ABSTRACT

Working in a University Setting: Performing an Internship with Miami University’s Information Technology (IT) Services

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This report describes my internship with Miami University’s Information Technology (IT) Services, Oxford, OH. This report is divided into four chapters. Chapter 1 describes the organizational structure of IT Services and my position as a Learning and Information Specialist within the organization. As a member of Learning and Information Services within IT Services Support Services, I managed the Miami University Knowledge Base (KB), the university community’s online source for help on technology-related topics. Further, I also participated in software documentation and user training projects. Chapter 2 describes my activities during the internship. Chapter 3 describes my major internship project, the KB Contributors Online Tutorial. Finally, chapter 4 reflects on my experiences during the internship, including a comparison of my experiences in two different kinds of organizations as well as in an academic and a corporate setting.
WORKING IN A UNIVERSITY SETTING:
PERFORMING AN INTERNSHIP
WITH
MIAMI UNIVERSITY’S INFORMATION TECHNOLOGY (IT) SERVICES

An Internship Report

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Chapter 1: An Introduction to Miami University Information Technology (IT) Services

As part of the requirements for my Master of Scientific and Technical Communication (M.T.S.C.) degree, I completed a 14-week internship at Miami University Information Technology (IT) Services. My internship period from May 3, 2004, to August 6, 2004, was a 14-week segment of my full-time position as a Learning and Information Specialist (Knowledge Base Coordinator). In this position, I was responsible for the Miami University Knowledge Base (KB) (http://kb.muohio.edu), the online resource for questions about technology and services at Miami.

I was hired as the KB Coordinator in February 2004, after two rounds of interviews. I was very happy to start working at Miami University, the place that had offered me the opportunity to return to academia and pursue a long-desired master’s degree.

During my time at Miami, as a Learning and Information Specialist, I was a member of the Learning and Information Services (LIS) group of the IT Services Support Services and Campus Partnerships (SSCP) unit, which was one of six IT Services units. In 2003, IT Services became a division of Miami University, with the hiring of its own Vice President. Since then, the division had gone through an intensive reorganization and realignment of goals and strategic plans. In the rest of this chapter, I present the organizational structure of the division as it was during my internship. Further, I discuss the division’s strategic planning and how it impacted each IT Services staff member, and aligned my position, as a member of LIS, within the overall structure.

As a new division, IT Services had a recently formed, fairly complex organizational structure (Appendix A). During my internship, there was an intensive search for senior members of the organization. By June 2004, three Senior Directors and an Information Security Officer had been hired to
complete the formation of a senior leadership team. The Vice President and the members of his Leadership Team adopted the following mission statement.

The mission of Information Technology Services is to provide centralized leadership for the continued development and support of an environment that is conducive to the application of technology in administration, teaching, research, and learning. Fundamental to this mission is the provision of a stable operating environment including a network and hardware infrastructure and a diverse set of support services. Programs and services must be in line with the needs of a diverse and progressive faculty and student population. To accomplish this mission, the organization works in partnership with our university clients and other service providers.1

In order to accomplish this mission, IT Services, then and now, comprises five areas or units, each with a mission specific to its function, yet complimentary to the overall mission of IT Services. The following snapshot of the five units was outlined in more detail on the IT Services web site.2

The Academic Technology Services (ATS) area supports the teaching/learning process by providing materials, equipment, and services as required by instructional programs, research, and administration.

The Business and Administrative Services area of IT Services supports the IT Services Vice President, Senior Directors and staff in daily operational activities related to budget, payroll, human resources, business operations, and financial affairs. The unit also acts as a liaison between IT Services and the University budget, human resources and payroll administrative areas.

The Computing & Communication Services (CCS) area plans, prepares, installs, configures, monitors, and maintains hardware and software

1 Accessed from the IT Services Web Site in November 2004
2 Adapted from the IT Services Web Site accessed in November 2004
infrastructure; keeps current with the technology to evaluate and recommend strategies for growth; and provides support to other areas of IT Services and, through these areas, to the rest of the university community.

The **Information Systems Services** (ISS) area supports institutional requirements for computing applications, both purchased products and original development. The scope of the mission includes instructional, research, and administrative applications.

The **Support Services and Campus Partnerships** (SSCP) area provides and coordinates technology support to Miami’s students, faculty and staff, with responsibility for client advocacy, quality of service, problem resolution, and continual improvement of strategic processes.

In addition to the above five units, the **Information Security Office** (ISO) provides a much needed resource to the university community regarding data and network security. The ISO provides services, such as drafting security policies and educating the university community about data security though tutorials and classes that ensure computing and network security of Miami’s existing and new systems. Among other security-related events, the ISO provides awareness courses to members of the university community. Please refer to Appendix A for a detailed organizational chart of the Support Services and Campus Partnership area of IT Services (March 2006).

The IT Services Strategic Plan (see Appendix B) was developed to enable IT Services to fulfill its mission. Central to the IT Services mission was the fundamental objective of providing a stable operating network and hardware infrastructure and a wide array of IT support services. The plan was a document that defines the role and goals of information technology as a success factor in moving Miami University into the new century’s global community.

The Strategic Plan was developed at the end of a detailed process that involved analysis of information technology at all the campuses of the university as well as study of information technology plans and tactical goals of peer institutions. The details of the Strategic Plan and tactical goals can be found in *The IT Services*
Annual Report 2004, which can be accessed at the IT Services Strategic Planning webpage at http://www.units.muohio.edu/mcs/ITStrategicPlan/index.shtml.

**IT Services Strategic Goals**
The six strategic goals set forth in the plan are listed below:

Goal 1: Empower and enhance learning and research

Goal 2: Build and expand reliable, robust, and secure access to information and technology

Goal 3: Promote customer-centered information technology services and support

Goal 4: Ensure continuous innovation

Goal 5: Support university administration and management

Goal 6: Plan and manage information technology

**Alignment of IT Services Goals with Individual Goals**
The six strategic goals and ensuing tactical plans impacted each IT Services’ staff member. The individual goals of each staff member needed to align with their unit’s goals which, in turn, align with the overall goals of the division. I found this goal-alignment method very helpful in visualizing the direct impact of my work on the overall goals of the division. For example, my work on the KB directly aligned to Strategic Goal 3, “Promote customer-centered information technology services and support” by enabling users to effectively use the self-help site to access and solve their own technology problems before the users sought external help.

The structure and goals of the division provided the context for my position and my place in the overall structure. I was a member of the Learning and Information Services (LIS) team in the Support Services area of the Support Services and Campus Partnerships (SSCP) unit. During my internship, the unit was called Support Services. Campus Partnerships was a later addition to the unit concluded after my internship period. In this report, I present the unit as
Support Services. At the time, Support Services included IT Services' front-door services which provided direct support to the university community in areas such as technology support, training resources, learning materials (web and print), and consulting on desktop technologies. Some of the more recognizable services were the Support Desk, Knowledge Base, and web-based training modules, including SkillPort and VTC (VTC, Virtual Training Company, as well as Skillport are vendors who provide e-learning courses.) The unit's vision was to provide outstanding support to clients, to manage problems proactively, and to continuously improve support processes.

The following section of the IT Services organizational chart depicts the Support Services structure as it was in August 2004 and helps to ground my position in the hierarchy during my internship (Figure 1.1).

Figure 1.1: Support Services hierarchy, August 2004
The Learning and Information Services (LIS) group provides training, documentation and communication services that promote and support the use of information technology at Miami. Specifically, LIS develops the following in support of centrally managed software and systems:

- Informational presentations and publications
- Web-based and instructor-led training classes
- Print and web-based documentation

At the time of my internship, and later, while I was a LIS member, LIS was a five-member team of technical communicators, led by our manager, Leslie Smith, who also served as my writing mentor during the internship. With over 14 years’ experience in technical communication related to information technology, Leslie’s management style was a creative mixture of involvement and independence. She had an open door policy, so we could always seek her input on a problem; in fact, when I went to her for input, she enthusiastically joined me in tackling the situation. Yet, she encouraged independent problem solving, delegated projects, and welcomed comments and suggestions from the team.

The following chart depicts the primary responsibilities of members of the LIS team, Joyce Buttery, Randy Hollowell, Sue Sargent, and me. These people are still in these positions, although their responsibilities may have changed.

<table>
<thead>
<tr>
<th>Joyce</th>
<th>IT Services website and general web support</th>
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<td></td>
<td>With over 26 years of experience at Miami, of which more than 20 years have been spent in IT Services, Joyce was the primary point of contact for the architecture and site-structure as well as for generating and maintaining the IT Services website. Her other responsibilities included training members of the university community on web development topics and tools such as DreamWeaver and Contribute.</td>
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Randy  Training support and communications outreach

Randy joined IT Services in September 2003. A MTSC alum with over 10 years in technical communication, Randy worked with web-based training modules, Skillport and VTC that were available to faculty, staff and students. He administered the Student Service Provider (SSP) program, provided instructor-led training sessions, and participated in the many IT Services outreach activities such as the Workplace Orientation and Welcome presentation and freshmen and new faculty orientations.

Sue  Training support with emphasis on TRAIN registration system

Sue has worked over 25 years at Miami. She was responsible for administering the online training site, TRAIN. She delivered stand-up training for Banner Navigation, and the web-based training programs SkillPort and VTC. Further, Sue participated in many IT Services outreach activities such as the Admission Open Houses for prospective students, Freshman Orientation for incoming freshmen, and the Workplace Orientation and Welcome (WOW) for new employees.

Shanti  Knowledge Base

My primary role as the KB Coordinator was to manage the MU Knowledge Base, the online self-help tool for technology questions. My tasks included identifying and generating KB content, editing others’ submissions, maintaining the KB database, and training KB contributors.

In addition to the above primary tasks, each LIS member spent considerable time on documentation projects as the need arose. These documentation
projects included web-based and print materials, training materials, announcements, online tutorials, and any project-appropriate documentation output. We also participated in many IT Services marketing and outreach efforts to educate the university community about issues related to technology.

Therefore, in our primary roles, we did not have a lot of opportunities for collaboration. However, we collaborated and worked together on many of the documentation projects for IT Services. Often, we served as team editors and provided input on each other’s work.

**My Mentor**

Leslie Smith, the LIS manager, served as my mentor during the internship. She was also my reporting manager. During my internship, I had weekly meetings with her to go over my progress. Apart from these formal progress meetings, we also met daily whenever I needed her guidance with my duties.

Additionally, Leslie was the KB Coordinator before she accepted the position of manager of LIS. In fact, I filled the vacancy created when she changed positions. Therefore, I interacted with Leslie very frequently while I was learning about my job.

**Chapter Conclusion**

In the rest of this report, I present the details of my internship. I discuss my assigned tasks during the internship, major projects I worked on, and the lessons I learned. In the concluding chapter of this report, I discuss some insights I gained during the process and how they set the tone for my continued career at Miami, and beyond.
Chapter 2: Internship Projects

Since I decided to start my internship after I felt comfortable in my position, my internship began three months after I started in my position. Because it was a long-term, fulltime position and I knew that I would need some time to learn my responsibilities, I felt that it would be wise to delay my internship period so that I would be able to apply more of the MTSC curriculum to my internship projects than during my training period. In this chapter, I first provide a snapshot of my activities prior to the start of my internship. Then I lead into a detailed account of my internship activities.

I spent my initial weeks learning about the Knowledge Base, its technical aspects, its content, and about the administrative reports it generates. Further, I met the different groups I would be working with, including the largest contributor groups of the IT Support Desk and Advanced Desktop Support. I began attending bi-weekly meetings with these front-end customer support groups so that I could become familiar with their ongoing projects and issues. Many of the topics discussed in the meetings were addressed through creating or updating KB cases (articles). I also spent time acclimating myself to my group and to the work culture in academia.

In the weeks following my start, LIS was involved in organizing the Ohio Higher Education Computing Conference (OHECC). So, I jumped right into the preparations offering documentation, and other assistance, as needed. This conference afforded me the chance to make some friends and assimilate myself into the group. It also gave me insight into my strength as a team player who could “jump in and run with it” without the need for much direction. These valuable lessons helped me to perform my duties during and after my internship.
Internship activities

My position as the KB Coordinator accounted for a major portion of my internship work time. My tasks included technical writing and editing, marketing the KB, and some administrative functions. Apart from the KB, I worked simultaneously on other documentation projects to which I contributed content, provided design and content feedback to team members, and compiled technical material into reports.

The following chart (Figure 2.1) shows my time spent on each task.

![Pie chart showing time distribution](chart.png)

**Figure 2.1: Time spent on internship projects**

During my internship, I devoted a significant chunk of time to my KB activities. Further, I worked on several smaller documentation projects that did not take up as much time overall but were interspersed throughout the internship period. In the rest of this chapter, I describe these documentation projects and my KB-related tasks.

LIS Projects

During my internship, I worked on several documentation projects charged to LIS. Some of the following projects were team efforts, and I contributed to some aspect of them, such as editing. Other projects belonged to me, and I was solely responsible for them.
Kronos Student Supervisor Instructions
The LIS team worked with many university departments to create training materials on software and other technology. For example, the Miami University Payroll Services needed materials to train student employees and supervisors to use the payroll system, Kronos. Student employees clock in and out of their shifts using the Kronos payroll system. Collaborating closely with Payroll Services, the LIS team worked on developing a series of instructions for student employees and student supervisors. This series included several pieces, such as instructions on clocking in and out using Kronos’ online interface, display cards with instructions on using card-swipes, approving student timecards, and generating payroll reports.

Prior to my internship, a LIS colleague had been working on the student employee documentation. I inherited this project shortly after I joined the group. Continuing the series, I finalized a guide that provides instructions for student supervisors on using the Kronos system to approve timecards and maintain their student employees’ payroll information. I started the project with working drafts of an instruction manual and a quick reference guide that had gone through a round of approval. To finish out the project, I completed the following tasks:

- Learned the Kronos system.
- Revised instructions and forwarded them to Payroll Services for approval.
- Made suggested changes—inserted screen prints and created associated instructions.
- Went through two more rounds of revisions due to administrative changes in Payroll Services (including a departmental name change from Payroll Office to Payroll Services).
- Conducted a meeting with the Payroll Services manager and finalized the documentation phase of the project.
- Coordinated document production, including printing.
• Identified potential future documentation/training materials, including the scope for an online tutorial.

This project afforded me the opportunity to work with a client outside of IT Services, thereby validating the importance of acquiring knowledge about a project from a subject matter expert (SME). My SME was an employee of Payroll Services, who used the system, trained other employees to use the system, and performed administrative functions within it. Further, this project also taught me the importance of a good project hand-off. The final meeting with the Payroll Services manager helped me to let my client know that we needed to finalize the content with the final version and make printing decisions. It marked a clear ending to revisions and thereby ended the project.

The training materials were well received by both Payroll Services personnel and the student supervisor. I continued to work with Payroll Services beyond my internship and made several updates to the existing materials; I also created online tutorials on related topics. Payroll Services continues to use these materials to train new employees.

**Online Technology Guide**

The online technology guide ([www.miami.muohio.edu/technologyguide](http://www.miami.muohio.edu/technologyguide)) is a website that provides information to potential students and their parents about the use of technology at Miami University. The technology guide is Miami’s response to a questionnaire by EDUCAUSE, initially titled “The EDUCAUSE Consumer Guide for High School Students and Parents.” EDUCAUSE provides an introduction as well as links to many responses to the questionnaire from
The following quote was adapted from the EDUCAUSE website:

EDUCAUSE, a non-profit institution focused on transforming higher education through information technologies, developed the Consumer Guide in cooperation with the National Association for College Admission Counseling (NACAC) and the American Association of Collegiate Registrars and Admissions Officers (AACRAO).³

The guide is designed to help high school students and their parents ask the right questions to assess how universities are leveraging technology to meet their students’ educational and social needs.

Miami’s online technology guide goes through a yearly review and update process. My project was to coordinate this process in 2004. The following is a list of the tasks I completed for the project:

- Distributed sections of the online guide to content owners across the university.
- Coordinated and edited their responses.
- Completed an updated version of the guide with revision marks.
- Sent the updated version to University Communications for web site updates.

The online technology guide project was an excellent opportunity for me to gather first-hand information about the use of technology across Miami. Further, I gained experience in working with a number of authors who each provided answers to a part of the questionnaire, which I then combined into one

³ Adapted from [http://www.educause.edu/studentguide](http://www.educause.edu/studentguide) accessed November 2004
document. I was grateful for the experience I had with creating a master
document for ENG 692, where I coordinated each classmate’s section of the
white paper we were producing as a class and combined it into its final format.

The next review of the online technology guide was scheduled for May 2005.
However, after my internship period, in late fall of 2004, EDUCAUSE released a
new questionnaire, which prompted a complete re-write of the Online
Technology Guide that I subsequently completed in 2005.

IT Services Support Services Client Satisfaction Survey Report
Every Spring, the IT Services Support Services (LIS falls under this section of IT
Services) distributes a client satisfaction survey to a cross section of faculty, staff
and students. This survey rates their satisfaction with the front-line support
services, such as the phone-in Support Desk (513-529-7900), the Knowledge
Base (http://kb.muohio.edu), and the online training modules available through
SkillPort and VTC (www.muohio.edu/training). Support Services uses the
feedback received from the survey in service planning and refining efforts.

In 2004, the survey was sent to a random sample of 1800 students, staff, and
faculty, of which 235 responded. I started working on the project after the 2004
survey responses came in, and an LIS team member entered the data in the
system. Another IT Services colleague had already analyzed the data and
provided the statistical information to LIS.

My task was to study the data, compare it with the results from 2003, and create
a report to be presented to the Vice President. The report would include facts
such as increase/decrease in the usage of our services, comparison with prior
years shown in bar charts, and samples of comments from the survey
respondents.

The following list summarizes my tasks for this project:

• Studied survey results data.

• Created a report detailing the following information:
• 2004 survey results

• Comparison of 2004 results with 2003

• Pictorial representation of the data (bar charts).

• Sent report for management review.

• Finalized report and delivered it to the Assistant Director of Support Services.

This project offered me the opportunity to learn about user perception of the IT support services, including the KB. I was very interested to read some of the comments from faculty, staff, and students, both positive comments and those highlighting opportunities for improvement. An eye-opener was the astonishing fact of how many people are not aware of the Support Desk or the KB. Out of the 235 respondents, over 20% indicated that they were not aware of the KB. However, of the people who knew about the services, a large percentage used them (almost 90% of the respondents indicated that they would use the KB first to solve their technological problems).

Since this report was part of internal departmental work, I received constant feedback from Leslie about the format and presentation of the survey results. I got approval on the final draft from both Leslie and the Assistant Director before I finished the project. See Appendix E for a copy of the report.

MUnet/ResNet Guide

From 1995 to 2004, the MUnet and the ResNet guides were produced and released each year to help the university community familiarize themselves with Miami’s technology environment. The ResNet guide focuses on students living in the residence halls, whereas the MUnet guide focuses on the rest of the university community, including off-campus students, faculty, and staff.

For this project in 2004, a team comprised of members from many IT Services units worked on the different sections of the manuals, such as computers, data security, telecommunications, and troubleshooting common problems with
technology. The LIS team coordinated the sections for a consistent look, ensured proper content organization, and handled production and distribution.

My role in the project was to edit the document for organization, clarity, and grammatical errors. Then, to end the project, as a group, the LIS team collaborated on the edits, took requests for clarification to the content owners, and prepared the documents for production. Once the guides were printed, they were distributed among the residence hall occupants, graduate students, staff, and faculty members.

The next review of the guides was scheduled for after my internship period. In Spring 2005, based on feedback from the prior years and an analysis of the emerging technologies, the MUnet team decided to shift focus to a more electronic medium and created a CD instead of the paper guides.

**IT Services Website Redesign Project**

When my internship was more than half way through, I was selected to be on the core team of the IT Services Website Redesign project, which was a new project resulting from the new strategic plan. One of the strategic goals, as described in Appendix B, is to “provide customer-centered information technology services and support.” An ensuing tactical project that evolved out of this strategic goal was to redesign the content-intensive IT Services website to make it more user-friendly.

During my internship, the project got the “go-ahead” for a full redesign. However, business decisions forced us to divide the project into two phases. In phase one, we were charged with creating a “new face” for the website—including a new home page with cleaner organization. We were also asked to make only minimal changes in the subsequent web pages. In phase two, which was scheduled to begin after my internship, the project was planned to start on a more comprehensive design which would allow the project team to overhaul the existing pages and reorganize and update the content.

After the project’s initial kick-off meeting, I participated in a focus group to identify the scope of the project. My role in it related predominantly to the KB,
updating existing information, identifying content that was on the curren website but should be housed in the KB, and coordinating with authors to create new content that might go in the KB.

Once the scope was defined, the core team started with Phase I of the project, which was to create a new home page. To that end, we analyzed the current home page, categorized all the information into groups, and brainstormed on ideas for a new design.

Following my internship period, we continued with Phase I and implemented the new home page in March 2005. We got a favorable response to the new design from both within and outside of IT Services. Work did not begin on Phase II as of May 2006, when I left Miami, as there were other dependencies such as the impending release of a new university-wide web page template that affected the direction of this project. Working on the IT Services website redesign project afforded me the opportunity to work with people from other units of IT Services, predominantly, the Web Design group.

Office of Telecommunications Website Integration
The Office of Telecommunications merged with IT Services in the summer of 2004. Consequently, the Telecommunications website (www.muohio.edu/telecommunications) was integrated into the IT Services site. Joyce and I were charged with integrating the information on the Telecommunications website with the IT Services site. We collaborated during the project and identified the content that would move to the IT Services website and the content that would be added to the KB. We discussed the “rule of thumb” we would use to determine where the appropriate content would be housed. We decided that all product information should be included in the website and all how-to instructions in the KB. My role in this project included the following tasks:

- Analyzed the Telecommunications site to identify potential KB content
- Collaborated with the IT Services webmaster to mark content for the site
and for KB

- Updated the KB
- Sent updated content for approval

This project was part of the larger IT Services Website Redesign project. During the project, Joyce and I worked closely with the staff members in the Office of Telecommunications and got approval of our ideas from them. After the initial integration, I continued to work with the Office of Telecommunications to update related KB cases; I continued to do these updates, even beyond my internship period, until I left my job at Miami University.

Along with the projects I have described, I performed the tasks related to my primary responsibility, the KB. As depicted in the chart in the beginning of this chapter, I spent the majority of my time with KB-related activities, which I describe below.

**KB Activities**

The Miami Knowledge Base (KB) can be accessed at [http://kb.muohio.edu](http://kb.muohio.edu). The KB is Miami University’s online self-help resource for students, staff, and faculty. Even now, in 2007, the vast majority of the information covers technology-related topics. For example, the KB contains information on logging into myMiami, accessing various Miami services, obtaining wireless internet access across campus, protecting computers from virus attacks and many such relevant topics. The KB also contains some information on non-technology topics such as university parking, and Miami calendars.

At the time of my internship and later, and even now, information in the KB is authored by the KB contributors. Much of the technical content is authored by IT Services employees. However, the KB also contains information from many other university offices, such as the Registrar’s office and the Bursar’s office. The KB team welcomes content from any member of the university community who has information that should be made available to a wide university audience. This content could be both instructional and/or informational. For example, Parking Services has contributed informational content about their services. The Bursar’s
office has contributed instructional content regarding student payment account information for students and their parents.

Each article (or topic write-up) is called a case. All information in the KB was arranged in cases. Although the end user may not pay much attention to terminology used in the KB, the contributors must understand these terms so that they follow contributing guidelines correctly.

KB Administration
During my internship, and after, I spent a considerable amount of time on the tasks related to KB administration, listed below. These tasks are all equally important to ensuring that the KB was current and accurate.

Created new content (cases) for the KB by coordinating with various content owners. This process involved identifying potential content, contacting subject matter experts who would become the content owners, and creating content collaboratively. Within IT Services, the content owners usually contacted me about new content in their areas that could be put in the KB. This content might have been the result of a new policy (for example, email policy or peer-to-peer file sharing) or a new procedure (for example, setting a secret question and answer pair for a MUnet password). Outside IT Services, to generate content from other university areas, I contacted someone in the appropriate departments, talked to them about the advantages of adding to the KB, and determined a process for content creation. Usually, authors entered content through a web-based authoring interface. The cases, then, went through a workflow and approval process before they were published and made available to the university community. Some authors preferred to send me a Word document, and I entered the information into the KB.

Edited content created by various contributors. The KB contains cases covering a diverse array of topics. Contributors, who author these cases, are Miami employees from different departments and divisions. When a contributor creates a case, it enters workflow, where it waits for editorial review. I reviewed cases in Editorial Review, edited for grammar and style, and tested the
instructions where possible (sometimes, the instructions covered an application to which I did not have access). Sometimes, I needed to return a case to the contributor with questions or suggestions. Once a case was determined to be correct, I published it, and it became available for viewing.

**Ensured that the KB content was updated regularly.** Updated content was and is vital for users who wish to find the most accurate and timely information. To ensure that the KB contained current information, I ran a bi-monthly report that displayed the KB cases that had not been reviewed in the past year. I sent these cases in a spreadsheet to the respective content owners. The owners reviewed the cases, made modifications, and if necessary, sent them back to me for an editorial check. Additionally, I ran monthly data-integrity reports that displayed the data exceptions in the KB, such as broken links, incorrect links and orphan cases. I corrected the exceptions.

**Created and maintained training materials for KB Contributors.** The KB content owners and authors used a web-based authoring tool to enter KB cases. During my time as the KB Coordinator, the Contributor training packet contained handouts that included instructions on entering, updating, and approving content using the web interface, as well as definitions of KB terminology, style guidelines, and basic HTML. I used these handouts when I conducted one-on-one or group training sessions with new contributors.

**KB Contributors’ Online Tutorial**

The KB Contributors’ Online Tutorial was one of my major projects for the internship. Originally, I had planned to complete the tutorial during my internship period. However, as other, more pressing projects started appearing on LIS’s project list, I had to set this project aside. Although I spent a major portion of my internship time on the tutorial, it remained partially completed. I had hoped to complete it in the future, as time permitted. However, in the time following my internship, business needs changed and the KB team began researching other KB software options. With the purchase of a new KB software package, the interface would change, thereby necessitating major changes in the
tutorial. However, at the time of my departure from Miami, the search for a new KB software package was still in progress. Consequently, I was directed to shelve the KB Tutorial.

The online tutorial that I had begun creating was designed to cover topics on contributing content through the online KB authoring tool. The tutorial was designed to walk new authors through the steps required to enter cases, attach documents to cases, link cases to other cases and problem statements, and modify content. I discuss this project in detail in Chapter 3.

This chapter provided a detailed view of my work during my internship, with an overview of my duties as the KB Coordinator, and specifically discussed the other projects I completed during my internship. The next chapter details one of my major projects, the Knowledge Base Authoring Tool online tutorial.
Chapter 3: The Knowledge Base Authoring Tool Online Tutorial

In this chapter, I discuss my major project for the internship period. While Leslie and I discussed my internship and brainstormed for ideas for a project wherein I could apply much of my M.T.S.C. education, we decided that although much of my day-to-day activities involved KB activities (detailed in Chapter 2), we wanted to decide on a project that would afford me greater scope for technical documentation. We decided on creating an online tutorial that would be used as a self-training tool by new KB contributors. The KB tutorial project would enable me to use documentation as well as design methodologies, conduct user testing, and provide an overall well-rounded training product. In the remainder of this chapter, I discuss the KB online tutorial project in detail. I follow it with an analysis of how I applied Paul Anderson’s Problem Solving model to my internship project.

Identifying the project

One of my responsibilities as the KB Coordinator was to conduct training for the people who wished to contribute content to the KB. The KB content owners and authors used a web-based authoring tool for this process. Apart from KB terminology, style guidelines and basic HTML, an important aspect of the Contributor training was to teach the contributors how to enter cases, update, and approve cases using the web interface. I used handouts covering these topics when I conducted one-on-one or group training sessions with new contributors.

In addition to the instructor-led sessions, we (Leslie and I) identified the need for another training tool that would enable users to learn the authoring process on their own. A self-paced tutorial with some interactivity would allow them to learn at their own pace and would also be available to them all the time. Further, an online tool would also help contributors on other campuses who might not be able to schedule a timely session.
Since the content in the KB included a variety of topics, both technical and non-technical, the contributors also had a very wide array of backgrounds. About 80% of the content was generated within IT Services; however, even then we had many contributors from other departments in the university.

I identified the major groups of contributors and placed their degree of technical expertise in a range of ‘novice’ to ‘advanced’. This categorization helped me to design a tutorial that would not be too technical. Further, it also helped me identify the more probable categories of users who would actually use the tutorial. For example, some advanced users might not need to undertake the entire tutorial because they would be familiar with wizard-driven applications. They might just be interested in KB concepts or style guidelines. Some of the categories of KB contributors and their technical expertise levels are shown in the table below:

<table>
<thead>
<tr>
<th>Audience Type</th>
<th>Technical Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Services Support Desk Analysts/Advanced Desktop</td>
<td>Advanced</td>
</tr>
<tr>
<td>IT Services Administrative Systems Support</td>
<td>Intermediate to Advanced</td>
</tr>
<tr>
<td>IT Services Learning and Information Services</td>
<td>Intermediate to Advanced</td>
</tr>
<tr>
<td>Other IT Services personnel including Systems</td>
<td>Advanced</td>
</tr>
<tr>
<td>Analysts, Programmers, etc.</td>
<td></td>
</tr>
<tr>
<td>Other departments, such as, Bursar, Libraries,</td>
<td>Novice to Intermediate with some Advanced</td>
</tr>
<tr>
<td>Parking, and CPPO</td>
<td></td>
</tr>
</tbody>
</table>
Designing the solution

Setting objectives
As I was learning about the audience, I began to think about the design of the tutorial. My objectives for the tutorial covered the important aspects of ease of use and aesthetics.

- The tutorial had to be easy to use. Since my audience was so diverse, I wanted the tutorial to be modular to enable users to pick and choose the parts they wanted to access. Further, I envisioned take-away reference materials that the users could print and use later.

- The tutorial had to have an aesthetically pleasing design with easy navigation functionality.

After I set my objectives, I created a task list which included gathering material and creating tutorial content, working on the tutorial design, and testing and implementing the tutorial as part of Contributor training.

Gathering material
I started by reviewing the existing training materials. The existing handouts were well written and would provide the basis for my tutorial. These handouts covered the main topics that I wanted to cover in the tutorial, such as the KB contribution and review process, KB terminology, adding and reviewing cases, style guides, and basic HTML information. Since one of our future KB goals was to make the KB compliant to Section 508, I also researched relevant material on the Internet to educate myself about the criteria to make compliant web-based materials. I then created a topic list to be covered in the tutorial. See Appendix C for the outline of topics.

Creating content
Using my research of Section 508, I updated the existing content, especially the HTML guide. According to the guidelines laid in Section 508, information technology should be designed to be accessible to people with disabilities. One of the ways to ensure that the accessibility is to use Section 508 compliant HTML, which does not interfere with reader software that a visually impaired
person might use to access web pages. And since our future goal was to make the KB Section 508-compliant, I wanted to train the contributors to use compliant basic HTML, such as, `<strong>` for bold text (instead of `<b>`) and `<em>` for italicized text (instead of `<i>`). In addition to the HTML guide, I also reviewed and updated all the existing materials. This exercise enabled me to become more familiar with the KB style guides as well.

**Creating the tutorial design**

Designing the tutorial afforded me the greatest opportunity to learn about the software that we would use. Joyce, the web ‘expert’ of the LIS group, collaborated with me on this aspect. After experimenting with different ideas and software, we decided on a website design with a tree-like (expanding and collapsing) menu navigation and embedded demonstration movies. I liked the design that we chose because its appearance was familiar to users, since it looked just like a website. Further, we decided to use several different software applications to put the tutorial together, which really piqued my interest.

To meet the objectives I set for the project, we made the following aesthetic and functional design decisions.

**Aesthetic design decisions:** These aesthetic decisions were influenced by my objective of keeping the look and feel of the tutorial similar to a web page format so that users would be familiar with it.

The tutorial design would use the then existing Miami web page template with the navigation bar to the left, the MU logo in the banner to the top, and the general color scheme common to all Miami web pages. This design would enable us to be in compliance with the university design and provide a cohesive look with other Miami web pages.

In addition, we would add our own color scheme of the IT Services gold and MU red.

In addition to the Miami University logo on the existing template, we would also use the Knowledge Base logo.
**Functional design decisions:** The following functional decisions enabled me to meet my objective of making the tutorial modular so that users would be able to pick the modules they wanted to learn. These decisions also enabled me to maintain a simple and easy-to-use format.

Navigation menu— the tree-like left navigation menu would expand and collapse to show more or less detail in the menu. We used Project Seven’s Test Tree Magic software to build the navigation bar. The following link provides more information about the software.

(http://www.projectseven.com/products/menusystems/tmm/index.htm)

Content Area—the main content area would display the corresponding content when the user clicked on an item in the navigation bar. We used Microsoft Word and Macromedia DreamWeaver to add the content modules.

Demonstration movies—Along with the content, the user would be able to view short movie clips demonstrating the topic. We used RoboDemo (now Macromedia Captivate) to create the movies.

Handouts—One of the menu items, Handouts, would expand to allow the user to open PDF documents that the user could print and use later.
Figure 3.1 below shows the design with the menu collapsed.

Figure 3.1: Project design with menu collapsed
Figure 3.2 below shows the design with part of the menu expanded.
Creating the tutorial

Once I finalized the design decisions and was clear about the direction I was going to take, I began work on creating the tutorial. The tutorial had several elements—the individual files for the content areas, the demonstration movies, links between the files and with the navigation area, and printable files for handouts.

**Content files:** When Joyce and I created the prototype of the tutorial, she created the templates that we would be working with. I had already created individual Word files for the content segments. My next step was to create individual html files using the template. These files would be linked to the main navigation area as well as to each other in sequential order.

**RoboDemo movies:** Knowing that the movies would take the most time out of all the tutorial items, I worked on the other areas first. I had intended to create and revise the movies after the other pieces were done. However, since the tutorial was incomplete due to other assignments that were more urgent, I could not complete the movies. Subsequent new developments indicated that we might change the KB software that we then used. The new software might look and feel significantly different from the current software, which means that the entire tutorial might have to be redone.

**Links between files:** We decided that each content area would be linked to the one that appears next in the navigation area. When a user clicked on “Next Topic” in the main content area of the screen, the link would take the user to the next logical topic, which would be the same as the order in the navigation.

**Handouts:** I created PDF documents of the handouts for users to print and keep as reference materials. These files would be linked from the navigation area.

Although the KB tutorial was my major project during the internship, it was not my only project. I was working on several documentation projects as well as my regular KB maintenance activities. Other business demands and priorities took precedence over the tutorial and so it remained unfinished, even when I left Miami in 2006. After my internship, I continued conducting training for
potential KB contributors on a one-on-one basis. I used the printed handouts and demonstrated the system to the users. If I had been able to complete the tutorial, my plan of action would have been to complete the movies and finalize all the linking between the files. After some user testing and resulting revisions, I believe I would have had a useful self-learning tool for my audience. However, if the KB team decides to change the software, the interface and the look of the KB will also change; some of the functionality might change as well. In that case, the tutorial will be a new project.

This project afforded the opportunity to not only strengthen my growing knowledge of the way the KB worked but also helped me apply documentation design principles. Further, I worked with several different kinds of software and learned about bringing them together into one product. The most important lesson I learned from this project was that my work is not always in my control. Business decisions forced me to sometimes abandon a project on which I had spent considerable time when the need of the hour changed. However, the work I did was never wasted because I still gained in experience!

In the KB Online Tutorial project, I based my activities loosely on Paul Anderson’s Problem Solving model. In his model, he defines five phases for developing technical communication:

Define problem—Define the problem, set objectives, analyze the context and audience

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Design solution—make initial design and format decisions, gather information, prepare a draft
Test solution—design test/review procedures, test/review, gather and analyze responses
Implement solution—revise draft, produce, package and deliver the product
Evaluate solution—design and use evaluation method, analyze the results

During my internship, I used the first two phases to develop the tutorial project. In the first phase, Define Problem, I analyzed the situation, context, audience, and the need for a tutorial. The model recommends direct interaction with the audience during audience analysis. Although I did not gather my information about my audience members by directly interacting with them, I believe I got an accurate analysis based on input from my mentor (who had worked with my audience for three years), and by interaction with current contributors. I then set objectives for the tutorial, which focused on ease-of-use and a pleasing design which would invite the users to learn about contributing to the KB.

During the second phase, Design Solution, I gathered material, created additional material, worked on the design of the tutorial, made design prototypes, and decided on the layout and design elements. This phase was the longest, was quite detailed, and took much of the time of my internship period. In this phase, I also started creating the tutorial pieces. Since the tutorial was not completed, I did not use the other phases of the model.

If I were to have completed the tutorial, for the third phase, Test Solution, I would have tested it first within LIS, and then with a few sample users from the current contributor group. Then, in the fourth phase, Implement Solution, I would have started using it as a standard training tool for new contributors. For phase five, Evaluate Solution, based on the feedback I received, I would have made modifications, performed more testing, and implemented the results.

My observation about applying the Anderson heuristic to my projects is that it is a very general model that enabled me to adapt it to any communication project.
In general, it allows for movement within the phases as well. For example, I found myself moving back to the first phase while I was in phase two to adjust the context or to include an audience group that I had not previously included. Alternatively, while working in the first phase, as I learned more about the context and audience, I started defining the design of the project in my mind and on paper. And, as I looked forward, I could see myself going back to the design phase from the testing phase, or from the evaluation phase, which might yield design or content changes.
Chapter 4: Reflections on the internship

In this chapter, I reflect on some observations that occurred during my internship and since then. I start with a brief visit to the way IT Services strategic goals impacted my goals for each quarter. I follow with a general discussion about Gareth Morgan’s six models of organization, and my experiences with two of the models. Next, I discuss the differences I observed in the organizations while working in a university versus working in corporate and move to more specific observations about my activities during my internship and beyond. Finally, I end the chapter with some closing thoughts.

I begin this chapter with a reflection on the IT Services strategic goals, specifically Goal 3. As I elaborated in Chapter 1, the six strategic goals guided all IT Services personnel towards a common goal laid out in the strategic plan. The individual goals of each staff member needed to align with their unit’s goals which, in turn, aligned with the overall goals of the division. Goal 3, which was to “promote customer-centered information technology services and support”, was the one that directly impacted my goals as the KB Coordinator. I found this goal-alignment method very helpful in visualizing the direct impact of my work on the overall goals of the division. IT Services laid a very easy-to-follow and guided system of evaluating the performances of each employee. In my performance evaluation plan, my goals had to effectively point towards Goal 3. And, I had to quantitatively prove that my work was fulfilling the requirements of Goal 3. For example, I showed the number of cases added to the KB each quarter, the number of KB categories that were reorganized, and, the satisfaction percentages from users responding to the Support Services survey, etc. These goals helped show how the KB was being used by the university community and what I was doing to promote its use as well as improve and increase the KB content.
In the article, *Six Models of Organization*, excerpted from *Imaginization: The Art of Creative Management*, Gareth Morgan discusses six models of organizations\(^5\); he analyzes flow of communication and decision making in an organization based on its organizational structure. Morgan conceptualizes the six models designed to “characterize organizational forms suited to different degrees of environmental change.” (Morgan) For example, Model 1 organization has a typical mechanistic hierarchical management style where all the decisions are made at the top. Communication is usually top down. In this type of organization, everyone knows their duties and change is kept to a minimum. However, such an organizational style works only until an organization’s tasks change. When such changes occur, Morgan explains that the organization moves to Model 2 by appointing a top management team to handle the problems, while allowing the functional team below them to deal with day-to-day running of the organization. As he moves through the six models, the focus is on developing cross-functional team empowerment with distributed power shift down the organization. He emphasizes that to achieve the flexible, innovative organization that is needed to deal with the turbulence and constant flux of a modern environment, organizations need to move away from the standard functional organizational structure into a team environment comprised of cross-functional representation. Such powerful, exciting and dynamic teams would draw members from different areas of the organization, be in charge of a project and work through “cross fertilization of ideas, and a regular exchange of information, especially between team leaders and senior management.” (Morgan)

My experience with a Model 3 organization

IT Services fits into Morgan’s ideology of a Model 3 organization. IT Services has a detailed organizational structure similar to a bureaucratic organization, with a senior management team at the top. However, when the organization moved to a “project based organization”, the work was done based on projects. So, there were functional teams as well as project teams that drew members from the functional teams. Teams used Project Management methodologies to define and execute the projects, while reporting the progress of a project to the Project Manager, to their own functional heads, and to the central Project Office that guided all the IT Services projects. Morgan explains a Model 3 organization as one in which project team members have dual loyalties—one to the project and another to their functional organization. Real power over day-to-day activities and career advancement of the members rests with departmental heads, and as such, the project teams end up with little clout.

According to Morgan, Model 3 is effective only “when issues delegated to teams are small in number, require consultation rather than action, and allow generous time-frames” for producing results. (Morgan) I found while working on project teams, that often, team members sat in on project meetings as representatives of their functional group’s point of view. If problems arose in meetings, the team delayed decisions until the members had a chance to report back and discuss the situation with their functional heads. If a problem could not be solved within functional teams, the issue was referred to the top management team so that the functional team could get conclusive direction. Such a structure resulted in delayed projects and frustrations among project managers who typically had to factor in all these subtleties of organizational behavior while planning their projects. However, I think that since the projects in IT Services are planned in advance, and did allow for generous time frames, the project teams were successful in completing their projects.

My experience with a Model 4 organization

Morgan advises that to be effective, organizations should be driven and
enlivened from the middle by flexible, aggressive, innovative teams, such as in a Model 4 organization. Model 4 organizations give equal priority to functional areas and to project teams. The project teams again draw from the functional areas; however, this model differs from Model 3 in that the members now report to the Project Head. So, while they bring the expertise of their functional background, the members are completely focused on the project and a real team commitment develops. The functional departments, in this case, become support groups for the project. Communication between the project team and senior management is again free and frequent.

In my prior work experience in a corporate setting, I have worked for an organization that moved from being a Model 3 to a Model 4 organization. Initially, I was part of a team of curriculum developers and trainers within the functional structure of the organization. I encountered all the Model 3 issues of being “loaned” to projects, working on the projects while still reporting to my functional group, and still working on my day-to-day activities as well. I knew that my annual performance would be decided by my functional superior and so my loyalties were always divided. After a while, I was “loaned” to a new project as the only technical writer on the team. However, in a few weeks, I was “transferred” to the project for its duration. I then reported to the Project Head, focused completely and solely on the new project, and did not have any day-to-day responsibilities to my functional department. As a result of this structure, our project team members were committed to the project, had the power to make decisions, and developed an innovative, aggressive plan to complete the project. Although it is true that in such projects, the deadlines are rigid, work is completed quickly and decisively, and tensions run high, I found such a structure to be more effective in ensuring the success of a project.

In this section, I elaborate on my experiences of working at the university and compare them to my corporate experience. My experience of working for the university has impressed me with the need to be able to write to varied readers. One project might have a completely different audience than the previous one. Further, my projects in the university were usually long term, enabling me to
plan well and deliver a quality product.

**Experiencing a university work culture**

The work culture at a university is much different from my previous work experience in the corporate world. Although there are deadlines in both places, the deadlines in a university appear to be more relaxed. The projects I worked on were longer term and some even recurred annually, enabling me to plan for them in advance. Because the projects had more time to be completed, people worked on multiple projects simultaneously and also seemed to be more relaxed. People used Project Management methodologies to plan their projects and had a formal process of requesting team participation and approvals. IT Services had established a Project Office and all the projects that the division undertook had to go through a formal approval process. This process enabled IT Services staff members to plan the time they would devote to each project.

Another interesting aspect of working in the university was that I found a sense of camaraderie that came more naturally among people who had worked together for years. I benefited from others’ experiences as well since many people had worked in the same department for years and had accumulated a vast amount of tacit knowledge about audiences, systems, and the university as a whole.

In contrast, my experience with corporate projects was much more fraught with tight deadlines, immediate turnarounds, and a sense of urgency all the time. I used to concentrate on predominantly one, all-consuming project at a time. Time was money, and projects were managed by Project Managers who kept everyone on their schedules. I felt that I was more organized then, and lived by my to-do lists.

I also worked with different people on almost each project. People changed positions and even companies frequently which did not allow for many experiences that could be valuable to newer projects. However, there was a sense of immediate gratification for a job well done, or immediate reprimand for a failure. There was also more closure on projects. Once a project ended,
the team disbanded and moved on to other, different, but still all-consuming projects.

**Writing for a university audience**

As I have mentioned previously, the technical knowledge of my audience, for any of the projects I worked on, is impossible to categorize into any one slot. Writing for such a wide audience, which, at Miami University, includes students from all disciplines, faculty, staff, and any other potential users, was quite a challenge. My audience for any given project could have had a wide range of technical expertise. For example, the Student Supervisor’s Guide to Kronos was geared towards supervisors of student employees, some of whom are students themselves, and others, who are staff members. Since I dealt with IT-related subjects that required me to write user instructions, I ensured that I kept my instructions brief, concise, and free of technical jargon. I found that although many of the students were very techno-savvy, just as with other, less techno-savvy users, they responded well when they were given just the information they needed to do their jobs.

In addition to a varied audience, the realization that my work potentially would reach an astounding number of people had a significant impact on me. For example, the Online Technology Guide is still available on the Internet for prospective students, their parents, and even anyone interested in information about technology services in universities. It is linked not only from the Miami website, but also from the EDUCAUSE site, thereby increasing its reach.

In contrast, during my work in a corporate setting, most of my writing was for a smaller audience. I used to write instructions that were available on the company intranet for the 1500 or so employees to access, and some of my work was used to train the company employees on products and policies. I had intimate knowledge of the audience members and knew how they would use the information. In fact, I was available to them in case they had any questions and for follow-up training sessions. Such is not the case with the widely distributed tutorial.
Marketing our services

One common problem/situation I found in both my experience in the corporate world as well as at Miami was the struggle for recognition that technical communicators have to face. In both places, I had the opportunity to work on projects in which the technical communicator was brought in at the end to finish up the documentation started by other project members. So, one of the challenges the LIS team faced was to achieve inclusion of our team on project teams right from the beginning of a project. Although I did not work on any major projects with this situation during my internship, other LIS members did, and we discussed this issue in our team meetings. Leslie spent considerable time lobbying for our inclusion.

However, as part of the new IT Services Strategic Plan, IT Services evolved into a project-oriented organization. We then had a new centralized Project Office that monitored all the IT Services projects. Since the Project Office was established and recommended documentation and training as an important aspect of project planning, LIS was included in many new projects, providing a win-win situation for both the project managers and LIS.

Closing thoughts

My internship offered me hands-on learning experience and a chance to put the theory of my MTSC coursework into practice. Using the Anderson model for problem solving, I worked on my internship project and I have used the model for other projects as well.

Further, my internship was an excellent opportunity to learn new skills, such as software skills that I had not learned during my graduate studies or my prior work experience. During my internship project, I found exposure to Project Seven’s Tree Menu Magic software, as well as RoboDemo (now known as Macromedia Captivate) invaluable. I used my RoboDemo skills later in 2004 in another project that I did for the Human Resources office. Further, my internship also enabled me to “own” pieces of the projects I worked on and taught me valuable lessons in project management to add to my MTSC coursework.

The lessons I learned during my internship have influenced and continue to
influence my career as a technical communicator in the IT industry. I was able to experience the work culture in a university, establish relationships that grew, and understand how working in the university is similar to a corporate setting in some aspects and differs from it in other aspects. The memories and experience that I accumulated during and after my internship while at Miami University have continued to enrich my life. I have since made a geographical move to Texas and returned to a corporate setting. However, my exposure to technical communication projects at Miami University have effectively honed my skills making my transition back to the corporate world simple by arming me with the ability to adapt to different technologies as well as audiences with ease.
Bibliography


Appendices

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Appendix B: IT Services Annual Report 2004 (or IT Services Strategic Plan)
Appendix C: KB Tutorial—Index and Content
Appendix D: Tutorial sample with screen prints
Appendix E: LIS Project: Support Services Survey Report 2004
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  List of URLs for other projects
    IT Services Web site
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    Online Technology Guide
Appendix A: IT Services Support Services and Campus Partnerships
Organizational Chart

Dated: 3/19/06
Appendix B: IT Services Strategic Plan

The Miami University IT Services Strategic Planning information can be found at:

http://www.units.muohio.edu/mcs/ITStrategicPlan/index.shtml
Appendix C: KB Tutorial Content

KB Tutorial Index List

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Tutorial Content

General Introduction—

Welcome to the Miami University Knowledge Base Adding a Case tutorial. In this tutorial, you will learn the basics of contributing cases to the Knowledge Base. You will learn about searching for cases in the KB contributors’ role in the KB guidelines on how to create cases all about cases adding a new case in the KB Throughout the tutorial, you will take assessments on topics you cover. At the end of the tutorial, you may create a case in the Knowledge Base training area.

Click Navigation to see tips on how to navigate this tutorial.

Navigation

Case Guidelines

All information in the Knowledge Base is arranged in cases.

Before you create a new case in the KB, take note of the following important points.

A case should be created if the content:
is not already in the knowledge base
will be of value to multiple users and has the potential to reduce calls to support staff
will be relevant for a reasonable amount of time (there may be exceptions to this)
does not require security
provides information that can be communicated at a novice level and is safe for clients to follow (or contains sufficient warnings)

Before creating a new case, always review the Knowledge Base to see if the same or similar content already exists.

Take note of the language and format used for cases covering the same subject area.

Searching for a case
One of the first actions in creating cases is to search to see if there are similar cases already in the KB. Let’s take a few moments to understand how users search for cases.

There are three ways users locate relevant cases:

The search box on the home page
The Advanced Search page
The Help With box on the home page
Key words from the search phrase the user enters are compared to problems in the Knowledge Base and a list of matching problems is returned for the user to make a selection.

(Need graphic of entering a search term and returning relevant cases)

The Advanced Search page
Key words from the search phrase are compared to the full text of all the cases and a list of case titles is returned for the user to make a selection.

(Need graphic of entering a search term and returning relevant cases)

The Help With box on the main page
Users drill down to find lists of problems associated with categories of information.

The Role of Contributors
Contributors are Subject Matter Experts. They provide the content that makes the Knowledge Base a valuable resource. Within their subject area, contributors are responsible for:
Adding new content to the knowledge base
Regularly reviewing existing content for continued accuracy and relevancy
Testing the accuracy and applicability of content they submit and/or review

Case Components
When you create a case, you will enter information in the different components of the case. Each part or component of a case contains a category of information. Not all of these components are required in every case. The components of a case are
Case Title
Cause Title and Description
Solution Title and Description
Related Items
Problems

Case Title

Every case should have a case title. The case title indicates the topic of the case. If relevant, it contains the program, version, and operating system that the case addresses.

You can see the case title as a clickable link in lists throughout the Knowledge Base including the list returned once a user selects a problem, the “Current Interest” list on the Knowledge Base home page, and the “Related Items” list within a related case. Show all three screen shots.

Cause Title and Description
A cause is a statement as to why a particular problem is occurring. Including a cause is optional; many cases do not include a cause. Show a cause with cause title and description.

Solution Title and Description
The solution is the meat of a case. It provides the information or instructions the reader needs. The solution title provides a short, clear statement as to what the solution will help the user do; the solution description provides all of the details.

Related Items
Related Items is a list of
Additional cases in the Knowledge Base have information that may be of particular interest to the reader of the case. If another case contains information necessary to fully implement the solution, it is referenced under Related Items.
Additional problems the reader of the case may be interested in exploring.

Problems
Problems are questions/statements users might pose to the knowledge base to find information. Problems should reflect the symptoms/system behavior or information need the user is experiencing.

The search function on the home page compares the user’s search phrase to problems in the Knowledge Base and returns a list of problems that match up with the search phrase. If a case doesn’t have meaningful problems associated with it, users have little way of finding it.

Assessment covering case components and search
Multiple choice or True/False
Example:
Every case must have a cause.
Problems are vital because they help users in searching for solutions.
Related Items listed in a case include cases and problems related to the one the user has accessed.

Add a New Case
In this section of the tutorial, you will learn how to create a new case. As we perform a step, we will also talk about the style guidelines for that step. It is important that you follow set guidelines when you create content for the KB so that the KB will have a consistent look and feel to the users, irrespective of the content.

Before you start, print handouts.
Use Contributors’ QRF Guide B for instructions. Insert style guidelines and exercises.

⇒ Step A: Sign in to the Knowledge Base as a contributor

Open your web browser and go to kb.muohio.edu. Click Contributor’s Site.
From the Select a Knowledge Base dropdown box, choose “Miami University Knowledge Base” and click Sign In. (If you wish to practice in a test environment, choose the Training Knowledge Base.)
Enter your ID and password and click Next. Your “In Box” will appear with a tabbed menu bar at the top allowing you to navigate the authoring knowledge base.

You will see four sections in your Inbox.
Contribution: any cases that you or other KB Contributors are working on appear here. The case appears here until you finish working on it and pass it to the next review stage
Technical Review: This stage is an optional review for technical accuracy. If you would like a colleague to review your case before you send it to the KB team for editing, you should inform the colleague.
Editorial Review: In this stage, the KB staff reviews each case for grammar and style. You may not have access to this stage.
Trash: You can put a case that needs to be discarded in Trash. The KB staff will then delete the case from the database.

⇒ Step B: Make sure the information you are submitting is not already in the Knowledge Base

Click Browse in the tabbed menu bar. This will bring you to the KB home page.
Under Search the Knowledge Base, click the “Advanced Search” link.
In the Natural Language Query box, type keywords that relate to the topic your case addresses.
Click Go! The KB will return a list of cases that contain your keywords.
Click the case title to review any case that seems similar to what you are adding.
If a case exists that contains almost—but not quite—all the information you wanted to convey, make note of the Case ID and edit that case rather than create a new one.
If you see a case that you’d like to link to yours as a related item, make note of the Case ID; you’ll need that to create the link later.

Now that you have verified that the information you are about to enter is not in the KB, and have identified any other cases that may need to be linked to your case, your next step is to upload any attachments (images or linked files).
⇒ Step C: If your case contains images or linked files, upload those to the Knowledge Base server

**Note:** All images must be in .gif or .jpg format. Files can be in any format (PDF, Word, PowerPoint, etc.) but will only display if the person viewing the file has the application installed on their computer.

Click **Add Files** in the tabbed menu bar in your Inbox. (You may have to click the Back button on your browser until you see your Inbox.)

Click the appropriate radio button for the type of files you wish to upload:

- **Images:** image files to display in the case (e.g., screenshots or other graphics)
- **Attachments:** documents to link to (e.g., PDF, Word or PowerPoint files)

Adjust the “**Approximately how many files do you wish to upload?**” dropdown to reflect a number higher than the number of files you wish to upload. Click **Next**.

Under **Browse Existing Directories**, click the “**MUKB/Images**” link. Check to see if there is an image folder related to your topic or any image files with the same file names as your files.

**Optional:** If a directory doesn’t already exist and you have multiple images you would like to keep together, type a directory name in the **Enter Directory** box.

Click **Next**.

Click the **Browse** button next to the first empty box and navigate to locate the file you wish to upload. The local file name including the path will appear in the **Upload** box.

Make sure the file name (without the path) appears in the **Save As** box immediately under the **Upload** box. If there are any spaces in the file name, remove them.

Repeat with the following boxes until you have selected all the images (or attachments) you wish to upload. Click **Next**.

Make note of the `<img src>` tags (for images) or `<a href>` tags (for attachments) on the next page. You will need to use these in the body of your case. (You may wish to print this page). Click **Finish**.

### Assessment

You can upload the following to the KB server and attach them to your cases.

- Images
- Files
- Images and files
- None of the above

Creating a directory is an efficient way to organize images that should be kept together. T/F

⇒ Step D: Add your case

Click **Add Case** in the tabbed menu bar.

Fill in the case title using the following guidelines.

**Case Titles:**
- Use sentence case (capitalize only the first letter of the first word and proper nouns) with no punctuation.
- Use terms familiar to a novice user and clearly indicate the topic of the case.
- If appropriate, identify the software application, version, and operating system to which the case applies. Place the operating system in parentheses at the end of the title.
Word as a statement, not a question (e.g. “Installing Eudora Pro” not “How do I install Eudora Pro?”). Word as an action, not a command (e.g. “Installing Eudora Pro” not “Install Eudora Pro”). Do NOT include quotation marks due to conflicts with the Remedy system. Click **Next**.

**Fill in the cause title and description. This is an Optional step.**

**Cause Title (optional):**
Use title case (capitalize every word except articles such as "the", "a" or "an") with no punctuation. Use terms familiar to a novice user and succinctly indicate why the situation the case addresses is occurring.

**Cause Description (must be provided if a Cause Title is used):**
Use terms familiar to a novice user. Provide details as to why the situation the case addresses is occurring.
Format using HTML tags if possible. Click **Next**.

**Exercise**
Every case should have a cause.
Cause titles should use title case (capitalize every word except articles such as "the", "a" or "an").

**Fill in the solution title and description using the following guidelines.**

**Solution Title (required):**
Use title case with no punctuation (capitalize every word except articles such as "the", "a" or "an"). Use terms familiar to a novice user. Succinctly indicate what the solution will help the reader do. Do NOT phrase as a question.

**Solution Description (required):**
Use terms familiar to a novice user.
If outlining a solution, provide step-by-step instructions as to how to implement the solution using a numbered list.
Use bold to indicate menu items and bold with quotation marks to indicate commands or buttons.

**Example,**
Add screenshots or other graphics if they will aid the reader in implementing the solution. Graphics should be in .gif or .jpg format and no more than 500 pixels wide.
If there is any risk associated with the solution, clearly identify the risks to the reader.
Format using HTML tags if possible.

**HTML Note**
If you do not have the time (or the comfort) to format your cause and solution descriptions with HTML tags, please contribute anyway. We can add the HTML tags easily; we can’t add the knowledge in your head.

Click **Next**.

**Exercise**
Covering Solution title and description--
Every case should have a solution. T/F
Make the case user friendly by
Including graphics in all cases
Using terms that a novice user can easily understand
Using links
You need to know HTML to be able to contribute to the KB. T/F
Identify any related cases and/or problems by providing the Case or Problem IDs. Click **Next.**
If you’ve referred to any other cases in your case, or if you know readers of your case will need information in other cases, you should relate them. If you don’t know the IDs to use, you can click the link provided to Search the Knowledge Base and locate the IDs. Identify the problems that should be associated with this case. Every case should have a problem. Problems are how a user searches for a case in the KB. If you know the ID of an existing problem and want to link that problem, enter the problem ID in box in the Link to an Existing Problem section and click Link. OR Type in the question/statement you believe users might enter in the box in the Describe the Question or Symptom this Case Addresses section and click Add This Problem.

It (?) will automatically search the KB and display a list of similar problems. Review the list and either select an existing problem or indicate you want to add the problem you entered (at the top of the list, preceded by “New?”) with a checkmark and click Done.

Problems:
Use sentence case with no punctuation unless it is a question. Use simply worded questions or statements. Create as many as necessary to address all the reasons a user would need the information contained in the case. Select a score for the problem from the Score dropdown list. The score indicates how on target the case is in terms of addressing that particular problem. The range is 5 to 95 with 95 being the highest. Note: If desired, you can create/associate more problems with the case by entering another problem and clicking Add this problem. When you are done adding and scoring problems, click Finish.

Exercise
Every case should have at least one problem. T/F
The optimal use of problems is to:
search existing problems in the KB to see if a problem matching your case already exists and link to that
Enter a new problem statement for each case.
A case can have more than one problem to address all the reasons a user would need information contained in a case. T/F
Problems can be in the form of a question. T/F
Review the case you’ve entered by scrolling down and clicking Preview case in new window.
If you need to make modifications, click the Edit . . . button beside the element you wish to change. Click the Approve button to approve the case. If appropriate, adjust the review date and content owner according to the guidelines.
Exercise
Clicking the Approve button after entering a case is optional. The review date is important to keep the case current.

Choose what you would like to happen with the case (see below) and click Next. Click Save if you want to work on the case some more at a later time. Click Technical Review if you want to have a colleague or IT Services review the content for technical accuracy. You must notify the person who should review your case.
Click Editorial Review if you are comfortable with content accuracy and ready for a pre-publication review.

**Exercise**

T/F  
Technical Review is an optional stage in the workflow process.  
You must notify the person who should review your case for technical accuracy.  
All cases go through the Editorial Review.

Review

In this tutorial you learned how to  
Identify material for KB cases  
Search for KB cases  
Upload files and images to the KB server  
Add a new case including the style guidelines  
Put a case in the appropriate review stage in the workflow
Appendix D: Tutorial Sample Screen Shots

Template Design
Contributing to the M.U. Knowledge Base Tutorial

Introduction

Welcome to the "Contributing to the Miami University Knowledge Base" tutorial. In this tutorial, you will learn the basics of contributing cases to the Knowledge Base. You will learn about:

- How to search for cases in the KB
- How do contributors participate in the KB
- Guidelines on how to create cases
- All about cases
- Adding a new case in the KB

Throughout the tutorial, you will take assessments on topics you cover. At the end of the tutorial, you may create a case in the Knowledge Base training area.

To learn how to navigate through this tutorial, click on the "Navigation" link in the left navigation area.
Contributing to the MI Knowledge Base Tutorial

Introduction

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Click to advance to the "Next Topic"
Appendix E: Internship Projects Samples

Support Services Survey 2004 Report
New Faculty Memo introducing the Knowledge Base
Support Services Survey Results Memo

TO: Vice President, Information Technology Services
FROM: Assistant Director, Support Services, IT Services
DATE:
RE: Support Services Survey Results

Executive Summary

Each spring, Support Services distributes a survey with questions related to satisfaction, use, and awareness of our services to a random sample of faculty, staff and students. The survey specifically addresses our main “front door” services: the Support Desk, the Knowledge Base, and the Training Modules. In Spring 2004, we sent the survey to a random sample of 1800 students, staff and faculty, out of which a total of 235 responded for a response rate of 13%.

The survey results are used in Support Services service planning and refinement efforts.

Highlights from comparing Spring 2004 Survey Results to Spring 2003

Satisfaction with the Support Desk increased.

We asked the survey recipients to rate their satisfaction with the above mentioned services using a 5 point Likert scale (with 1 being totally dissatisfied and 5 being totally satisfied). The mean satisfaction rating for the Support Desk increased from Spring 2003 to Spring 2004. Satisfaction with the Knowledge Base remained the same, while satisfaction with the training modules decreased.

![Support Center Service Satisfaction Ratings](chart)

Use of the Support Desk, Knowledge Base and Training Modules increased.
Since the survey is distributed to a random sample of faculty, staff, and students – one of the items we are interested in is how many people are actually using our services. The answer: more than 2/3rds use the Support Desk and more than 1/3rd use the Knowledge Base; both of these figures are higher than last year. Use of the training modules increased significantly from 11% (2003) to 25%.

Percentage of people using the…

<table>
<thead>
<tr>
<th></th>
<th>Spring 2003</th>
<th>Spring 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Desk</td>
<td>65%</td>
<td>66.2%</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>35%</td>
<td>38.5%</td>
</tr>
<tr>
<td>Training Modules</td>
<td>11%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Awareness of the Support Desk and Knowledge Base remained static while awareness of Training Modules decreased. The number of people responding that they “didn’t know” about the Support Desk and Knowledge Base remained similar to last year. There was a decrease in the awareness about the training modules, although usage increased.

Percentage of people **aware** of the . . .

<table>
<thead>
<tr>
<th></th>
<th>Spring 2003</th>
<th>Spring 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Desk</td>
<td>97%</td>
<td>97%</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>78%</td>
<td>78%</td>
</tr>
<tr>
<td>Training Modules</td>
<td>74%</td>
<td>55%</td>
</tr>
</tbody>
</table>

As with previous years, the most common comment in Spring 2004 survey was again “please do more to promote your services.”

Appreciated by survey respondents

**Support Desk staff is very professional, friendly and knowledgeable.** Many survey respondents reported in answer to “what do you like most about support from the Support Desk?” that they appreciated the Support Desk staff’s helpful, effective and immediate response to their problems.

A few quotes:
“Even with a high call volume, the staff does an awesome job of helping those who call in.”
“When leaving a message someone usually gets back to me in a timely manner. [The Support Desk analyst] called me at home too.”
“I can email a question and get a quick and accurate response.”

Areas noted for improvement by survey respondents

Do a better job of letting people know about our services, particularly the Knowledge Base and Training Modules. This was the most frequently occurring comment received (both last year and this).

**Decrease response time and reduce times that people need to leave messages (Support Desk).** The specific questions about Support Desk service received very positive responses on all aspects of the service (see full survey results for details). The aspect that received the lowest average rating was “my questions were solved in a reasonable time” (4.18 on a 5 point scale). Timeliness of response and frustration with needing to leave a message and wait for a call-back were noted as issues in some full-text comments.
**Improve the Knowledge Base.** In response to specific questions about the Knowledge Base, respondents indicated that they felt the Knowledge Base could be improved through better navigation, expanded content and less technical language.

Additional information on the survey

**Dashboard metrics.** The following page presents the dashboard metrics/highlights from the survey. The metrics are broken down by user group (faculty, staff, graduate and undergraduate students).

**Complete survey and tabulated answers.** The survey and raw results are available on line at: [http://www.admin.muohio.edu/cfapps/survey/results.cfm](http://www.admin.muohio.edu/cfapps/survey/results.cfm)

**Statistical analysis of the results.** A statistical summary and analysis of the results is attached.
The overall client satisfaction ratings for all three services – Support Desk, Knowledge Base, and Training Modules. The Support Desk received the highest satisfaction rating (4.65), followed by the Knowledge Base (3.67) and then the training modules (3.17).

The percentage of respondents reporting that they were aware of the services remained the same for the services, except for the training modules, which decreased although usage of training modules increased.

The percentage of respondents using the Support Desk and Knowledge Base increased; the percentage of respondents using the Training Modules remained the same.

The percentage of respondents indicating that they would use the Support Desk and Training Modules in the future increased.

Information Technology Services Support Services - Dashboard Metrics
Drawn from Spring 2004 and Spring 2003 Client Satisfaction Survey Results
## Information Technology Services Support Services - Dashboard Metrics

**Drawn from Spring 2004 and Spring 2003 Client Satisfaction Survey Results**

### Satisfaction with Support Center Services

<table>
<thead>
<tr>
<th></th>
<th>Support Desk Satisfaction Rating</th>
<th>Knowledge Base Satisfaction Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Undergrad Students</td>
<td>Grad Students</td>
</tr>
<tr>
<td>2001-2002</td>
<td>3.68</td>
<td>n/a</td>
</tr>
<tr>
<td>2002-2003</td>
<td>4.14</td>
<td>4.25</td>
</tr>
<tr>
<td>2003-2004</td>
<td>4.58</td>
<td>5</td>
</tr>
</tbody>
</table>

### Use and Awareness of Support Center Services

<table>
<thead>
<tr>
<th></th>
<th>Use of the Support Desk</th>
<th>Awareness of the Support Desk</th>
<th>Plan to use service again</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Desk</td>
<td>53%</td>
<td>65%</td>
<td>66%</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>29%</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>Training Modules</td>
<td>14%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Knowledge Base Introduction Memo

TO:         New Miami Faculty
FROM:      The Miami University Knowledge Base (MUKB) Team
DATE:
RE:        MU Knowledge Base—Online Answers to Technology Questions

We would like to make you aware of the Miami University Knowledge Base (http://kb.muohio.edu), Miami’s 24-hour online technology support service. The site is your online resource for answers to questions that you or your students may have regarding technology on campus.

Accessing the KB
You can access the Knowledge Base through the myMiami webpage, or directly at http://kb.muohio.edu. On the myMiami page, look for the Knowledge Base under Quicklinks on the right.

Finding Information in the KB
There are multiple ways to find information in the KB:
Peruse the Current Interest List provided on the home page
Choose from pre-arranged categories that cover most frequently used topics
Enter your search criteria
The Knowledge Base search engine will provide a list of problems that match your search input. Then, click on the problem that seems most relevant and you will find a list of cases that address your issue.

We encourage you to make your students aware of Knowledge Base and the services it provides. You might want to include the link in your syllabi as a technology resource. By using this service, students will potentially become more familiar with technology here at Miami and in general.

If you find technology topics that are not covered in the KB, and you would like to see them covered, please use the Feedback link on the KB home page to contact us.

Thank you for your efforts.
# List of URLs of Other Projects During Internship

<table>
<thead>
<tr>
<th>Service</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telecommunications Website</td>
<td><a href="http://www.muohio.edu/telecommunications/">http://www.muohio.edu/telecommunications/</a></td>
</tr>
<tr>
<td>IT Services Website Homepage</td>
<td><a href="http://www.muohio.edu/itservices">http://www.muohio.edu/itservices</a></td>
</tr>
<tr>
<td>Online Technology Guide</td>
<td><a href="http://www.muohio.edu/technologyguide">http://www.muohio.edu/technologyguide</a></td>
</tr>
</tbody>
</table>