Ranking** button from the navigation menu.



This script shows by article the distribution of received visits by time intervals (last day, last week, last 2 weeks, last month, last quarter and last year).

Additionally, you may select the starting date for recalculating intervals on the **Filter** button.

Note: queries are run based on hits data stored in database. This is done considering the Front Period flag. You may see that for short flags, some articles with a big number of visits in the past are not ranked in the top positions.

10.5.- Experience

The **Experience** section analyzes from a qualitative and quantitative perspective visitor's satisfaction with published articles.

When you access it for the first time, you can see the navigation menu at the top: **Sentiment, Resolution, Verbatim, Dashboard**, **Download** and **Menu**. These buttons will be explained further in the document.

Then, on the left side, there are four select boxes that allow to filter the information to be shown on the screen: *by knowledge field*, by *category*, by *survey result* and by the *user's date of visit*. You can also observe a check box labeled include child: when this button is checked, the filter will be applied to all fields and categories and their child's.

In the right part, *Average Satisfaction* results, as well as the *Top 2 Box* and the *Bottom 5 Box* are shown (see appendix). On the **Configuration** section of **Main Menu**, default number of columns for these charts are set.

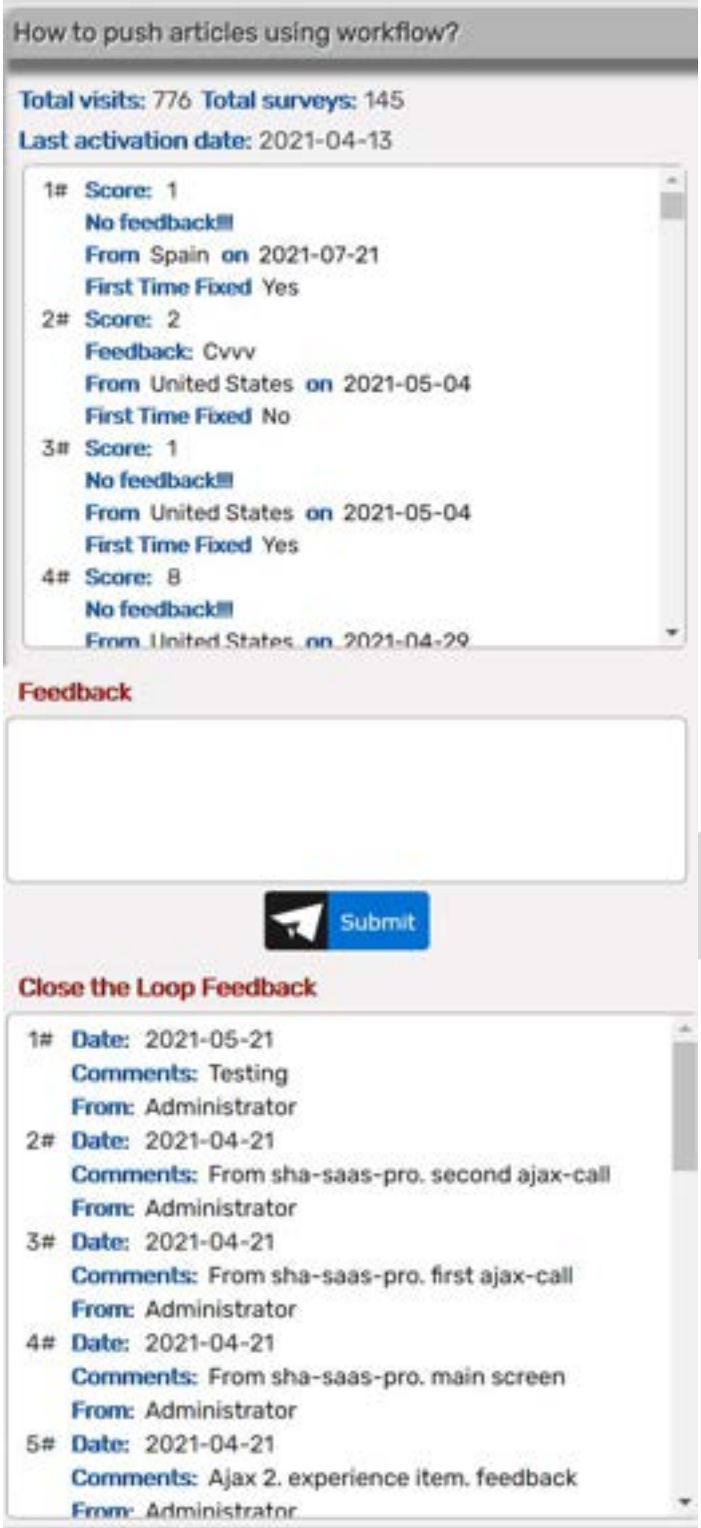
Immediately below is the area where the results associated with the filters applied are displayed. When accessing for the first time there is no active filter. This area is organized in three columns:

- First shows Average Satisfaction and Top2Box / Bottom5Box for the selection, as well as global data of visits and dates.

- Second shows the visits received for both current and old versions of active articles in the selected filter.

- Third presents detailed information for each article selected, by clicking on their links. An article can be selected by clicking on the link located in the description of the central column.

The power of this section is manifested when a particular article is analyzed. The result of this analysis is shown in the following picture.



First, general information of the article is shown in the column on the right: *Decision Tree levels (if any), total visits, received surveys (both related to the filters applied)* and *activation date*.

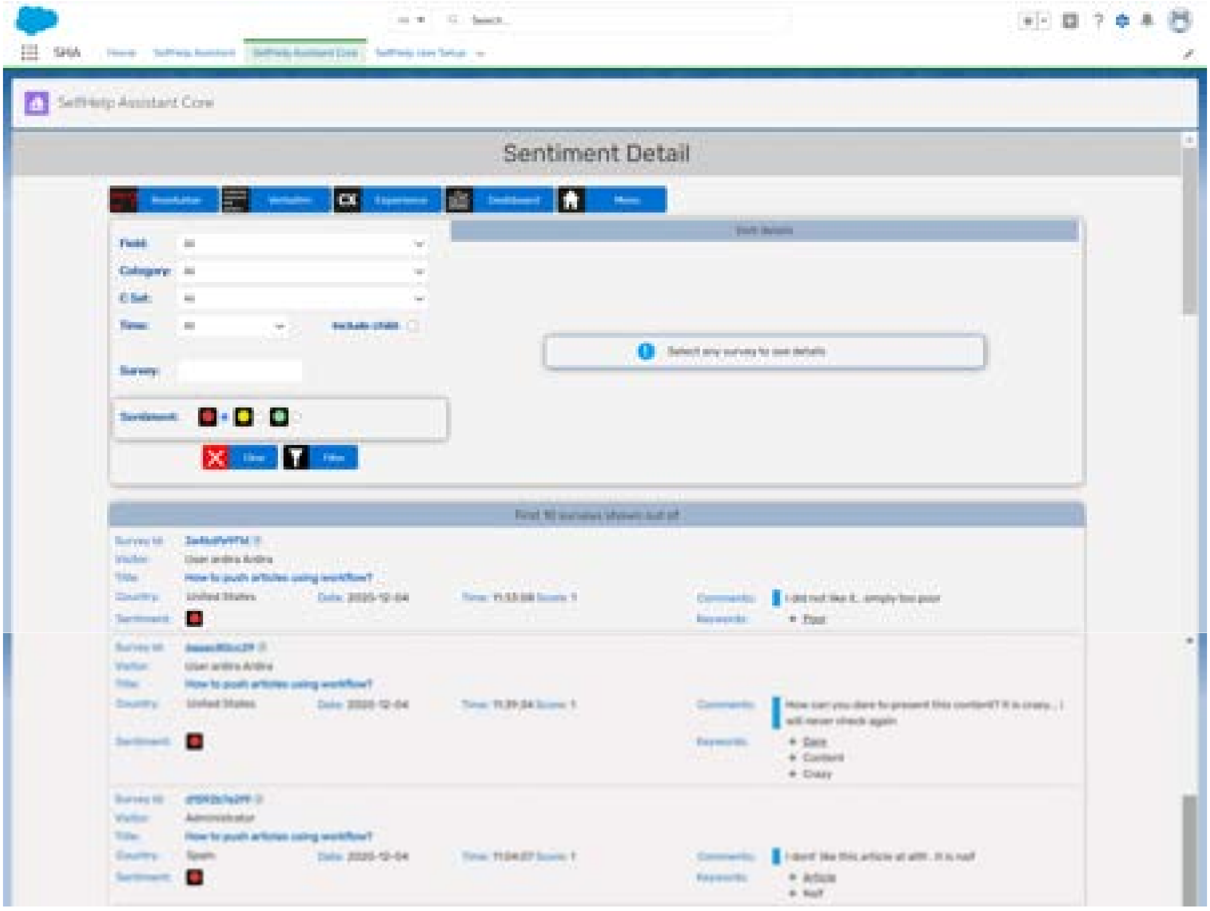
Below is feedback provided by the visitors in the survey, in terms of score obtained, additional comments (verbatims), origin and date of the visit, and if the visitor considers that the information provided solved their doubt / problem. This information set is capped to 100 records.

When the user has appropriate privileges, he/she can use the **Internal Feedback** section to submit any relevant comment he may consider of interest to the writer, since it will be shared with article's author, being appended to article history. Likewise, said information will appear in the **Content Management** section when you visit any article. The next two images show the appearance of the screen once the feedback has been recorded in Experience, and how it is displayed in the details of the article.

As previously indicated, the Experience navigation menu includes some additional buttons apart from the standard ones: **Sentiment, Resolution, Verbatim, Correlation, Coaching and Download**. The last one works exactly in the same way previously described on the **Content Management** section.

10.5.1- Sentiment

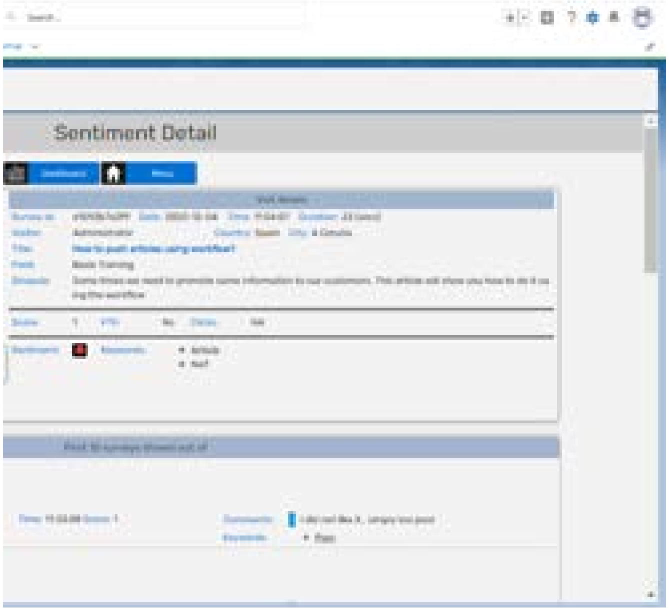
By pressing on **Sentiment** button, sentiment details are brought to the screen as follows:



Sentiment is detected by NLP module, and can be Positive, Neutral or Negative. It is an indication of a visitor feeling after interacting with a particular item on the knowledge base.

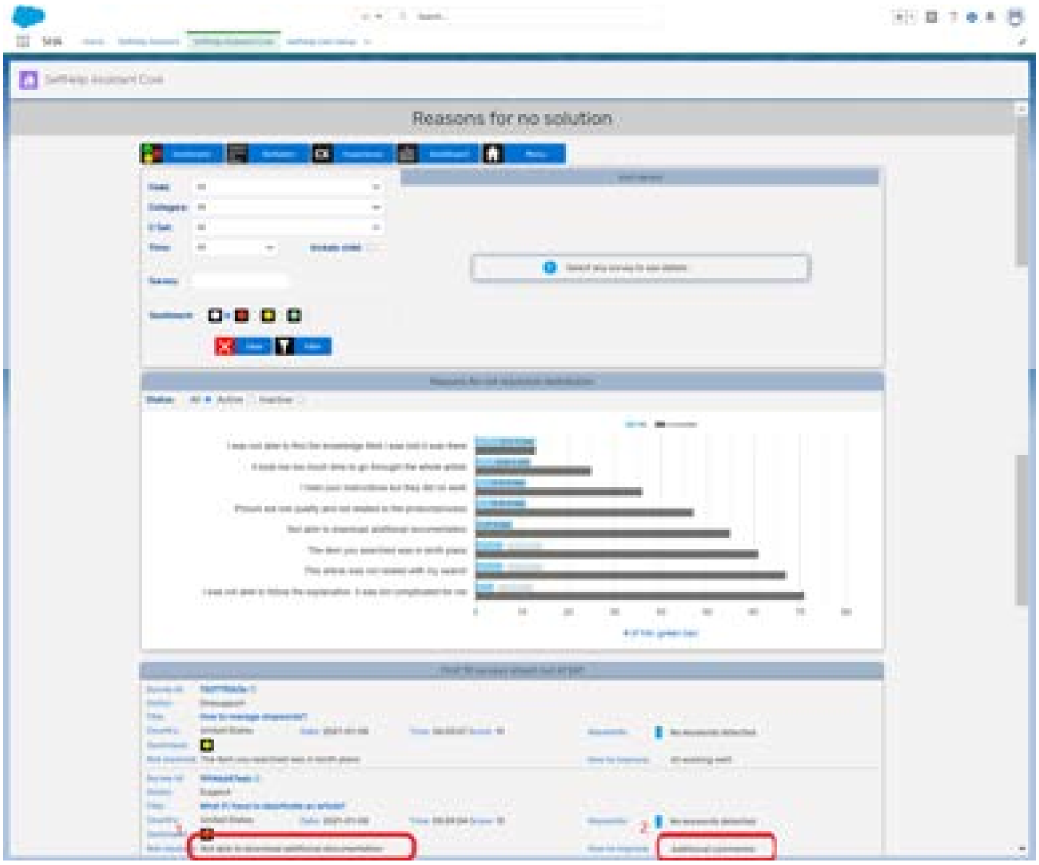
As always, apart from the navigation menu on the top, there are three main sections: filter, details, and surveys. In this area of the application, filters can be done based on normal fields and sentiment status. Additionally, you can search for an individual survey using is survey id. Survey id is communicated to the content owner if the notification option is activated (see configuration section).

By pressing on any survey id from the lower section of by filtering by survey id, the visit detail section will present some additional information: date and time of the visits, visitor (on INTRA version only), origin of the visit, article, field, CSat score, FTF result, # of clicks on the article troubleshooting tree, sentiment result and keywords identified from customer comments.



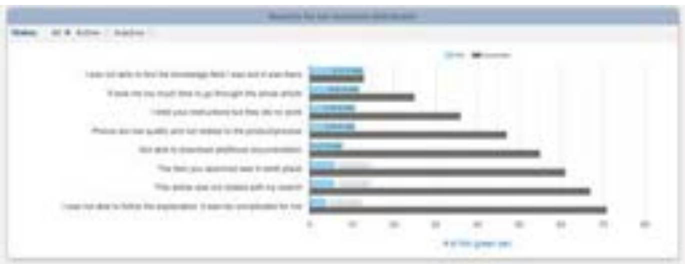
10.5.2- Resolution

By pressing on **Resolution** button, additional feedback on why the visitor was not able to solve/fix his/her query is brought to the screen as follows:

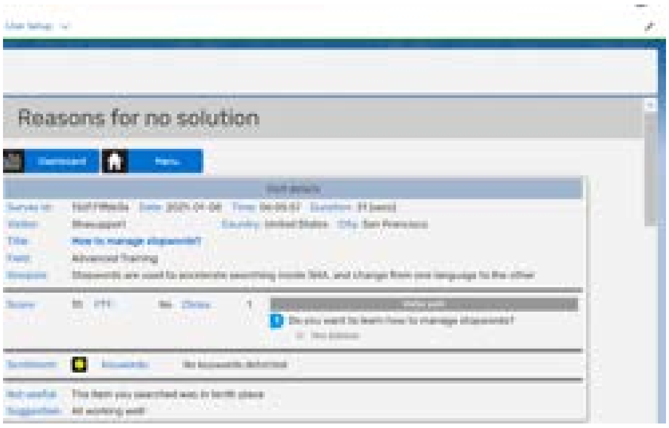


While the screen may seem similar to the Sentiment section, there are few differences: general feedback is not presented, but reason for not resolving the query (1) as well as customer suggestion to improve the content aiming for that resolution (2).

The graph located in the central section shows the distribution of reasons for not resolution from feedback provided by visitors. You can select the article status: **all** articles, **active** articles or **inactive** articles via the check box located at the top.



Selecting any survey will show a detailed view of the interaction, including a view of the troubleshooting path followed by visitor, if any.



10.5.3- Verbatim analysis

By pressing on **Verbatim** button an overall view of customer feedback is presented, as follows:

You may recognize the navigation menu at the top of the screen, and the filter section at the top left. As a remark, the time filter allows "customer filter" enabling filtering results between two dates defined by user.

There is also a "include child" check box: this feature enables the filter to search data in a particular field or category and all items depending on them on **a parent-child relationship** defined for each item.

This time, Customer Satisfaction pictures will be related to the filter value at any time.

Additionally, the bottom section is divided in three areas:

- First on the left presents the data of any survey answered by visitors (survey id, country, date, customer satisfaction score, comments-verbatim- and sentiment extracted from verbatim).
- Second on the right, brings two pictures to your attention: the upper one indicates the overall perception of visitors based on NPL analysis of the surveys verbatims: outcome may be positive, negative, or neutral. Lower picture identifies the top keywords found in verbatims based on appearance frequency and sequence size. These two parameters are defined at the **Configuration** section on Main Menu.
- Finally, the bottom section illustrates how relevant keywords are, in terms, for instance of "actionable items" considering de ***Relevance/IdF*** methodology.

You can run any combination of values on filters, and even combine them with a particular article, using the **Article** select box. By pressing the **Filter** button results will be recalculated.

10.5.4- Correlation analysis

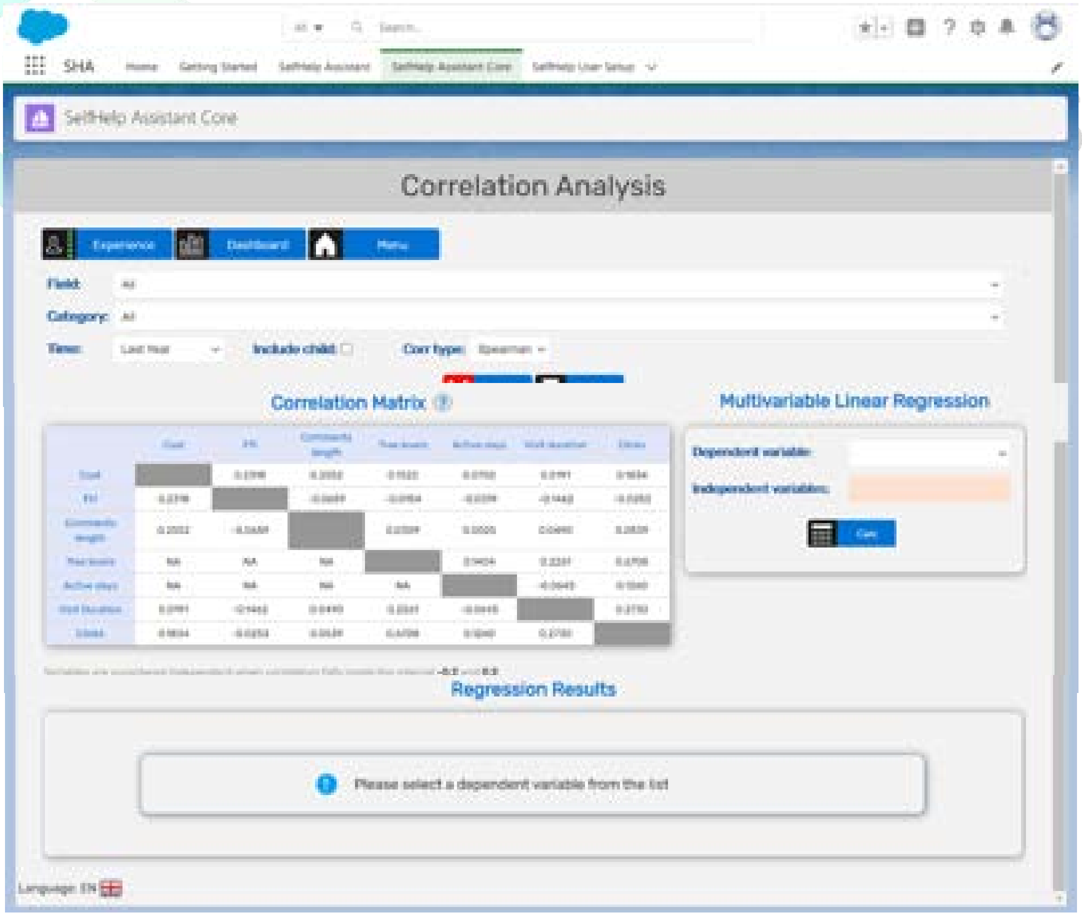
By pressing on **Correlation** button, you will be able to run some statistical analysis: taking as baseline correlation indexes between independent variables gathered from custom interactions, a multi variable linear regression can be calculated selecting a depending variable.

Variables considered on this analysis are:

- Customer Satisfaction (Csat)
- First Contact Resolution (FTF)
- Size of customer feedback (Comments Length)
- Tree Levels of the article troubleshooting tree if any
- Number of days visited article is active (Active Days)
- Customer visit duration in minutes (Visit Duration)
- Number of clicks the visitor has made on the article (Clicks).

Both Tree Levels and Active days will not be considered dependent variables, as they cannot be influenced by any means from visitor.

The initial appearance of the section is as follows:



As always, you find at the top the navigation menu followed by the filter area. Important remark here: you can select two different correlation coefficients:

- Spearman: nonparametric measure of rank correlation (statistical dependence of ranking between two variables). It measures the strength and direction of the association between the two ranked variables. For the coefficient calculation n is the number of data points of the two variables and d_i^2 is the difference in ranks of the "ith" element. The general formula is adjusted when ranks are repeating with factor 1/12 ($m_i^3 - m_i$), being m_i the number of times a rank is repeating.

$$\rho = 1 - \frac{6 \sum d_i^2}{n(n^2 - 1)}$$

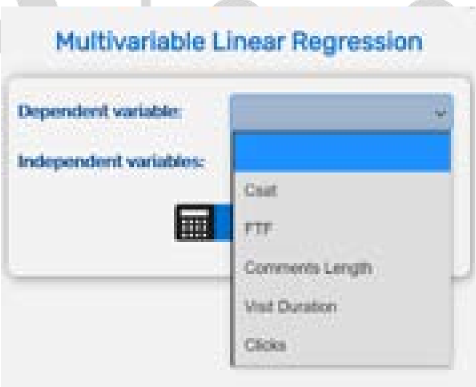
- Pearson: statistical measure of the strength of a linear relationship between paired data. It is the ratio between the covariance of two variables and the product of their standard deviations; thus is a normalized measurement of the covariance.

$$r = \frac{\sum (x_i - \bar{x})(y_i - \bar{y})}{\sqrt{\sum (x_i - \bar{x})^2 \sum (y_i - \bar{y})^2}}$$

By default, Spearman coefficient is used in calculations, but you can select the coefficient to be used on the **Corr type** select box.

Depending on the chosen type, the correlation range to consider two variables independent will be different: -0.20 / 0.20 for Spearman and -0.075 / 0.075 for Pearson.

Base on correlation, the dependent variables for a particular indepent variable will be established. To select one indepent variable to run calculations, you can pick them on the **Dependent variable** select box. As soon as you select one, the list of indepent variables will be populated, and calculations will be run once you press the **Calc** button.



Outcome of the calculation is presented in the on the Regression Results section as follows:

On the left, you can see the regression coefficients for the independent variables, as well as the regression equation.

On the right side, some additional information about the regression results and the degree of adjustment:

- N: number of data points
- P: number of independent variables: the final number is selected based on the combination of low correlation coefficients (independent) and high correlation coefficients (dependent). When a high correlation between two potential independent variables appears, only one of those variables is used.
- Variance of the dependent variable
- Standard Deviation of the dependent variable
- Total Variability
- Explained Variability by the model.
- Non-Explained Variability by the model
- R^2: variability explained by the model versus total variability. Depending on the value of this indicator, the regression model can be bad or good estimator of the dependent variable selected.
- Adjusted R^2: includes the effect of the number of independent variables.
- F: test of significance of the regression equation as a whole. It is calculated dividing the explained variability by the unexplained variability.

As a final remark, the regression model calculation solves the following algebraic equation:

$$b = (X'X)^{-1}X'Y$$

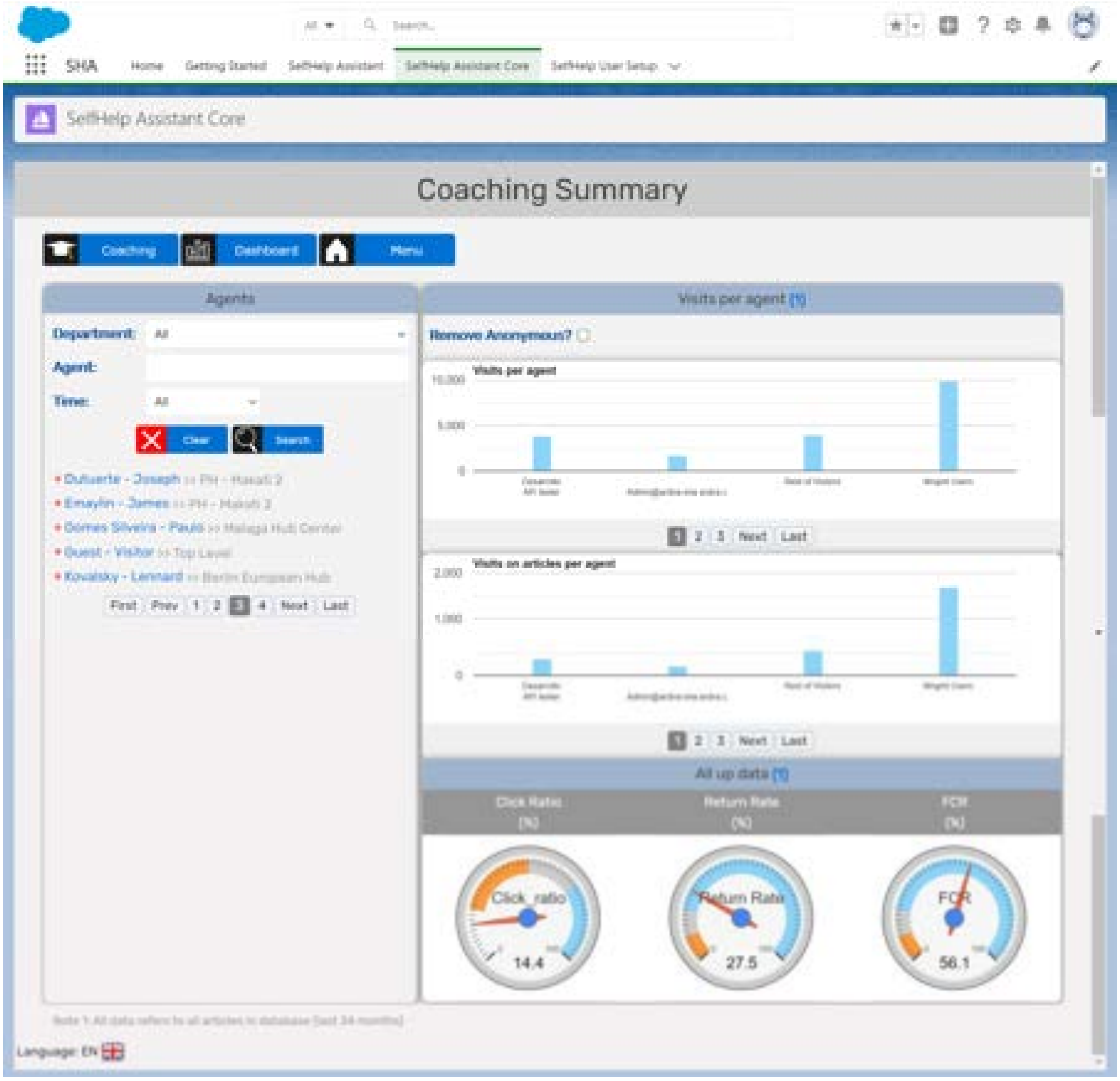
Where b is the coefficient matrix, X is the independent variables matrix, X' is its transposed matrix and Y the dependent matrix.

10.6- Coaching

The **Coaching** section is designed to provide a view of individual results, allowing a deeper view at the user level – article level. This individual interaction may be used in different ways, depending on the nature of the business. For instance, in the BPO arena, it may be used to drive training or first 90 days induction process, or even performance improvement plans.

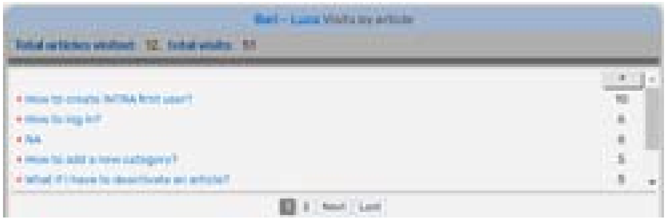
The overall view of the section presents on the left side the list of users with "visitor" privileges, and on the right side, an overall view of the visits per individual and overall results combining all user visits.

Users can be filtered by name, by department of by date of their last visits.



To access individual data, pressing on the username is enough. This will update the right section of the screen, where 5 new information sections will be brought:

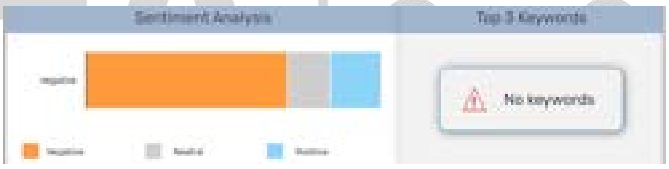
a) List of articles: this section shows the list of articles that the user has visited. It distinguishes visits to deleted articles as well. INTRA is not deleting data by default, just marking records as deleted. This may be important to avoid important data miss when looking into historical data. To select the data of each article, you may have to press on the article title.



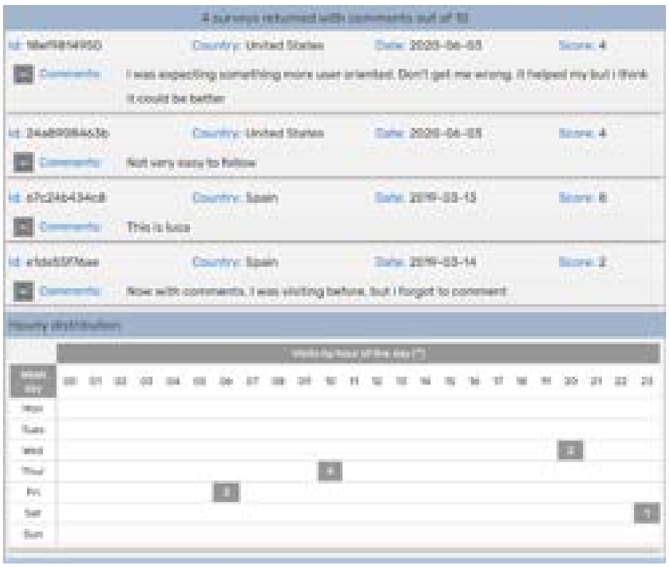
b) Time visit distribution: once an article has been selected on the prior section, the visit distribution is updated. Data may be presented for the last 13 days, the last 13 weeks, or the last 13 months, depending on the selection.

c) CX metrics: data for all the visits to this article done by user is summarized on these CX metrics: Return Rate, Customer Satisfaction and First Contact Resolution.

d) Sentiment & Keywords: Combining all the verbatims provided by the user on each visit, he overall sentiment is established, together with the top 3 keywords used by the user.

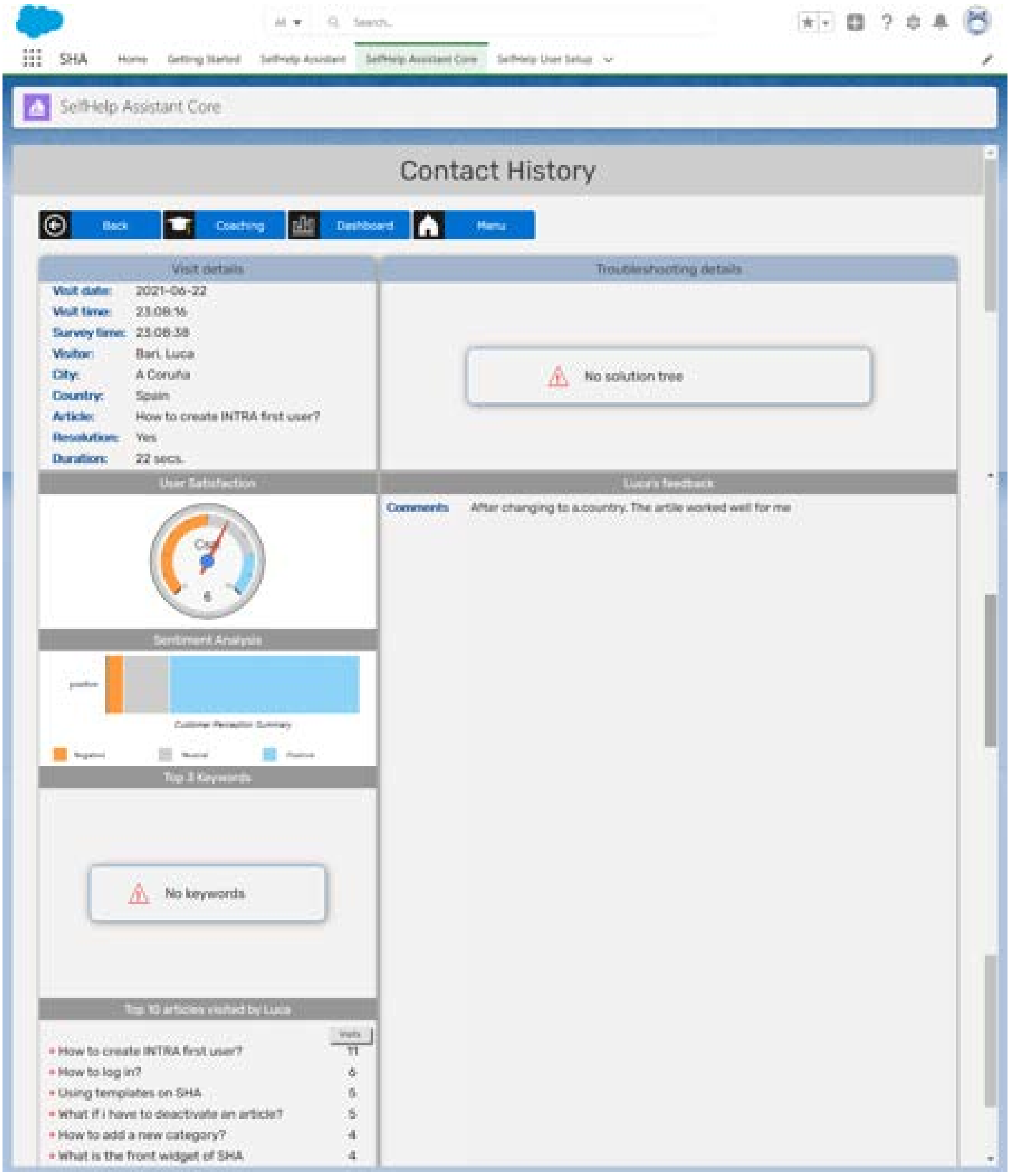


e) Surveys and time grid: Finally, the overall list of interactions is presented, besides the time greed when visits occurred. By clicking on the left icon for each survey, all detailed information will be presented as well.

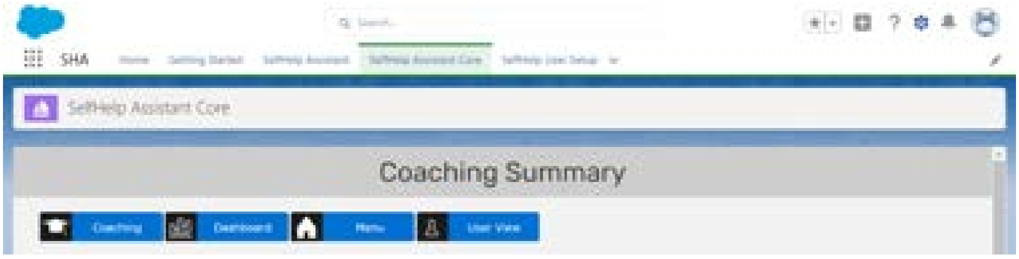


Additionally, a new section will be added to the navigation menu at the top of the screen, to deep div into the overall user view. It will be explained in a few moments.

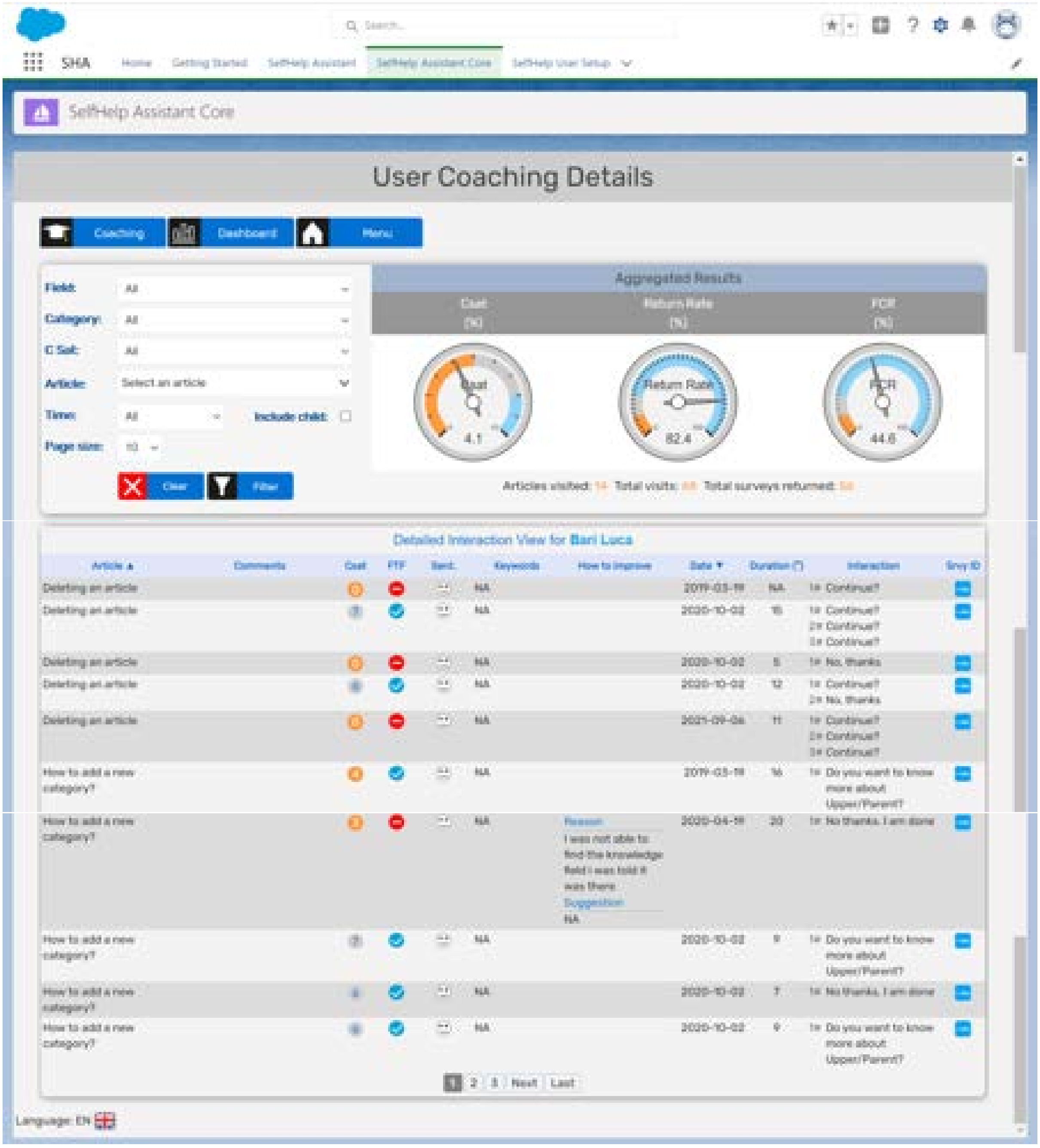
Pressing the left icon on each individual survey, additional details of the interaction are presented:



As mentioned earlier, the coaching summary menu changes when selecting a particular user, as follows:

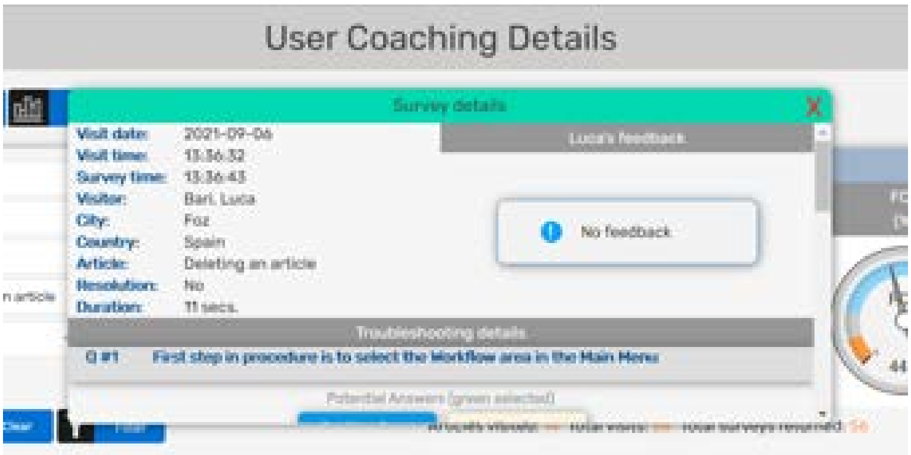


By clicking the **User View** button, all aggregated data for the user is loaded, providing great insight for coaching purposes:



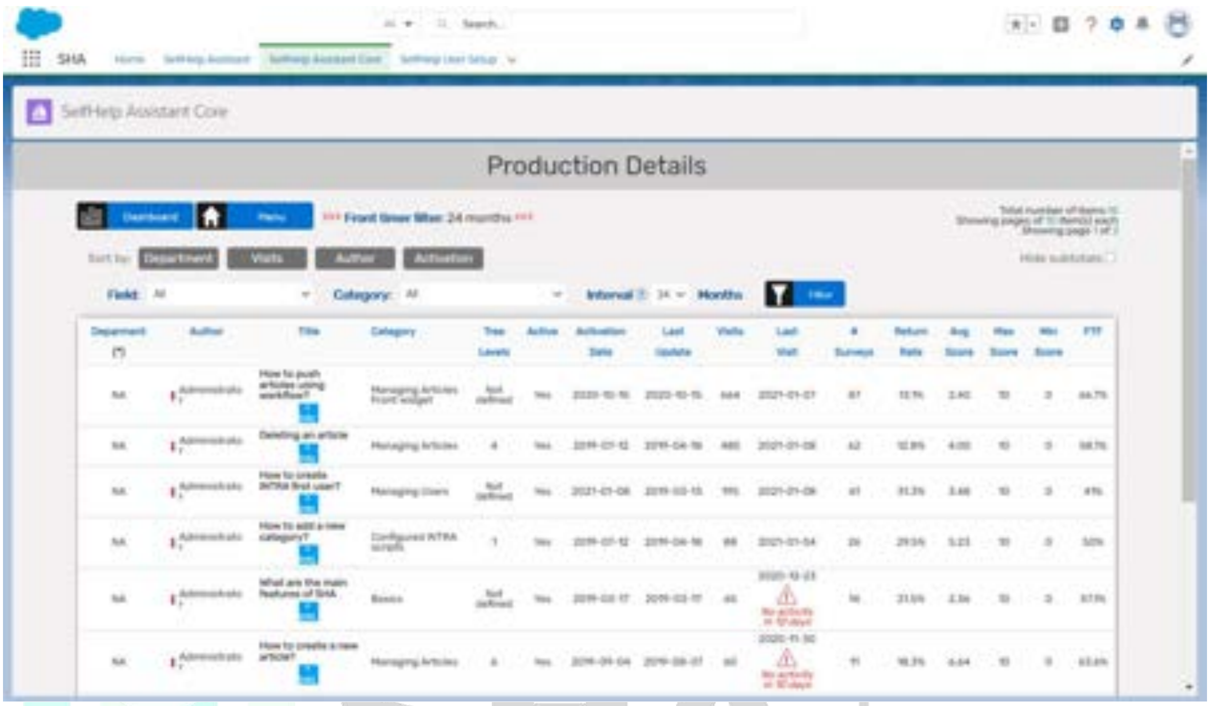
Despite you are familiarized with the filtering options of INTRA, in this section there is an important remark: aggregated result graphs show data for the filter applied only. This allows you to analyze user interactions from any perspective (Field, Categories, Customer Satisfaction, Individual article, Time Interval or a combination of them).

For each interaction, relevant information is brought to you, as well as a detailed view, available when pressing the icon **+Info**.



10.7- Production

Production section provides a double vision: on one hand, productivity of the different authors, and on the other, effectiveness achieved.



At the top of the screen, a navigation menu is displayed, which allows you to return to the main menu of the **Dashboard** section or return to the **Main Menu**.

Likewise, you can sort the information by *Department*, *Visits*, *Author,* or *Activation Date*. In the case of department or author sorting, subtotals can be shown or hidden.

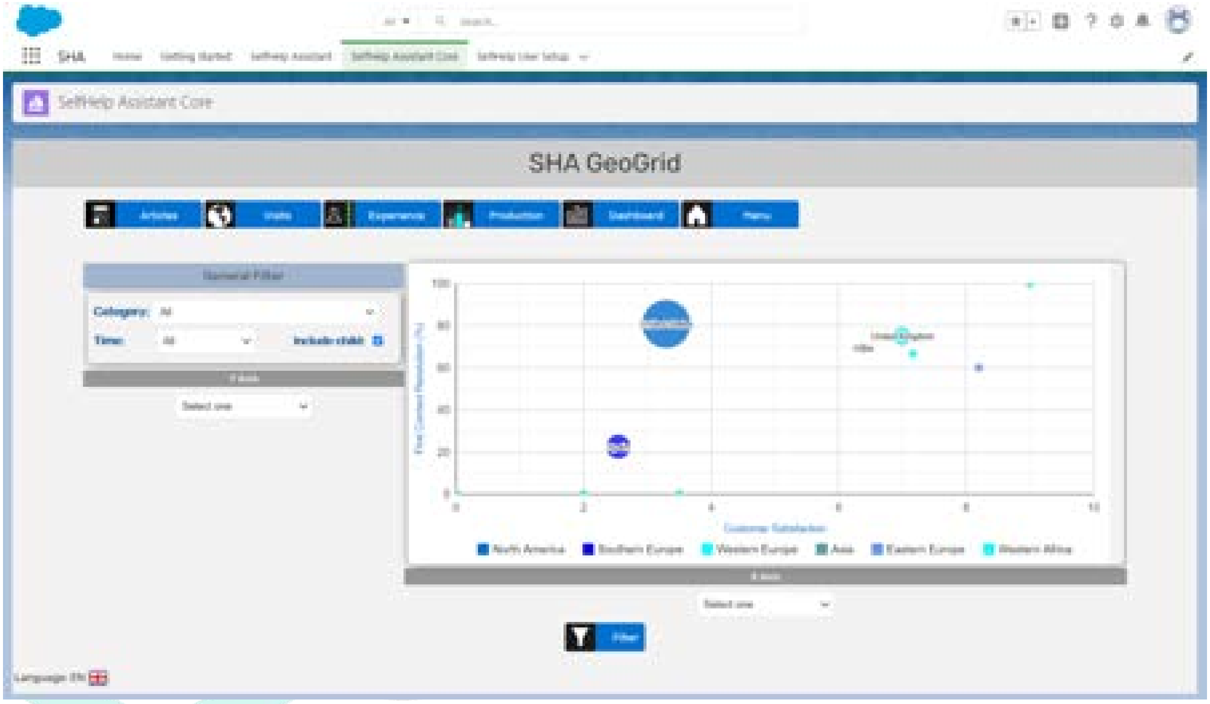
For each article general information is shown (*Department*, *Author*, *Title* -including *Knowledge Field*-, and *Category*), as well as the levels of the *Decision Tree*, dates of activation and last update.

Next, the number of visits received in the front end and date of the last visit are shown. Then the number of satisfaction surveys generated by visitors, **Return Rate**, understood as the% of samples received versus visits, average score obtained, minimum and maximum scores awarded by visitors, and **First Time Fix (FTF)** , or number of times the visitor declared that the article had solved their problem / complaint.

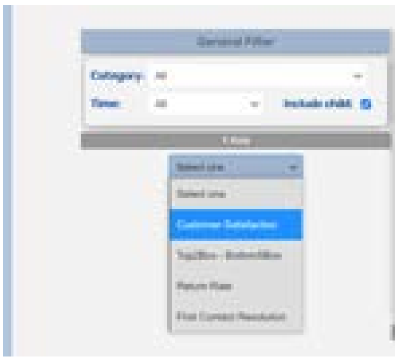
10.8- Geogrid

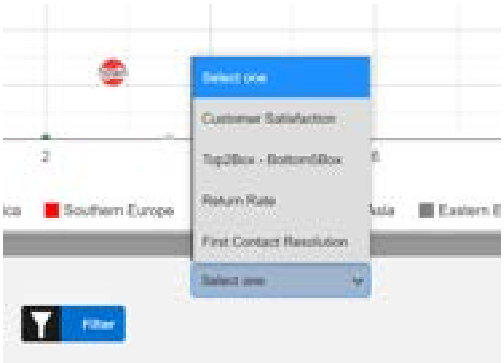
This section of the **Dashboard** allows users to compare couples of CX variables by geo of visitor. More precisely, data available is Customer Satisfaction, Top5Box minus Bottom2Box (NPS), Return Rate and First Contact Resolution.

The aspect of the section once you access it, is shown in the following picture:

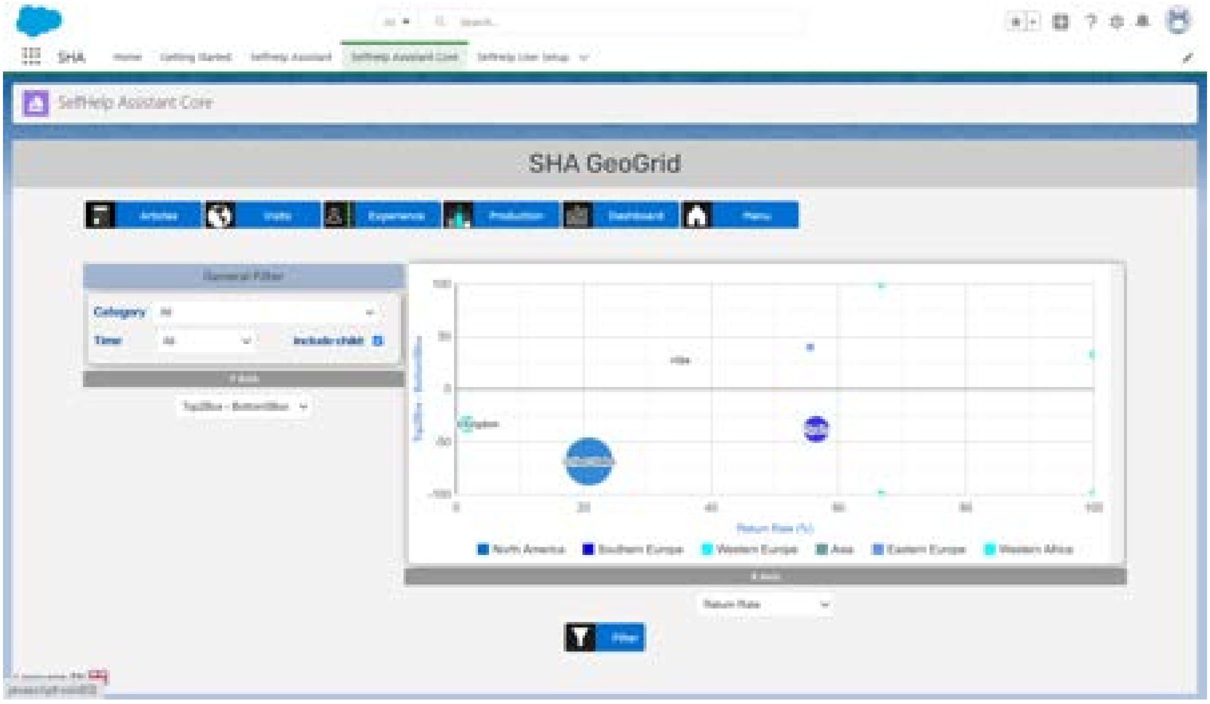


Apart from the navigation section in the upper part of the screen, you can see a filter section, where data can be filtered based on category of the article or date of the visits to consider. By default, the First Contact Resolution – Customer Satisfaction grid in shown. By hovering any bubble on the chart, you will have access to the underlying data.





By using the drop boxes, any couple of params can be selected and by clicking the **Filter** button, the resulting grid is drawn. This is the aspect of the grid for Top2Box – Bottom5Box and Return Rate combination:

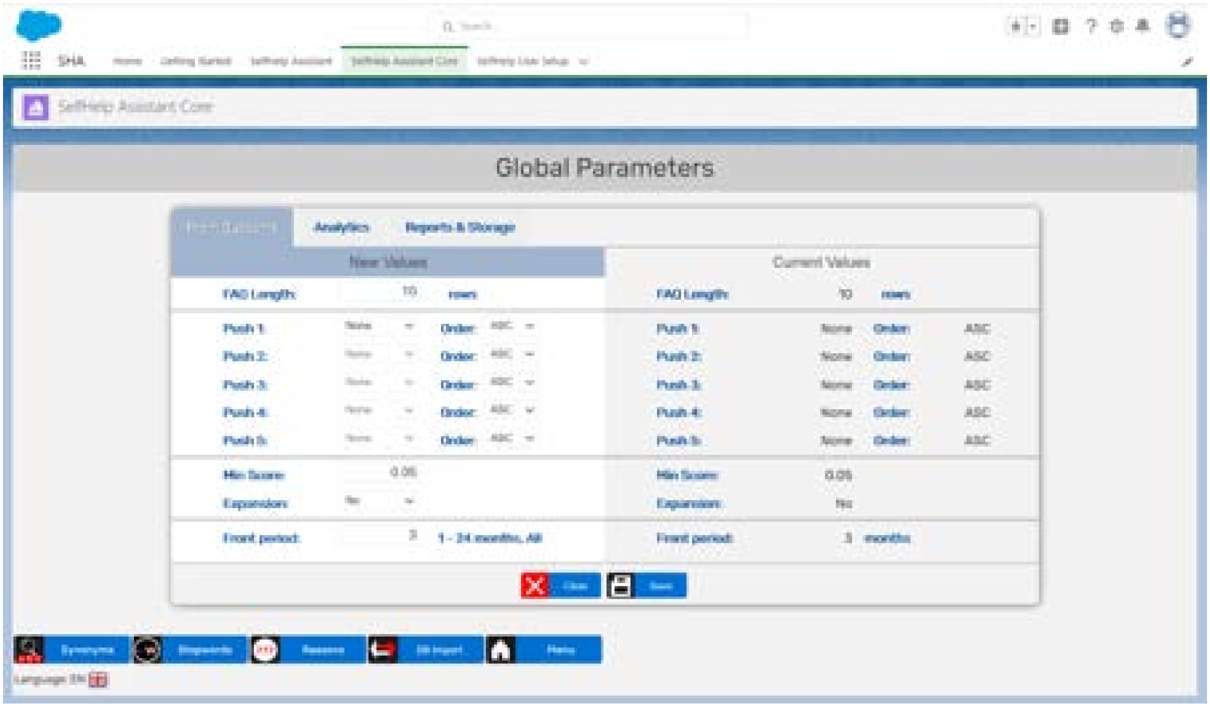

SelfHelp Assistant Core
SHA GeoGrid

11.- SHA Configuration

Most of the features included on SHA may be configured through a set of predefined parameters. To access the **Configuration** section, you will have to press the **Configuration** button on the **Main Menu**.

The section introduces a set a parameter, organized in three tabs, where you can define how SHA will behave. By clicking on the params tab, you can swap between parameters. Additionally, synonyms and stop words used by the search algorithm are defined in this section as well.

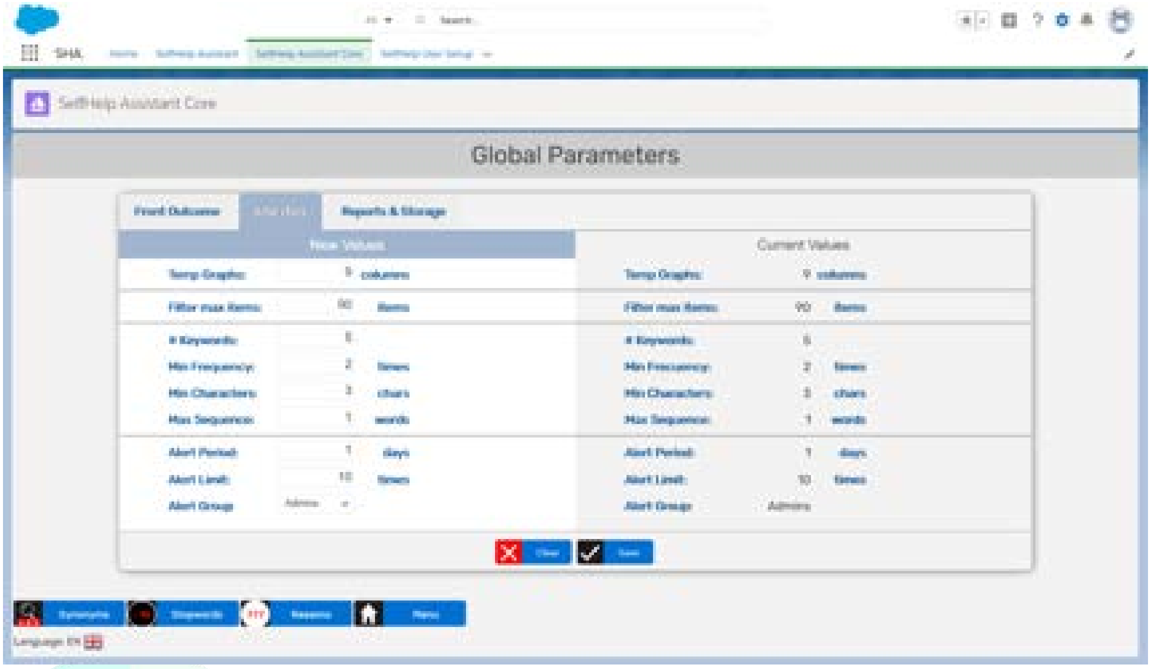
The first tab is **Front Outcome** and manages parameters what influence the outcome of the front-end widget.



- **FAQ Length**: this number determines the length of the article list on Front End main screen.
- **Push 1 – Push 5**: these five options define the sorting criteria when running articles queries on the Front End. Each criterion can be used once, so anytime you select one, it is removed for the available options for the pending "pushes". Available options are active days, average Csat, first time fix, # of hits, return rate, tree levels, # of article words.
- **Min Score**: this value defined the minimum score considered as relevant for Mysql full text searches. Front end queries are run using full text algorithm.
- **Front period**: this value defined the interval, in months, considered for stack rank calculations: visits, surveys and resulting scores.

On the right section of the screen, current values for each parameter are displayed.

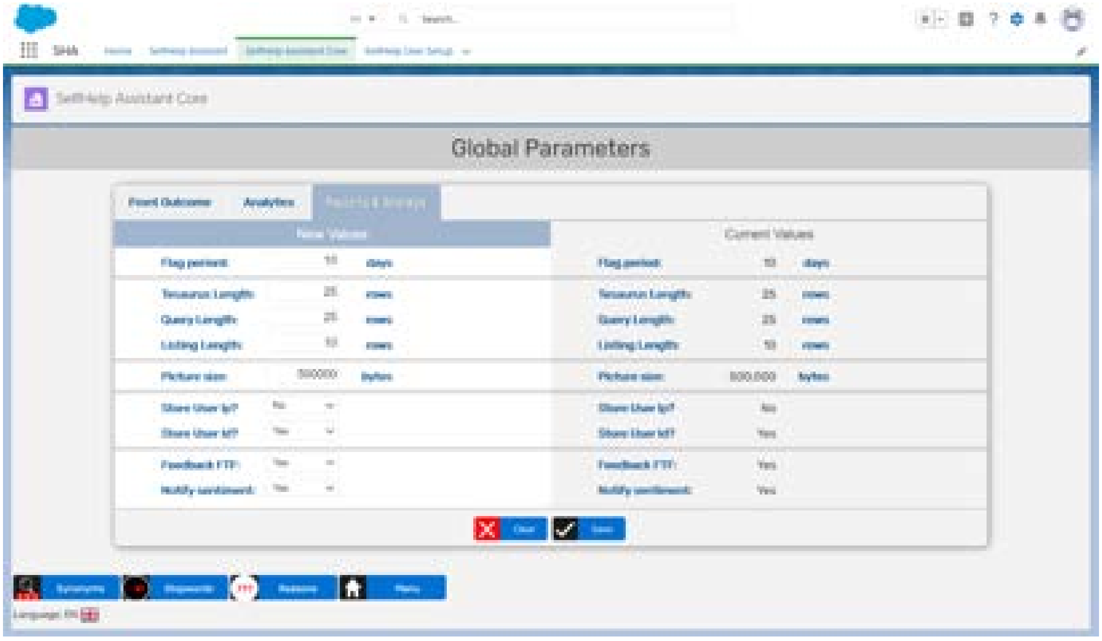
Second tab **Analytics** includes a set of parameters that are used for qualitative and quantitative analysis in the back end.



- **Temp Graphs:** defined the default number of columns for Csat and Top/Bottoms boxes columns charts.
- **Filter max items**: Defines the maximum number of feedback records that are shown in the **Experience** section when an article is selected.
- **# Keywords**: this parameter establishes the number of top keywords the script will present in the **Verbatim** section.
- **Min Frequency**: also, for verbatim calculations, this parameter defines the minimum number of times a word must appear to be considered as keyword.
- **Max Sequence**: determines how many words are considered for defining a keyword.
- **Min Characters**: this parameter sets the minimum number of characters a word must have to be considered on the keywords algorithm.
- **Alert period:** defines the interval between 1 to 14 days that system will be monitoring the volume of visits received by each article.
- **Alert limit**: defines the volume of visits that if reached during the interval defined on the previous field, will trigger the notification via mail to all SHA users selected, of a volume alert for article.
- **Alert group**: sets the notification group for volume alerts. It defines the minimum profile the notification will be sent to.

On the right section of the screen, current values for each parameter are displayed.

Finally, the **Report & Storage** tab manages a group of parameters related with general purpose activities:



- **Flag period**: allows you to define the time window used in Production section to flag when articles have not been seen.
- **Thesaurus (Category) length**: defines the length of reports for Category section.
- **Query length**: similar than previous parameters, defines the length of General Query reports.
- **Listing length**: with this parameter you define how many rows all SHA backend reports will have.
- **Picture size**: defines the maximum size of the pictures any user can upload into the application server. Pictures bigger than that parameter will not be uploaded.
- **Store User Ip**: indicates if application should store ip of front-end visitor. Default set up is no; in case of ip is stored, data will be encrypted.
- **Store User id**: same as previous parameter, this time for the user id, in the case the front-end runs on a page where users are authenticated. Default set up is no; in case of ip is stored, data will be encrypted.
- **Feedback FTF**: enables and disables the additional form at the from end to capture information on reasons why a visitor did not find resolution for the question/problem he/she was looking for.
- **Notify sentiment:** enables the mail alert system for negative sentiment; when this option is set to yet, every time a new survey is recorded, if a negative sentiment is identified, a mail will be sent to the article owner informing about the impact, including the survey id, in order to allow an immediate review of customer feedback.

On the right section of the screen, current values for each parameter are set.

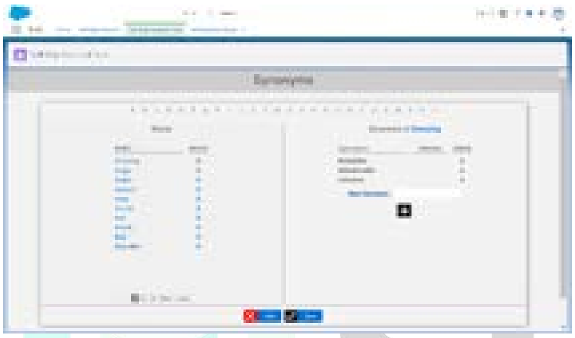
A any change made to these parameters will be stored by pressing the **Save** button.

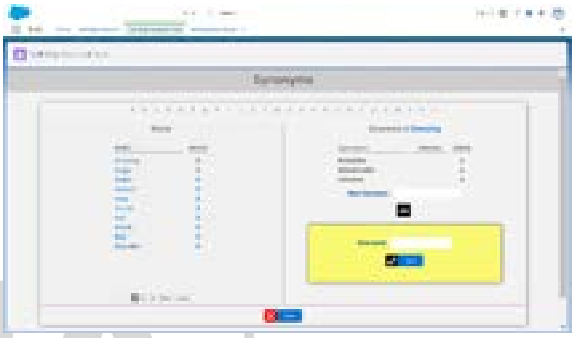
11.1- Synonyms Management

SHA INTRA includes business synonyms on the search algorithm. However, for simplicity a table has been included to identify those relevant words. As can be seen, navigation is very simple, and the basic principle is a that word may have several synonyms. We only must stablish this relationship using the synonym input on the right side of the section.

Once you start typing the system will search for the available words, and you will be able to indicate the relationship. To store synonyms relationships, the button **Save** at the bottom of the screen needs to be pressed.

In the case that the word you want to include is not loaded into the database yet, simply by clicking the "**+**" sign, and data entry form will pop up and new word will be stored but pressing the Save button located inside the form.

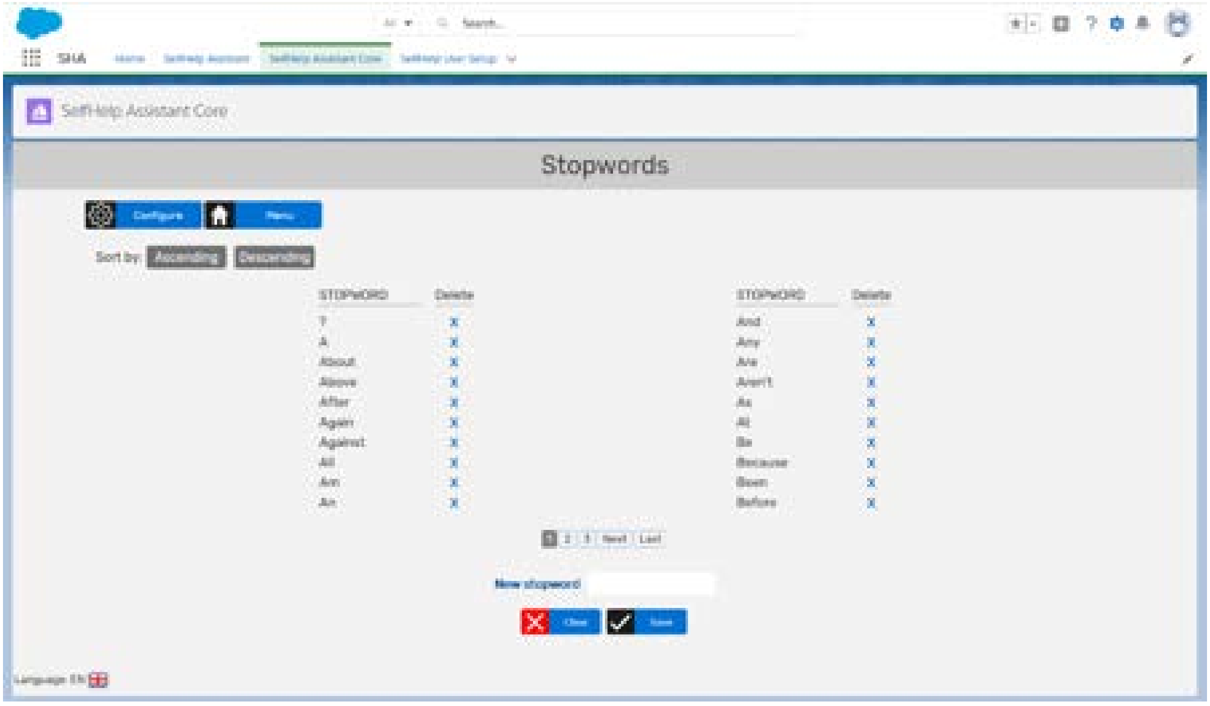




11.2.- Stopwords Management

While INTRA uses Mysql FullText search engine with all its features, managing stop words is very relevant to increase search accuracy. Instead of managing those words at the Msyql backend, INTRA incorporates another layer of words removal inside the search algorithm. This allows the tool to refine even further each search request.

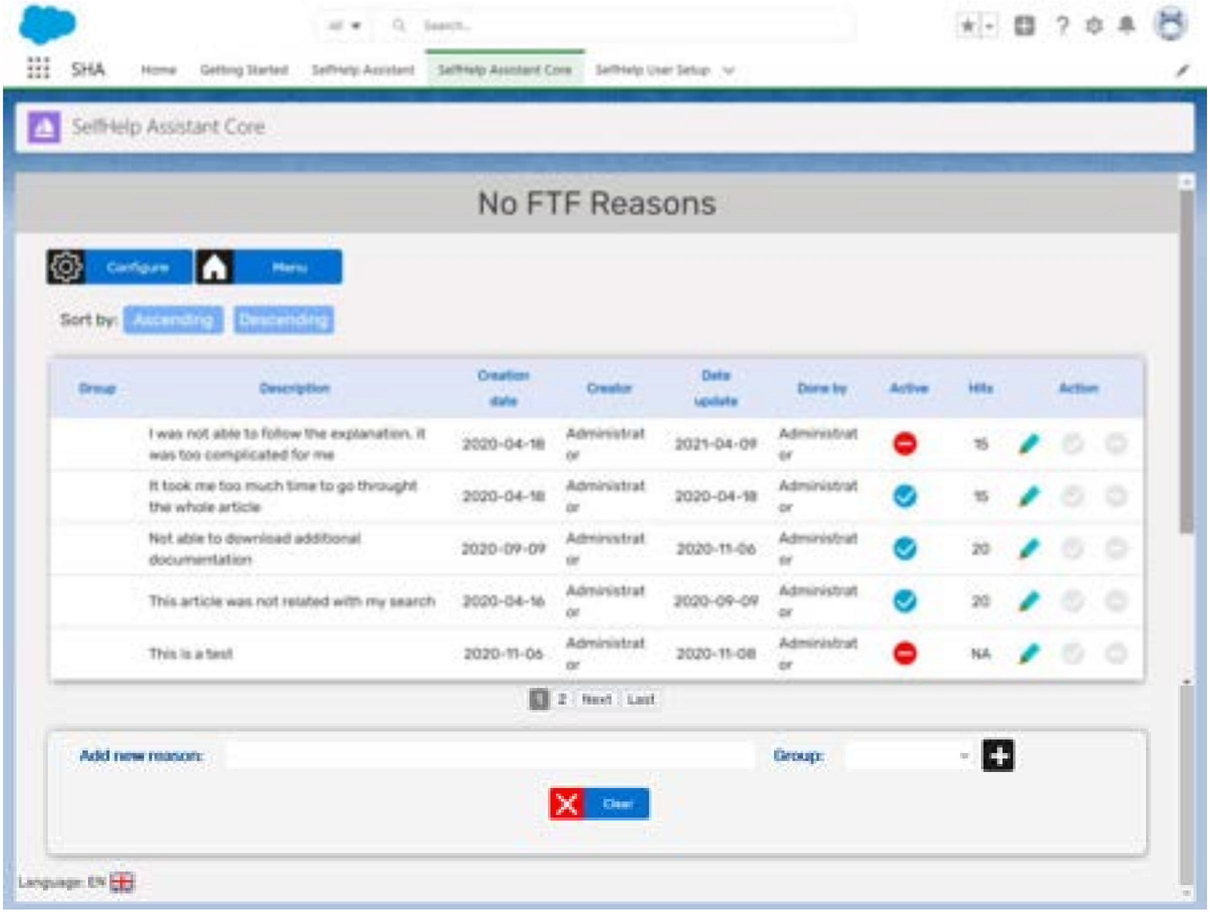
As with any other section of the application, there is a Menu button that returns to the Main menu of INTRA. Additionally, there is a hidden input area that is invoked through the Add button.



11.3.- Reasons Management

Intra provides the option of capturing additional information from article visitors when the feedbackFTF variable is set to “Yes”. In this case, an extended form will be shown in the front end when a visitor declares his/her visit as not first-time resolution (FTF).

To capture that information, the reasons for no FTF that will be used on that template are declare in this section, as shown in the picture below:



To add a new reason, you simply need to populate the “add new reason” input (4). If you wish to add a group that the reason belongs to, you simply need to populate the “group” input (5). If there is not a group that matches the new reason, you can add a new one by pressing the “+” button at the right. Pressing the **ADD** button will store that new reason into the database.

That new reason will not be active by default. To activate it you need to press on the "V" button (2). In the same manner, to deactivate a reason, you simply need to press the "blank" button (3). And to edit the item, by pressing on the Edit button (1), the edit screen will appear, with the aspect shown on the picture at the right. You are only entitled to change the "description" and "group" fields.

11.4.- Import

It is possible to import initial data from other KMS using the import feature of INTRA. Through this capability Knowledge Fields, Categories and Articles can be imported into INTRA. The format used for data import is **csv, comma separated**.

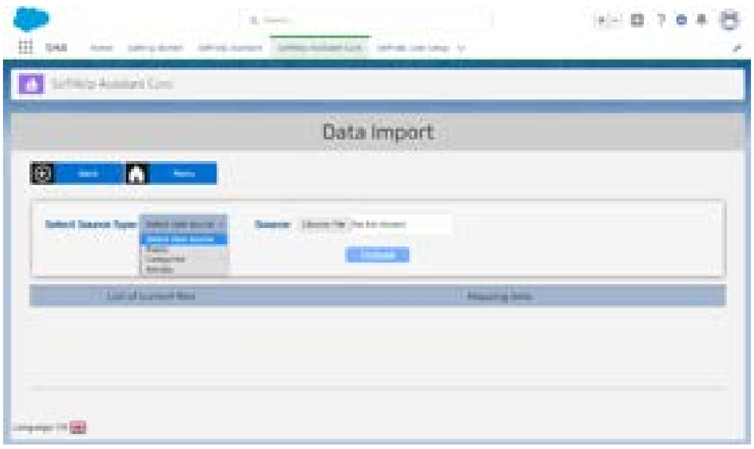
Note: only super users have access to the Import section.

Regarding the csv file structure, columns will depend on the table to be imported, according to the following guidance:

INTRA table	**Fields/Columns required**
Knowledge Fields	Item (name) (*) Description (*) Upper Field (parent field if any)
Categories	Category (name) (*) Comments (description) (*) Parent (parent category if any) Associated Field (Knowledge Field where category is included)
Articles	Title (*) Synopsis (*) Content (*) Knowledge Field Weblink (external link if any) Category 1 Category 2 Category 3 Category 4 Category 5

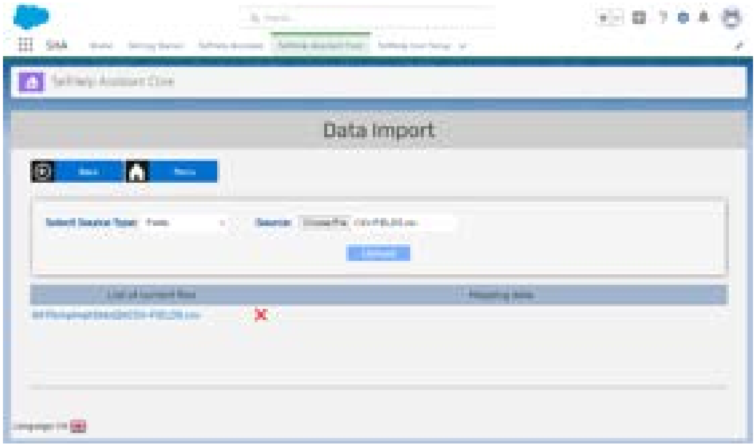
These columns may have data or be empty but there are mandatory fields marked with (*).

The process is quite straight forward and starts with the selection of the type of data to import as well as the corresponding CSV file.



Once the file is selected and after pressing the **Upload** button, the file will be displayed on the left of the screen.

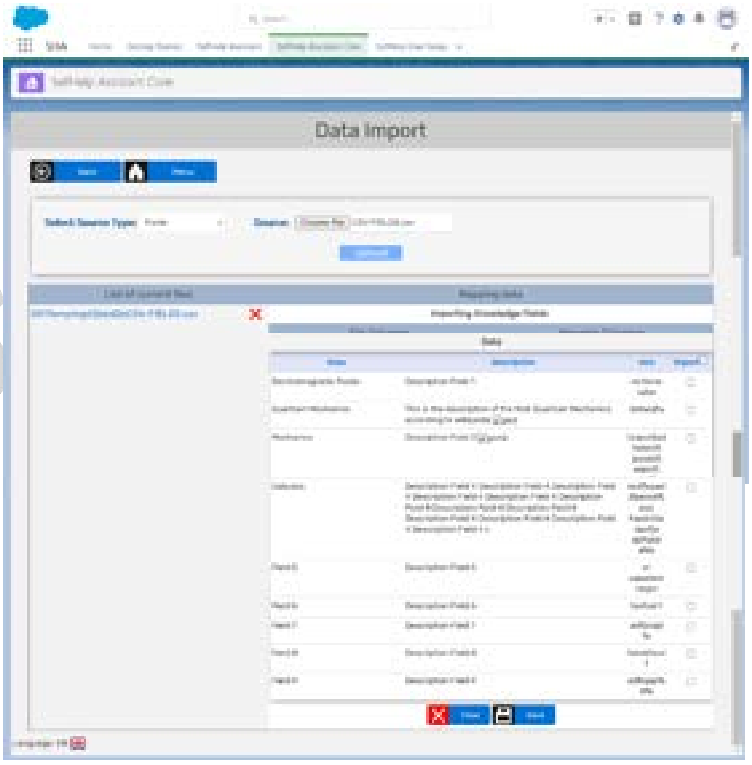
There is a delete icon by the file name to delete it, just in case any error has taken place.
That icon can be used as well once the import process has finished.



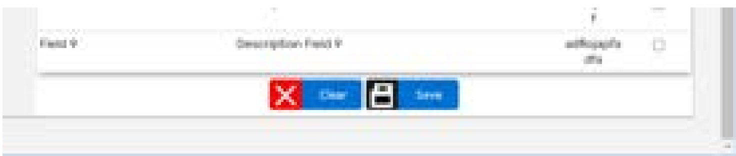
By clicking on the file name, all data is presented on the right part of the screen.

In first place you can see the name of the columns inside the csv file together with select boxes by their side. Those select boxes are used to map the csv colums to the INTRA table fields.

Note: import process will not be started until all the columns are mapped.



Once the columns on the csv file are mapped to the database table fields, you can select the items to import. In the case of fields and categories, you can run a bulk import, but selected all items simultaneously. After selection is done, you only need to press the **Save** button and items will be imported to the corresponding table.



The **Clear** button resets the items selection.

In the case of articles table, you don’t have option for bulk import, and article will have to be selected one by one. This is how the mapping section looks like in the case or articles.

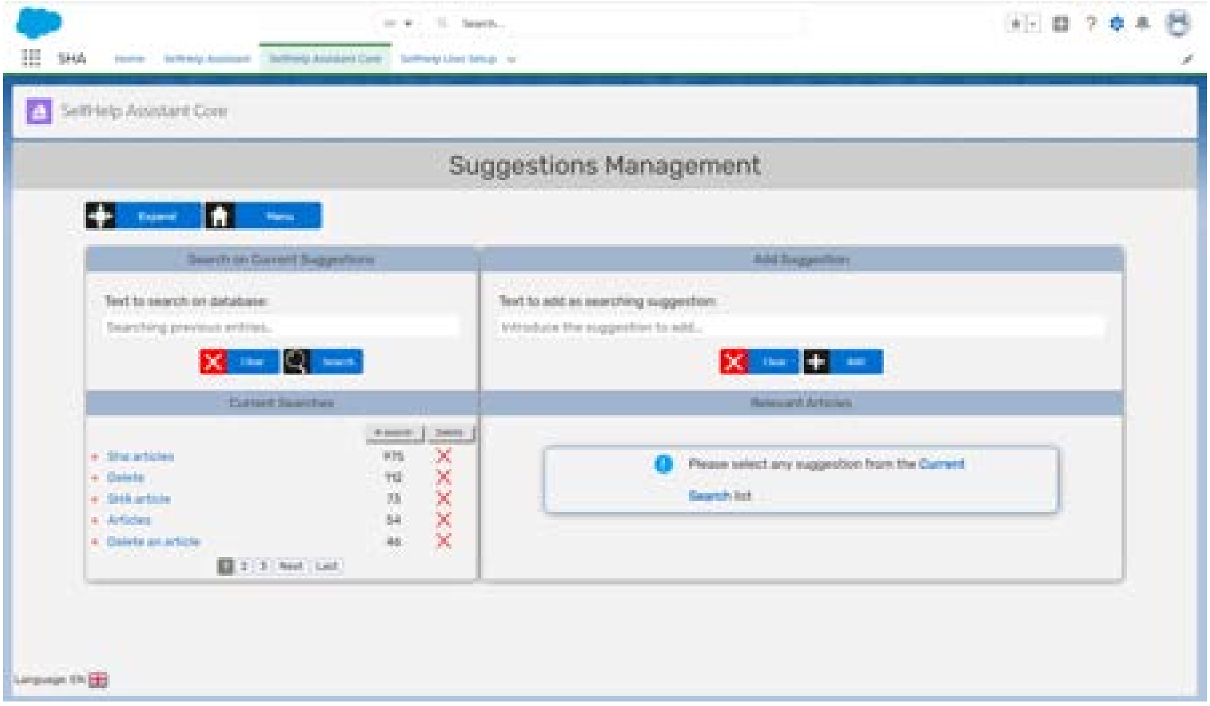
Note: if an article has already been imported, even if it was deleted, it will not be possible to reimport it again, due to security constrains. If that happens and you need to reimport any article again, please contact support@sha-saas.com.

12.- Suggestions Management

One of the most interesting features of SHA is the ability to create and manage suggestions. A suggestion is a piece of text, normally a question, that will be provided by the application when visitors search for something in the front end.

In fact, every search a visitor runs is stored, creating a kind of track record based on frequency. Besides, back-end users can add suggestion linked to database content that will be used as well as suggestions in the front end.

To illustrate how this section works, you may access in by pressing the **Suggestions** button on the **Main Menu**. When doing so, the following screen appears:

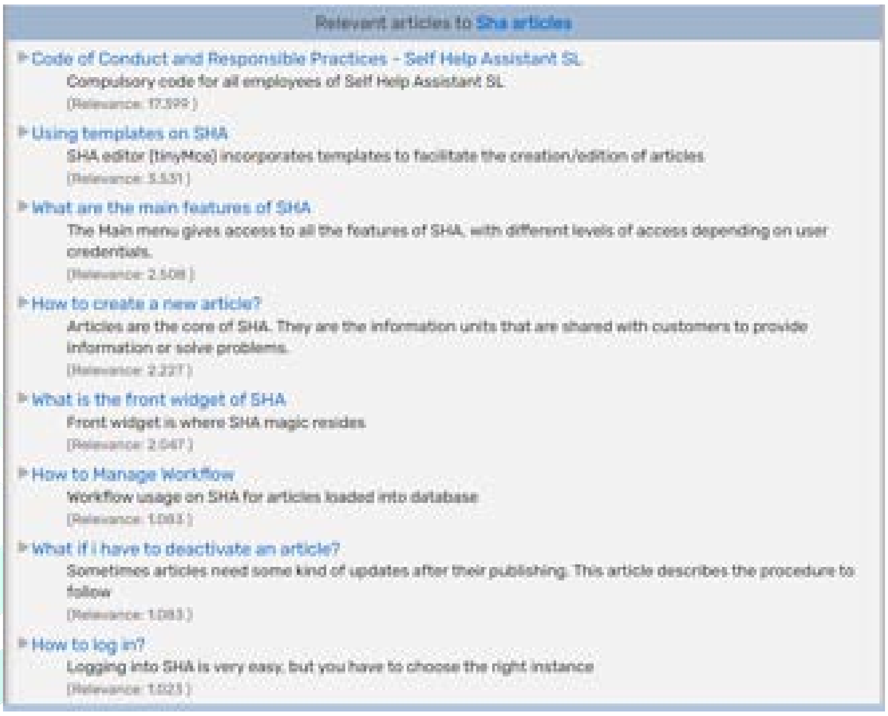


Though the screen is quite intuitive, there are a couple of hints you may need to be familiar with.

The top left section allows to search into current search database, to see if any particular question/string is already stored. For instance, if you type “how”, a list of suggestions already stored is presented. If you select for instance “how do I delete a user”, and press the **Search** button, searches already used by visitors will be shown in the bottom left section, as well of the frequency of each search.

Every search has a link that triggers a search into the articles database that will show how articles are related with that suggestions in terms of full text search relevance.

For instance, if you click “how to add a new user”, the bottom right section of the screen will look like the picture shown below:



Highest relevance article is “Code of Conduct….” with a relevance score of 17.399 followed by “Using templates on SHA” with 3.531 and so on. As an additional remark, please consider that relevance is calculated by Mysql using its internal algorithms, based on word size, stop words list, frequency and “noise”.

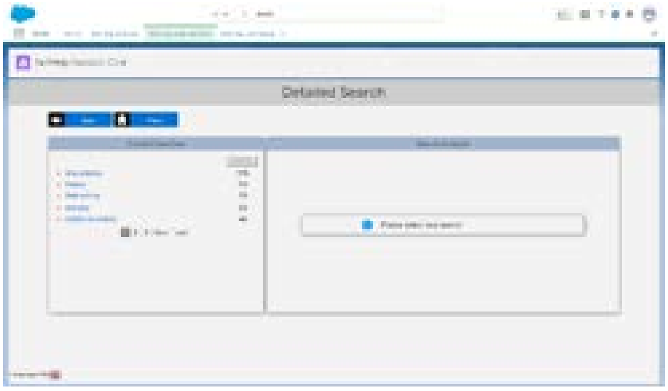
With this simulation you may see what the outcome of each search in terms of article relevance is. You can also add new suggestions to narrow the search for visitors.

Adding new searches on this section is quite straightforward, simply using the top right input text.

As you have already imagined, searches can be deleted by clicking on the red cross link, located at the right of each item.

12.1 Expanded Analysis

As you may have noticed, there is a button called **Expand**. When clicking on that option we can get a deeper view on customer behavior after searching.

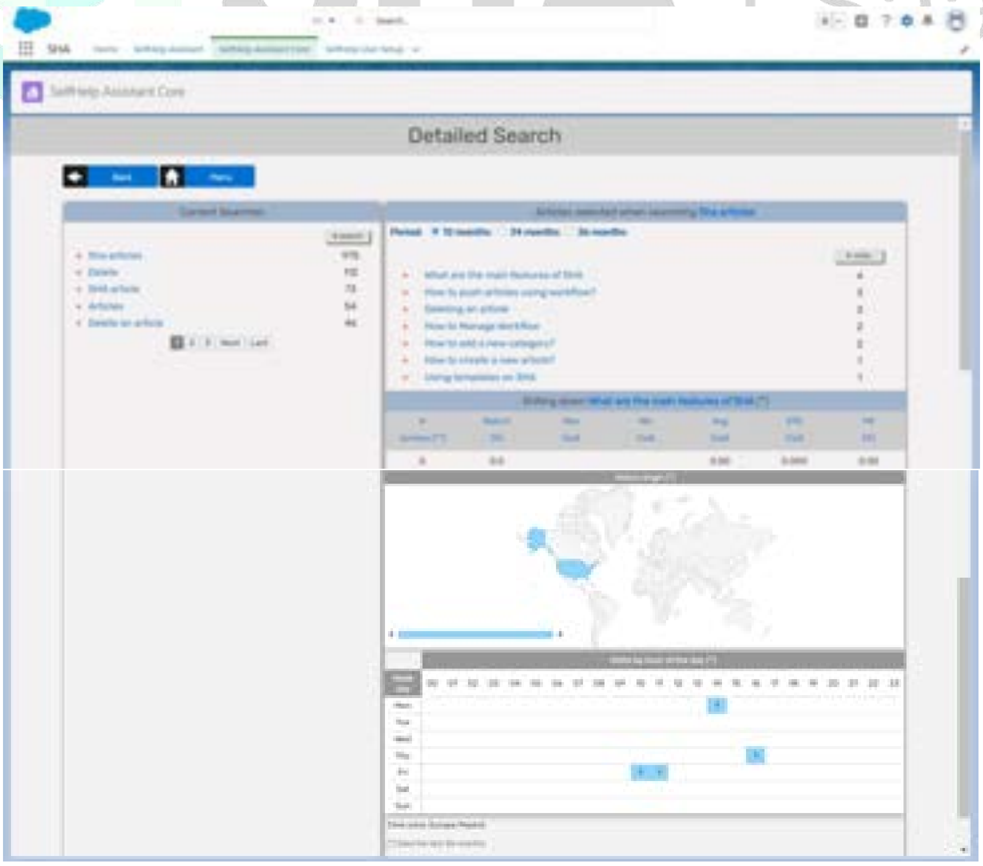


The screen on the left shows the initial view of the Detailed Search view where you can select the search introduced by customers you want to analyze. The column on the right shows the frequency of each search.

Selecting a particular search will show the articles customers selected from the results delivered by SHA.

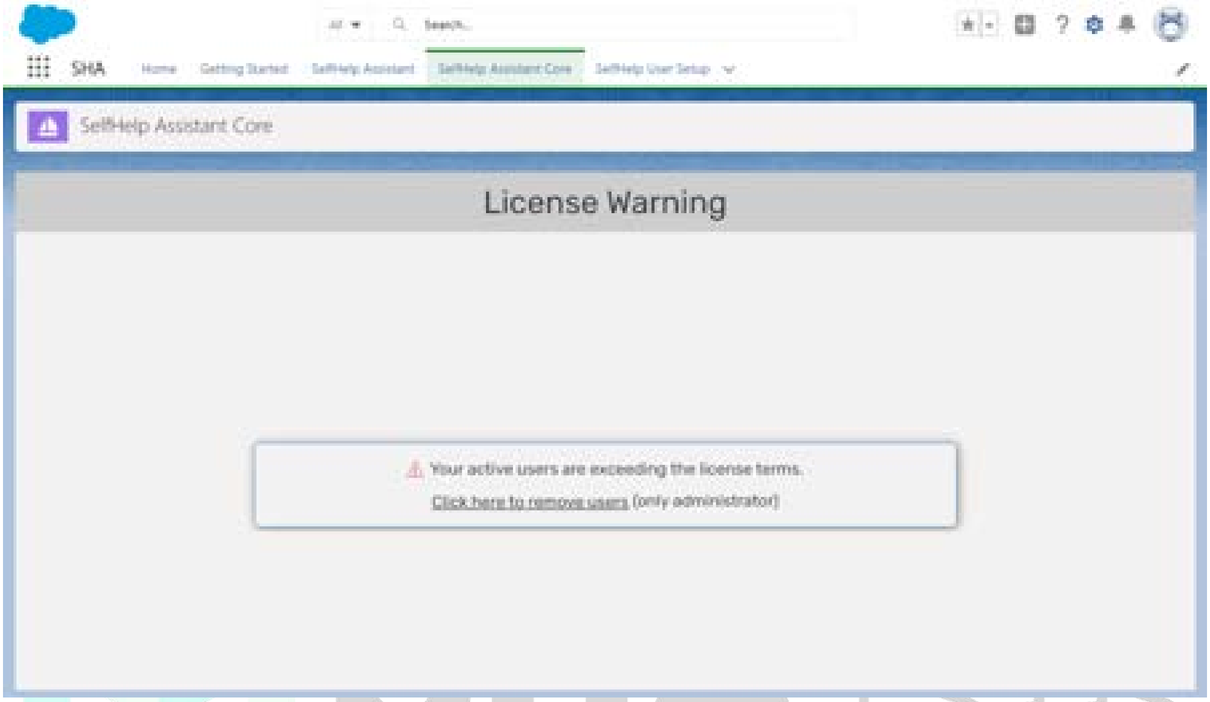
You will get information about distribution of the visits during the day, as well as the option chosen by customers on the troubleshoot of each article, as shown on left picture.

By default, you get the information for the last 36 months, but you can select data from 12 or 24 months as well.

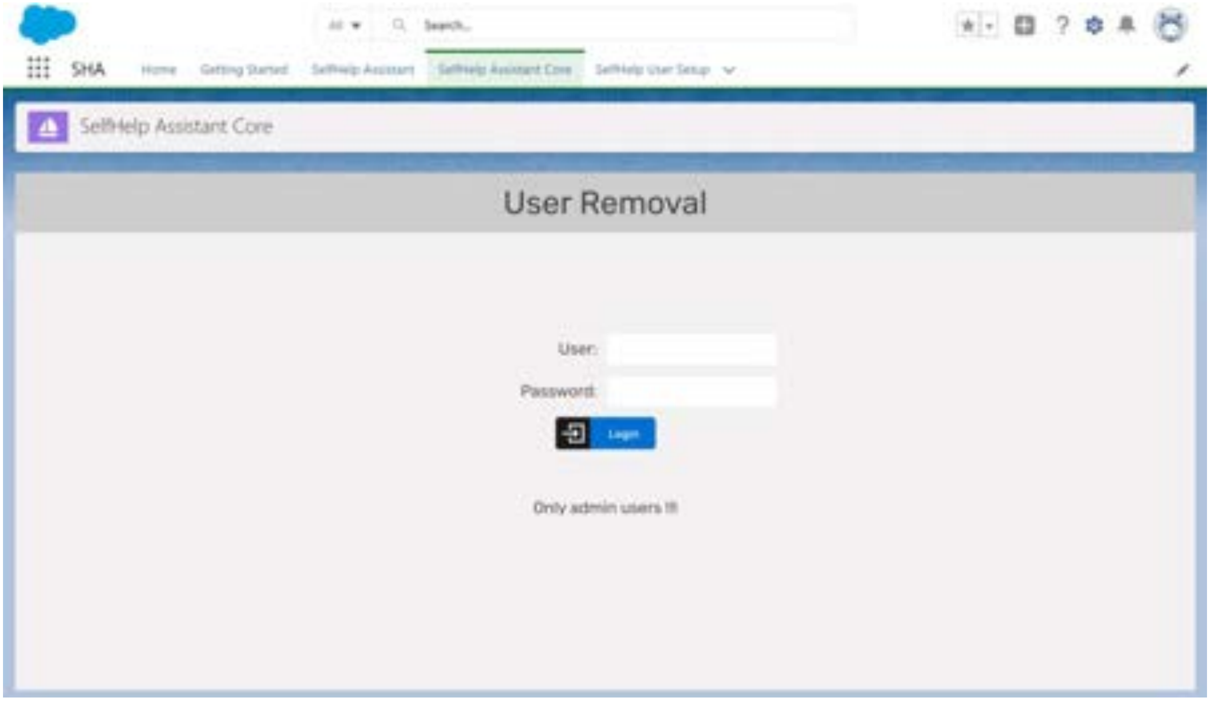


13.- User License Management

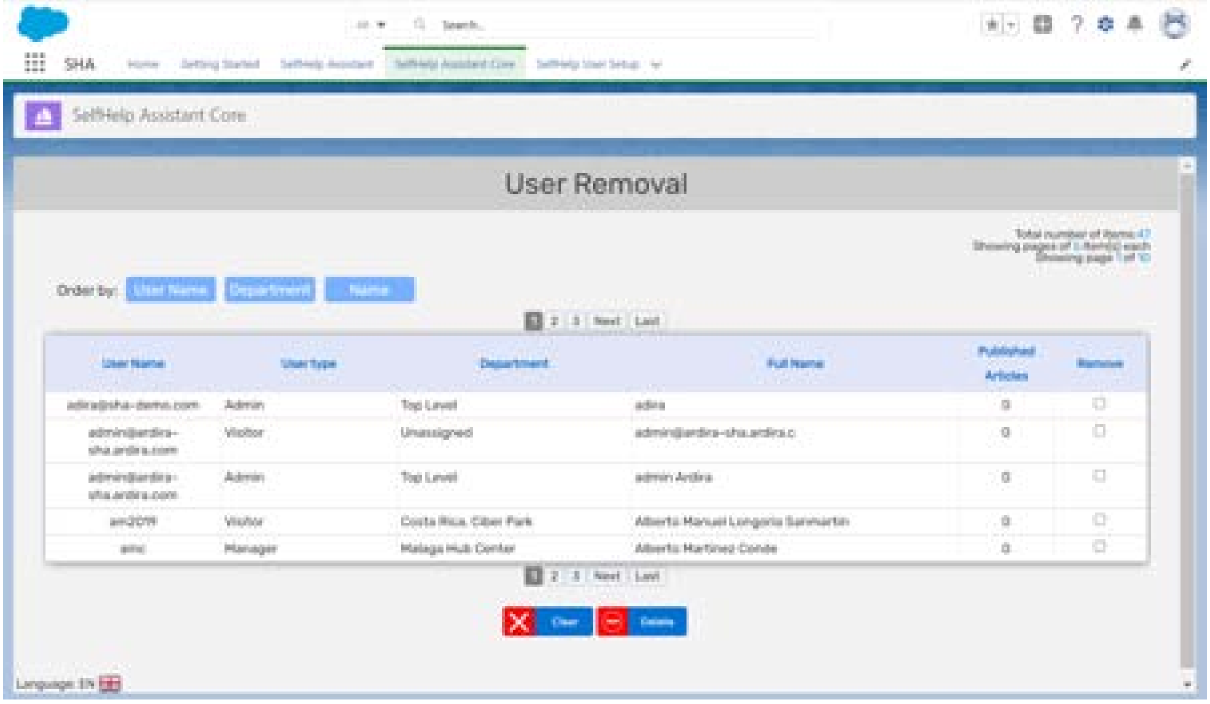
While overall user management is done via Salesforce, SHA uses an active user control system to manage access to the backend tool. Each installation of SHA has a maximum number of assigned users and when that number is reached, the next time a user wants to access the backend tool, their login will be prevented, as shown in the following screen:



System requires a login with administrator privileges in order to unlock access. This is done on the **User Removal** screen.

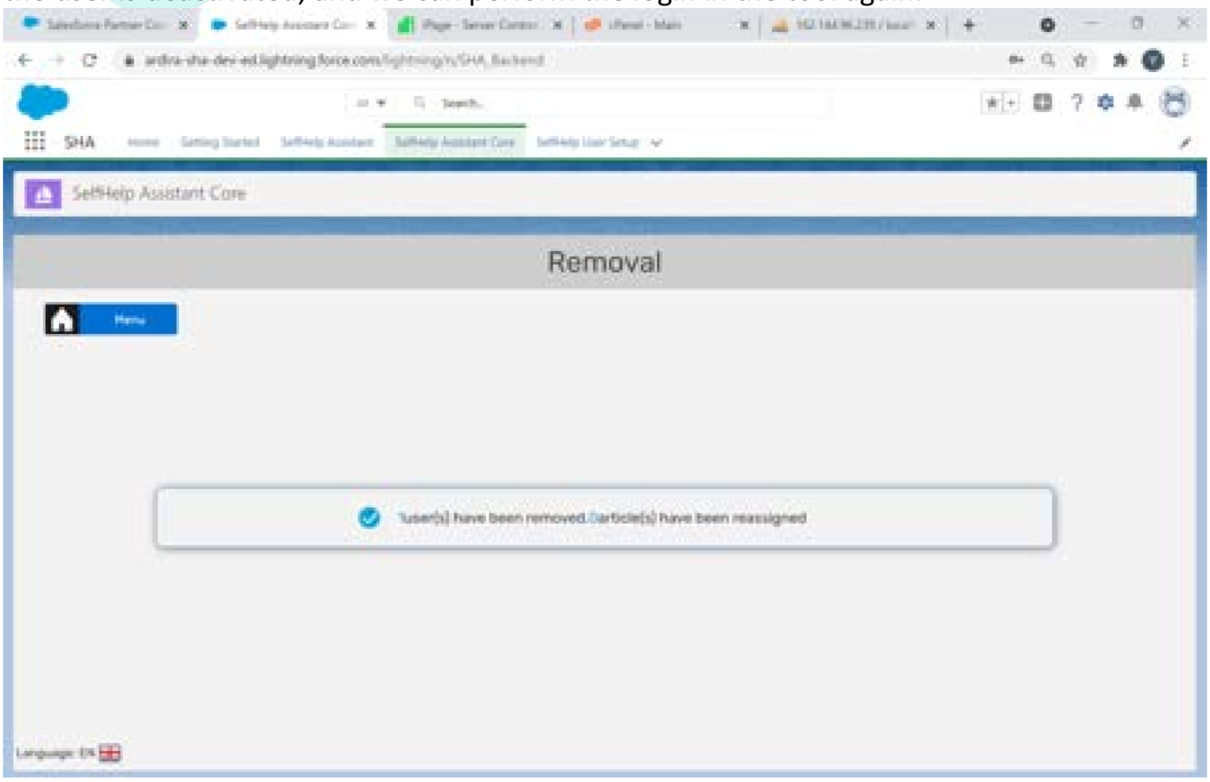


Once the User **Removal** section has been accessed, the list with all the active users and the corresponding details is displayed. To the right of each row appears a checkbox to select the users to be deleted:



It is important to note that the maximum number of users allowed is that which has been established in the conditions of implementation of the tool.

In this case, we are going to select the use “amc” and press the **Remove** button. Automatically the user is deactivated, and we can perform the login in the tool again.



APPENDIX

Top2Box / Bottom5Box (T2B5)

SHA implements a 10-steps scale to capture the grade of satisfaction of users with the articles provided. Inspired on NPS, this measurement compares the Top 2 Box responses combined against the Bottom 5 Box response, what is called T2B5 metric.

It is assumed that 10 and 9 ratings are provided by *promoters*, while 1-5 ratings are provided by *detractors*.

By using this categorization, managers can focus on a single metric rather than having to deal with and interpret the percentages of each individual scale step.

To illustrate how Top2Box/Bottom5Box works, please consider the following table which shows the results of satisfaction ratings from various visitors:

VISITORS	1	2	3	4	5	6	7	8	9	10
A										1
B		1								
C				1						
D					1					
E									1	
F							1			
G								1		
H	1									
I									1	
J						1				
SUBTOTALS	1	1		1	1	1	1	1	2	1

Notice that each individual rating is displayed in the table. You have 10 data points here and interpreting these results may be challenging. Imaging now that you have houndred of thousands of data points….. It will be a nightmare.

Using T2B5 metric, you can summarize overall value that illustrate how

Total # of 10 & 9's	3	% vs total	3 /10 = 30%
Total # of 1,2,3, 4 & 5's	4	% vs total	4 / 10 = 40%
Total # results	10	**T2B5**	**30 % - 40% = -10%**

As conclusion, a negative value represents that you have more detractors than promoters, so you customer experience needs to be improved.