A simple guide to creating a knowledge base (and keeping it running)

by Aprill Allen
Thanks

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Feedback

It's important that this book stays relevant and useful to you. If you think anything should be added please send your suggestions to aprill@devlogic.com.au.
In 1991 my mother took me to a careers psychologist. I was 16 and I had no idea what I wanted to be when I finished school. I did a bunch of quizzes, and after all the number crunching nothing definitive came out in terms of careers. Not like those people who were just born to be musicians, or athletes, or scientists. I scored high in administrative areas, and had an aptitude for originality. The psychologist's report insisted on me having some sort of creative career with an administrative angle, or I’d be unsatisfied.

I put the results in a, now dusty, file and forgot about them.

When I read back over that report now I laugh, because that’s exactly where my meandering career path has ended up. I went from a career in music retail to visual merchandising, to technical support, and finally to freelance copywriting. And while a lot of people find it hard to combine the creative with the technical, I managed to straddle both camps most of the time.

Before I became a freelance copywriter, I worked in IT for 13 years. During that time I supported operational roles across the Internet and finance industries. During my last job interview I said I enjoyed creating documentation in the quiet times, which got a few belly laughs.

But I was serious. And I got the job.
We’ve been through the Stone Age, the Bronze Age and the Iron Age. The history books may well refer to this current era as the Information Age. After all, since the 1990s we’ve had a whole science dedicated to knowledge management.

The collective knowledge in any organization is an asset, and should be recorded and maintained like any other. A knowledge base is a specialised database for collecting, storing and retrieving that knowledge as individual articles. It’s a repository of related experiences – problems and solutions, causes and fixes.

I started in operational support fresh off the Internet helpdesk. (This was the late 90s, when the Internet was still pretty new to most people.) I could deal with frustrated customers, dialup modems and login problems. But I suddenly had much more to deal with: a birds-eye view of the network, administration accounts on servers, responsibility for corporate customers, and an on-call phone.

I was in the deep end. And I had to learn to swim - fast.

Whenever I’m struggling with lots of new information I start writing it down. Writing it all in my own words gives me a document I know I can understand and refer to when I have a query. It forces me to make sense of the information I’ve been given, like a
student who summarises notes after class.

In those days, there was no escalation chain. It was just a handful of support staff and the engineers.

Now engineers are notorious for communicating in jargon and acronyms. They document with diagrams and long sentences. That’s okay for the design and development teams who understand it, but it was like a foreign language to me.

Over the years, I've learned a lot about networks and systems. I've also decoded reams of engineer-speak to create documents that both my support colleagues and our users could understand. I've always found that documenting procedures helps me remember them. And having an easy step-by-step reference to follow can really take the heat out of a stressful situation - no matter what industry you’re in.

**Why We Need it**

In my experience, the knowledge base is sometimes overlooked and often the last thing to have resources allocated to it. Instead, there may be multiple Word documents with overlapping details and obsolete information, or staff members with critical information locked in their own minds.

I measure the latter with a “truck factor”-- how much trouble your organization would be in if that person was hit by a truck (or went on vacation). It’s a fairly common metric, and is used a lot in industries that provide operational support.

A good knowledge base helps improve relationships. If it’s written well it can bridge communication gaps not only between departments, but also between the business and its clients. It reduces the time new staff spend in training, improves incident management, and helps you uncover automation opportunities via online self-help. If your business is about problem solving, chances are you’ve solved the bulk of those problems before. A good knowledge base will help you stop reinventing answers.

I think most people find creating a new knowledge base, or bringing multiple sources together in a single database, so overwhelming that they decide to stick with their less efficient system. This guide will make this sometimes thankless job a bit easier by showing you how to get started, keep the content clear and concise, and keep the ball rolling. It also explains the benefits of monitoring and analyzing how users interact with your knowledge base.
Before You Start

Choose Your Weapon

I’m assuming you have a knowledge base product installed, but aren’t using it effectively. It could be a wiki, a third-party knowledge management system, or even a collection of well-organised and maintained Word documents. Some of my ideas may work fine with your existing system, while others may need to be adapted to suit your knowledge base and/or circumstances.

Who’s Your Audience?

Who is the documentation for—your team, or the people you support? The language you use may be different depending on who needs to understand it.

If you are writing for your end-users, spend some time with them. Find out how they already do things, what they could do more effectively, and what they don’t know how to do. Interview them, observe them, and don’t take negative feedback personally.

Understand

When you take on the communicator role, you need to understand what you’re communicating. If the information doesn’t make sense, either go back to the source or ask someone else who knows the process well to explain it. Don’t be shy. When you make the effort to find out how the process works and explain it clearly and simply, you are doing everyone else a big favour.
Getting a knowledge base off the ground is a daunting task. (If you’ve already got your knowledge base running you can skip straight to the authoring part.) But as the old saying goes you eat an elephant one bite at a time, and it’s the same with creating your knowledge base.

Here are a few ideas to get things off to a good start.

- Nominate a single point of contact for adding new processes to the database (or changing existing ones) to prevent duplication. Ideally, this should be a role, rather than an individual.

- Decide on a meaningful system of category names and issue types. A committee may decide this, or it may be left up to you. Either way, ensure any category or issue names and descriptions are simple and can be understood by anyone in your organisation. These buckets will be used to sort, and potentially analyse, your collective knowledge. (More on that later.)
Here's an example:

- Create a glossary of commonly used terms and acronyms. They may be obvious to you, but think of the new person.

- Sort the existing documentation into workable chunks. A good order to tackle them in is:

  1. Fundamental processes and company information
  2. Commonly occurring issues
  3. Frequently asked questions
  4. Issues of lesser importance
  5. Trivial-but-useful.

You may want to break it down further into departmental- or system- related information and work your way through one chunk at a time. Some knowledge base systems will import certain document types, while with others you will have to copy, paste and edit as you go.
It’s unlikely, but if you have to enter reams of hard-copy information into a computerised knowledge base, flag each sorted pile with a coloured Post-it to denote importance. The traffic light system works well – do the red ones first, then orange, then green.
Most people who wind up managing documentation aren't professional writers. Indeed, most aren’t writers at all. They’re usually the newest employee, or the person who dislikes documentation the least. If you are one of these people, congratulations! The task of knowledgebase management was thrust upon you, and now you’re in charge.

But don’t worry. It’s easier than it seems, and with a few guidelines you’ll have this elephant digested in no time.
Clear and Concise

If you take in no other advice, at least make sure you are clear and concise. I gave you that rhyme deliberately, because I want it to stick. It’s the number one rule of business writing, technical writing, and any other kind of functional writing.

- In 1946 George Orwell said, “Never use a long word where a short one will do”. Despite the evolution of the English language, that statement still holds true.

- Keep your sentences simple and short wherever possible. A good test is to read it out loud. If you need to take a breath partway through, it’s too long.

- Knowledgebase articles are generally instructional, so they should be written in the present tense.

Avoid the Curse of Knowledge

When we know our processes and systems well, we often assume everyone else does too. We forget that some of our readers may not know what we’re talking about. Here’s how you can avoid that problem.

- As you write each article, imagine a new employee reading it. Have you left something unsaid that seems obvious to you, but wouldn’t be to them?

- If you’re in the support business, write from the end-user’s perspective. How would they describe the problem?

Just the Facts, Ma’am

Some organisations, particularly in the finance industry, can be subject to rigorous auditing. A third party may review your process documentation for compliance. If your knowledge base allows it, you may also have the option of publishing articles to an online self-help for end-users.

The last thing you want is for a derogatory comment to be published.

- Stick with describing the facts. No in-jokes and no opinion.
**Bust the Jargon**

The industry or organisation you are in may use a lot of jargon. While it’s acceptable sometimes, try to avoid it as much as possible to avoid confusing your readers. If you must use it, provide a quick reference guide to commonly-used jargon and acronyms.

**Make the Connections**

Some knowledge base systems let you reference related articles. Hyperlinks and “tooltip” links are even better. If yours has this feature, use it! **Make it easy to gather supporting information.**

- Link to definitions, contacts, other related issues and articles, and external websites with relevant information.
- If you can, attach photographs, screenshots, maps or other documents that help describe the problem or environment.

**Responsible Tagging**

All online knowledge base systems are searchable—even simple Word documents. So give each article you write a relevant, meaningful heading and use the words people are most likely to search for. More advanced systems will let you nominate keywords in a separate field and classify the article with category or issue-type tags. Always choose the most relevant tags, and if it doesn’t exist see if you can create it.

**Easy to Read Formatting**

There’s nothing worse than squinting your way through an article with multiple colours, multiple fonts and crazy formatting. Careful formatting and adequate white space between chunks of text makes your article easier to read.

- Stick to one style of font in black and opt for one other colour to highlight important points.
- Blockquote a command list to set it apart from informational text.
- Don’t just cut and paste haphazardly. Invest the time to reformat it.
Many procedures involve several steps. Depending on your reader, consider how granular those steps need to be. Break them down accordingly, and define each step clearly.

**Tip**

If you are part of a problem-solving team, or you expect others in the organisation to create knowledge base articles, consider creating a style guide. A style guide lays out the set of standards for designing and writing documents. It ensures consistency within the organisation, and makes creating and maintaining documentation much easier. Sitepoint has a terrific article about developing a style guide.
You’ve caught up with the backlog of information, and it’s all now documented in your knowledge base. Phew! Now you can go out to lunch. But before you do, you need to know a bit about maintenance so you can hit the ground running when you get back.

Knowledge Base Articles Have a Life Cycle

To begin with, articles are *in progress*; a problem exists without a solution. When you have the solution and the information, you *draft* an article. Depending on your organisation’s hierarchy it may need to be *approved*. Then it’s *published*, and it can be used by your team and/or viewed by users or customers. Finally, a new development or product is released and it’s no longer an issue—the article is *obsolete* and can be archived.

In progress → Draft → Approval → Publish → Obsolete

- Check your articles regularly, and archive any that have become obsolete. This ensures all published information is current, but archived articles can still be referred to.
Feedback on your documentation is useful. Your system may have features that let you track it with comments, ratings on individual articles, or both. If it doesn’t, it’s worth creating a short survey to give users the chance to comment.

**TIP**

Select one day of the week where you check for new feedback. Overhaul any that have been flagged as unhelpful and address any comments.
It’s worthwhile analysing the content of your knowledge base and how it’s used. However, it isn’t much use if you’re reporting with inaccurate metrics. This is where your category names and issue types matter.

- With reliable analysis, you will see what sorts of articles are referenced most. Once you know that you can start tailoring articles for online self-help (if you don’t already).

- By monitoring similar problems and solutions you can track down root causes and resolve them permanently.

- Necessity is the mother of invention. Noticing common issues and complaints can lead to developing new and better products and features.
I’d like to leave you with two fundamental points about documentation management: *don’t panic* and *remember your reader*.

These two points should help you to stay calm, concise, and in control of your corporate knowledge.

It really is worth the investment.