Interpreting the Knowledge Management (KM) Dashboard

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3 Views

**Published to customer portal:** No

**Overview**

The Knowledge Management (KM) dashboard provides a window into how knowledge is currently being consumed in EpicCare by internal and external users.  Managers and knowledge administrators are able to access the KM dashboard by navigating to the EpicCare homepage, clicking the **Switch to page...** dropdown list, and selecting **Knowledge Management**.  Other users requesting dashboard access, please create an EpicCare case.

The dashboard tracks metrics and key performance indicators (KPIs) such as first call resolution (FCR), case/call deflection, and mean-time-to-resolve (MTTR) a case with knowledge attached.  The dashboard also helps the KM team, along with senior leadership, to keep an eye on the state of knowledge, including the volume of articles created per team, expired knowledge, and new requests for knowledge from internal and external customers.

This Quick Reference Guide (QRG) article explains the widgets on the dashboard and how this data should be interpreted.

**Related Links**

N/A

**KM Dashboard Widgets**

End-users reference the table below to understand the functional purpose of each of the widgets/charts on the KM dashboard.

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| --- | --- | --- |
| **Widget Name** | **What it Measures** | **Additional Metrics/Scorecard Information** |
| Total Knowledge by Product | A measure of the total knowledge published in EpicCare to-date per Knowledge Base (KB) | To view additional metrics for any of the Products represented, click the corresponding bar in the graph to view more information.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| KB Usage vs KB View | A comparison of the volume of knowledge articles viewed from the case form versus the volume of knowledge articles attached/used on the case form  **Note**: *The red dotted line indicates the volume of knowledge used (attached to a case). The column or bar graph represents knowledge views.* | To view additional metrics for knowledge used in any given month, click the corresponding dot for that month.  To view additional metrics for knowledge viewed in any given month, click the corresponding bar in the graph for that month. |
| Call Deflection (Enterprise) - Global | Measures the total number of times an external customer resolved his or her own issue using a knowledge article found on the Customer Portal  **Note**: *This widget is a global view for all Products.* | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click the Breakdowns tab to view data for each Product team.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Call Deflection (Product View) - Global | Represents the Product teams that had an external customer resolve his or her own issue using a knowledge article found on the Customer Portal  **Note**: *This widget is the per Product view.* | To view additional metrics for any Product team, click the corresponding monthly value to open a more detailed scorecard.  Click the Breakdowns tab to view regional data for that month.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Call Deflection (Enterprise) - Customer Case Form | Measures the total number of times an external customer resolved his or her own issue using a knowledge article found while searching from the Case form  **Note**: *This widget is a global view for all Products.* | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click the Breakdowns tab to view data for each Product team.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Call Deflection (Product View) -Customer Case Form | Represents the Product teams that had an external customer resolve his or her own issue using a knowledge article found while searching from the Case form  **Note**: *This widget is the per Product view.* | To view additional metrics for any Product team, click the corresponding value for that month. This opens a more detailed scorecard.  Click the Records tab to view data for that month.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Call Deflection (Enterprise) - Outside of Customer Case Form | Measures the total number of times an external customer clicked Yes as helpful on the Customer Portal | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click the Breakdowns tab to view data for each Product team.  Click a Product team's name to view data for that team.  Click the Records tab to view the articles for that month.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Call Deflection (Product View) - Outside of Case Form | Represents the Product teams that had an external customer click Yes as helpful on the Customer Portal | To view additional metrics for any Product team, click the corresponding value for that month. This opens a more detailed scorecard.  Click the Records tab to view the articles for that month.    **Note**: *Click the back arrow to return to the KM Dashboard.* |
| KB Attached - FCR 24 Hours (Enterprise)    First Call Resolution (FCR) | A measure of the total number of cases resolved within 24 hours with a knowledge article attached.  **Note**: *This widget is a global view for all Products.* | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click a Product team's graph to view the respective list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| KB Attached - FCR 24 Hours (Product View)    First Call Resolution (FCR) | Represents the Product teams that had cases resolved within 24 hours with a knowledge article attached.  **Note**: *This widget is the per Product view.* | To view additional metrics for any Product team, click the corresponding value for any month. This opens a more detailed scorecard.  Click the Records tab to view data for that month.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| KB Attached - TTR 24-48 Hours (Enterprise)    Time-To-Resolve (TTR) | Measures the number of cases resolved within 24-48 hours with a knowledge article attached.  **Note**: *This widget is a global view for all Products.* | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click a Product team's graph to view the respective list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| KB Attached - TTR 24-48 Hours (Product View)    Time-To-Resolve (TTR) | Represents the Product teams with cases resolved within 24-48 hours with a knowledge article attached and the average time taken to resolve that case.  **Note**: *This widget is the per Product view.* | To view additional metrics for any Product team, click the corresponding value for any month. This opens a more detailed scorecard.  Click the Records tab to view the list of cases and articles for that month.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Articles Attached (Enterprise) | A measure of articles attached to cases per month across all Products.    **Note**: *Cases can be in any state.* | To view additional metrics for any given month, click the respective bar in the graph to see the list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| Articles Attached (Product View) | Represents the Product teams with articles attached to cases on a monthly basis.    **Note**: *Cases can be in any state.* | To view additional metrics for any Product team, click the corresponding bar in the graph to see thelist of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *The additional data opens in a new window.* |
| Cases Closed with KB Attached (Enterprise View) | A monthly measure of the total number of cases closed with knowledge attached | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click a Product team's graph to view the respective list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| Cases Closed with KB Attached (Product View) | Represents all Product teams that closed cases with knowledge attached | To view additional metrics for any Product team, click the corresponding bar in the graph to see the list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *The additional data opens in a new window.* |
| Number of Agents Attaching KB to Cases (Enterprise) | A measure of the number of agents actively attaching knowledge articles to cases | To view the list of agents for any given month, click the corresponding bar in the graph to open a more detailed scorecard.  Click the Breakdowns tab to view the list of Product teams and the volume of articles for that month.  **Note**: *Click the back arrow to return to the widget in its original state.* |
| Number of Agents Attaching KB to Cases (Product View) | Represents all Product teams with agents actively attaching knowledge articles to cases | To view additional metrics for any Product team, click the corresponding value for any month. This opens a more detailed scorecard.  Click the Records tab to view the list of cases and articles for that month.  **Note**: *Click the back arrow to return to the KM Dashboard.* |
| Knowledge Viewed Global (Enterprise) | A measure of the number of articles viewed on a monthly basis by internal and external customers | To view additional metrics for any given month, click the respective bar in the graph to open a more detailed scorecard.  Click a Product team's graph to view the respective list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| Knowledge Viewed Global (Product View) | Represents all Product teams with knowledge viewed | To view additional metrics for any Product team, click the corresponding bar in the graph to see the list of articles viewed for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.    **Note**: *The additional data opens in a new window.* |
| Knowledge Viewed by Case -Internal vs External (Enterprise) | A comparison of internal versus external users viewing knowledge from the case form    **Note**: *The gold bar graph represents internal users. The coral bar graph represents external users.* | To view knowledge viewed by internal users in any given month, click the corresponding (gold) bar in the graph for that month.  To view knowledge viewed by external users in any given month, click the corresponding (coral) bar in the graph for that month.  Click a Product team's graph to view the respective list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| Knowledge Viewed by Case -Internal (Product View) | Represents all Product teams with internal users viewing knowledge from the case form | To view additional metrics for any Product team, click the corresponding bar in the graph to see the list of articles viewed for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *The additional data opens in a new window.* |
| Knowledge Viewed Outside Case Form - Internal vs External (Enterprise) | A comparison of internal versus external users viewing knowledge outside of the case form  **Note**: *The gold bar graph represents internal users. The coral bar graph represents external users.* | To view knowledge viewed by internal users in any given month, click the corresponding (gold) bar in the graph for that month.  To view knowledge viewed by external users in any given month, click the corresponding (coral) bar in the graph for that month.  Click a Product team's graph to view the respective list of articles attached for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| Knowledge Viewed Outside Case Form - (Product View) | Represents all Product teams with users viewing knowledge outside the case form | To view additional metrics for any Product team, click the corresponding bar in the graph to see the respective list of articles viewed for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *The additional data opens in a new window.* |
| KB Submissions (Enterprise) | A measure of all knowledge requests submitted on a monthly basis | To view knowledge requests submitted in any given month, click the corresponding bar in the graph for that month.  **Note**: *The additional data opens in a new window.* |
| Knowledge Viewed by Case - External (Product View) | Represents all Product teams with external users viewing knowledge from the case form | To view additional metrics for any Product team, click the corresponding bar in the graph to see the respective list of articles viewed for that month.  To remove data for any Product team, click the corresponding link at the bottom of the widget.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| KB Submissions -Submission vs Closed Article Created | A monthly comparison of the volume of knowledge requests submitted versus the number of articles created from those submissions    **Note**: *The bisque (pink) bar graph represents submissions. The reddish brown dotted line captures articles created.* | To view additional metrics for knowledge requests submitted in any given month, click the corresponding bar in the graph for that month.  To view additional metrics for knowledge articles created from submissions in any given month, click the corresponding dot for that month.  **Note**: *The additional data opens in a new window.* |
| KB Submissions - by Status | A breakdown of knowledge submission requests by status.    **Note**: *For additional information on knowledge request statuses, please refer to*[*Status of a Knowledge Submission Request*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0028076)*.* | To view metrics for a particular status in any given month, click the corresponding bar in the graph.  To remove data for any status, click the corresponding link at the bottom of the widget.  To view metrics for a particular Product team, click the hyperlinked value for that team.  **Note**: *Click the refresh icon to view the widget in its original state.* |
| Open KB Tasks | The total volume of all open KB Tasks currently pending review.  **Note**: *For additional information on handling KB tasks, please refer to*[*Handling KB Tasks*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0032131)*.* | To view a list of KB tasks for a specific Product team, click the hyperlinked value for that team.  **Note**: *The additional data opens in a new window.* |
| Expired Knowledge | The total volume of all expired knowledge articles in EpicCare.  **Note**: *This knowledge is not visible/searchable to end-users.* | To view a list of expired knowledge articles for a specific Product team, click the corresponding bar in the graph for that team.  **Note**: *The additional data opens in a new window.* |
| Knowledge Pending Approval | The total volume of all knowledge articles currently in a pending state in EpicCare.  **Note**: *This knowledge is in a Pending status and is not visible/searchable to end-users.* | To view a list of pending articles for a specific Product team, click the hyperlinked value for that team.  **Note**: *Click the back button to return to the KM Dashboard.* |
| Imported Knowledge | The total volume of imported content in EpicCare.  **Note**: *This widget also captures the current workflow status of the articles.* | To view the list of imported knowledge articles for a specific Product team, click the hyperlinked value for that team.  **Note**: *Click the back button to return to the KM Dashboard.* |
| Knowledge Updated in Past 30 Days | The total volume of knowledge articles updated in EpicCare within the past 30 days.  **Note**: *This widget also captures the current workflow status of the articles.* | To view the list of articles in a specific workflow status, click the hyperlinked value for that status.  **Note**: *Click the back button to return to the KM Dashboard.* |