Next Generation Knowledge Management at IU with Kuali KMS

An update on the future of the IU Knowledge Base

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Agenda

• Poll the audience
• Overview of current system
• Using what we’ve learned to what’s next
• Kuali KMS – The Next Generation KB
• Update on Phase I timeline
• Selling the value
• Q & A
Overview of legacy KB

• The IU Knowledge Base (KB) has more than 20 years of rich history serving IU and beyond.
• Initially shared files created by Support Center consultants, later moved to the web. First version evolved 1988-1995.
• KB2 March 6, 1996
• KB3 July 2002
Overview of usage statistics

- Over 16,500 documents
- 5,800 of those actively managed
- ~2,000 documents answer 80% of the questions
- 100+ service providers (SMEs)
- ~200+ edits per week
- Updates publish every half hour
- 18-19M page views annually
One KB, Many Faces (interfaces)

- Search or navigate at kb.iu.edu
- Navigate the OSE at uits.iu.edu
- Oncourse Help Tool
- Web Services API (SOAP/REST)
- Sakai KB & Help Tool
- TeraGrid KB
- IU Knowledge Commons wiki.iu.edu
- IU Mobile – m.iu.edu and apps
Using what we’ve learned

• IU has been a leader in this space for 20 years
• Deliver the information people need, when and where they need it
• Lifecycle management of content
• Single source information
• Others want what we have
Knowledge Centered Support

• Focuses on knowledge as a key asset of the customer/technical support organization
• Assumes the best people to capture and maintain support knowledge are the people who create and use it every day
• Thus, the identification of content and its collection is driven by demand and usage
The Four Tasks

• **Identifying** what information is needed
• **Collecting** needed information
• **Maintaining** the accuracy of that information through its logical lifecycle
• **Making** that information accessible when and where people need it
Requirements of the KMS

• Allow for knowledge capture during support problem-solving
• Enable and enhance collaboration among information providers, information managers, and consumers
• Provide for flexible management of content through a logical lifecycle from creation through archival
Requirements of the KMS

• Serve as a repository for rich, modular content that can be reused and delivered via many interfaces
• Deliver insight into how the content is being consumed and used, continually informing its management
• Provide the potential for meeting the best-practice needs of knowledge management (e.g., security, access, revision control)
What is Kuali?

Kuali is a growing community of universities, colleges, businesses, and other organizations partnering to build and sustain open-source software for higher education, by higher education.
Kuali KMS

• First module of the Kuali IT Support incubation project
• Can benefit all Kuali partners as a platform for developing, managing, and sharing support content for all Kuali software
Phase I – Timeline

• Oct-Dec 2011: Testing, refinement, and UI/UX review
• Jan-Feb 2012: Finalize code changes and documentation
• Mar-Apr 2012: Data conversion and training plan
• May 2012: Initiate pilot use
• June 2012: Migrate from legacy KB
Selling the value

- IU has rich culture which supports this model but can be expanded
- Other institutions need to develop similar culture – where to make inroads?
- Demonstrate value through delivering content where people need it
- Porous system – easy to get content in and out, enterprise workflow for management
- Demonstrate value of lifecycle management
Q&A and Resource Links

- [http://kuali.org/kms](http://kuali.org/kms)
- [http://kb.iu.edu/data/azgk.html](http://kb.iu.edu/data/azgk.html)
- Talk to Chuck – [caikman@indiana.edu](mailto:caikman@indiana.edu)
Appendix (optional slides)

- Multiple presentation options – examples
- How Kuali KMS maps to Empowering People strategic plan
- Goals for users of the KMS
Multiple Presentation Options

Oncourse Calendar tool

Using Oncourse Calendar, how do I add or delete a field on my calendar?

Note: To complete these procedures, you must be assigned a role having the necessary permissions. To determine your role, follow the directions in Participant roles. To view a list of permissions associated with a given role, see Permissions, roles, and tools. For a basic understanding of roles and permissions, see Permissions and roles: Overview.

Using the Calendar tool, you can add custom fields for your calendar.

Sakai Schedule tool

Using Sakai 2.7, how do I add or delete a field on my calendar?

Note: To complete these procedures, you must be assigned a role having the necessary permissions. To determine your role, follow the directions in Participant roles. For a basic understanding of roles and permissions, see Permissions and roles: Overview.

Using the Schedule tool, you can add custom fields for your calendar. For example, you might want a field for specifying an
Oncourse Help Tool

Calendar

Overview

Calendar allows instructors or site organizers to post items in a calendar format. The calendar has day, week, month, year, and flat list views. More...

How do I?

Feature demonstrations

The feature demonstration will open in a new window.

- Posting a calendar item

Documents

- Adding, editing, or deleting Calendar items
- Adding or deleting calendar fields
- Viewing the details of a calendar item
- Importing a calendar
- Changing your calendar's view
- Printing your calendar
Alternate titles for context

kb.iu.edu  uits.iu.edu
Multiple Audiences

IU Researchers

TeraGrid Partners

How do I apply for a new TeraGrid allocation?

Note: A TeraGrid allocation is not an account. An account is the specific method individuals use to log into resources to use the time or space granted in the principal investigator's allocation. A principal investigator can add users to an existing allocation via the TeraGrid User Portal, see How can I add or remove a user from an existing TeraGrid allocation?

Before applying for a TeraGrid allocation, you should determine whether your project will need more or fewer than 30,000 Service Units (SUs). If you are unsure, follow these steps and request 0 - 30,000 SUs. These directions are designed to meet the needs of first-time TeraGrid users. If you need a larger allocation, see About applying for a Research allocation on the TeraGrid.

Also, before you start, have available a current copy of your curriculum vitae (CV) in either Microsoft Word (.doc), HTML, PDF, or PostScript format.

To apply for a TeraGrid allocation:

1. Log into the Partnerships Online Preposal System. On the left, under "Login", click User, then enter your username and password, and click OK.
Human Centered Support

The Empowering People Strategic Plan, Action Item 27 states: "IU should continue to pioneer and provision effective means of user support through advanced tools for self-service and connection to IU experts to help faculty, staff, and students effectively use IT. IU should continue its work as a support infrastructure provider for national research projects and services."
Human Centered Support

Action Item 27 has four sub-items, one of which is to develop a Knowledge Management System (KMS) that uses IU's Knowledge Base as a foundation and adds collaboration features to enable other institutions of higher education to share code and content.

The Kuali Foundation open-source software model and educational community license was chosen.
Goals for Users of KMS

• **Search** for information quickly and effectively.

*Rich metadata will surround content components.*
Goals for Users of KMS

- **Understand** information's relevance and authority.

*The system will inform the level of confidence searchers can have in pieces of information (e.g., whether vetted or user contributed), allowing determination of what is credible.*
Goals for Users of KMS

- **Contribute** content, ranging from text to rich media, 24/7.

  A seamless, intuitive, porous interface will have the ability to leverage other available resources.