

Wiki Creation & Help Ticket Best Practices ^[1]

March 7, 2021 by [Melanie Jones](#) ^[2]

Get Started, Then Grow

Always Important

Categorize correctly

- New categories can be created when necessary but shouldn't exceed 10 or so.

Select Categories Associated with Wiki

[View](#) [Edit](#) [Manage display](#) [Outline](#)

Title *

Node path: node/334569

Display Title

Title shown in blog header.

Category *

ecomm-wiki

Tips and Tricks

Success Stories

Salesforce

Marketing Cloud

eComm Specialist Resources

eComm Specialist Digests

Cvent

Campus User Groups

Faculty Council Newsletter

Committees

You can select multiple sub-categories but they must all belong to the same main

Summary *([Hide summary](#))

Categories on Site

Categorized in: [Cvent](#) [Marketing Cloud](#) [Salesforce](#) [eComm Specialist Resources](#)

Need Help? Start Here.

📅 November 4, 2019 by [jennifer.mortensen](#)

Click on the name of the tab below that matches the eComm category with which assistance:

Salesforce	Marketing Cloud	Cvent	eComm Specialists
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Link Related Wikis Together

- Be sure to link to related wikis within the new wiki and add the new wiki to existing, related wikis. This should be done throughout the body of the wiki, plus the footer section.
- Consider wikis that are newly related, often due to updating/enhancing a wiki.

Index: Need Help? Start Here.

- Add to any relevant sections/accordions and add new ones when necessary

Include wikis in Help Ticket

- Present relevant wikis within the Help Ticket to mitigate ticket submissions altogether.

Phased Approach

Which Wiki To Start With?

1. Start with the **simplest of tasks** (how to log in, meet the team, what we do, who we support, etc.).
2. Identify the **most frequent requests**. Educating in these areas will bring the most value quickly.

3. Make **new user training on-demand** - it will buy time to create advanced training materials or enhance existing ones. An unedited recording is a fine, short-term solution to start getting users trained without the time commitment of 1:1 training.
4. Are any **new items getting rolled out**? Get these documented so you can share the wiki resource and build adoption. Host one live session (less than 30 min. preferred) and make the recording available.
5. Save infrequent or the most complex requests for last.

Content Creation

- **Unedited Recording**
 - If unedited recordings exist, make them available as a short-term solution.
- **Written Instructions with *Example***
 - Bold words that reflect the exact word in the application.
 - Use a bullet point for each step.
 1. *Type in your desired **Template Name***
 2. *Select **Template** in the dropdown*
 3. *Click the blue **Create** button in the top right*
- **Screenshots**
 - ?Should be placed under the written instructions, with each step called out on the screenshot.
- **Context**
 - Define the task and give a use case for completing the step. Add a sentence about the previous and next steps and link to wikis with more information.
- **Diagrams**
 - Diagrams provide a great basis for common understanding across different groups and can minimize confusion. Request Access to [Venngage](#) [3], a tool for making infographics, icons, graphics, and more.
- **Recording**
 - Host a session by finding the resource in the index, following along with the wiki, and then posting the recording to the same wiki. This helps increase the adoption of the wiki by truly showcasing how a user can access the same resources.

NOTE Refrain from 'fixing' processes while documenting. While it's tempting to better a process when the opportunity is presented, it hinders progress. Get the current state documented, then prioritize areas to optimize.

How-To: Format Wiki Body

Text Formatting (Bold & Italics)

Add **bold** or *italics* to the formatting of the text.



Bullets / Lists

Add numbered or unnumbered lists, particularly for step-by-step instructions.



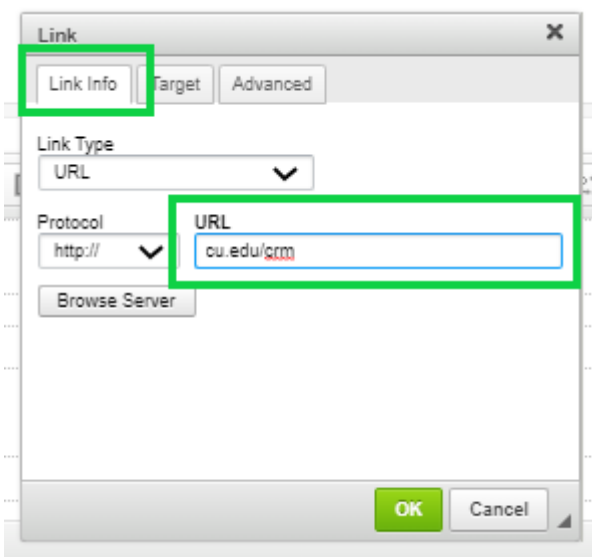
Links

- External Linking
- Internal Linking

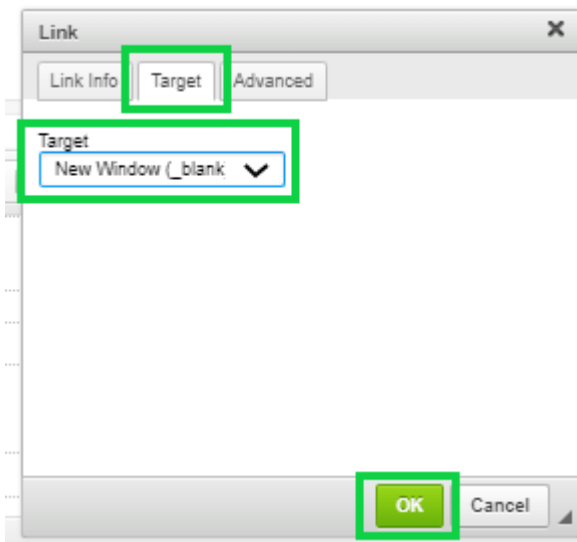
- Highlight the word(s) you wish to link, then select the **link icon** in the navigation.



- The **Link info** tab will open by default to include the **URL**



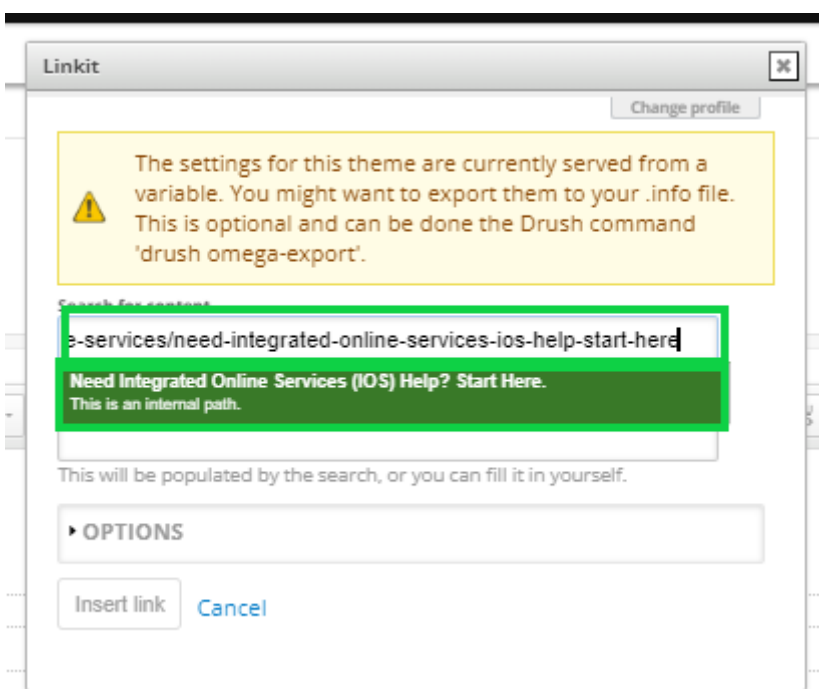
- Select the **Target** tab and choose **New Window blank** in the dropdown. Click the green **OK** button



- Highlight the word(s) you wish to link, then select the **link icon with the plus sign** in the navigation. It will read *Link to Content* when hovered.

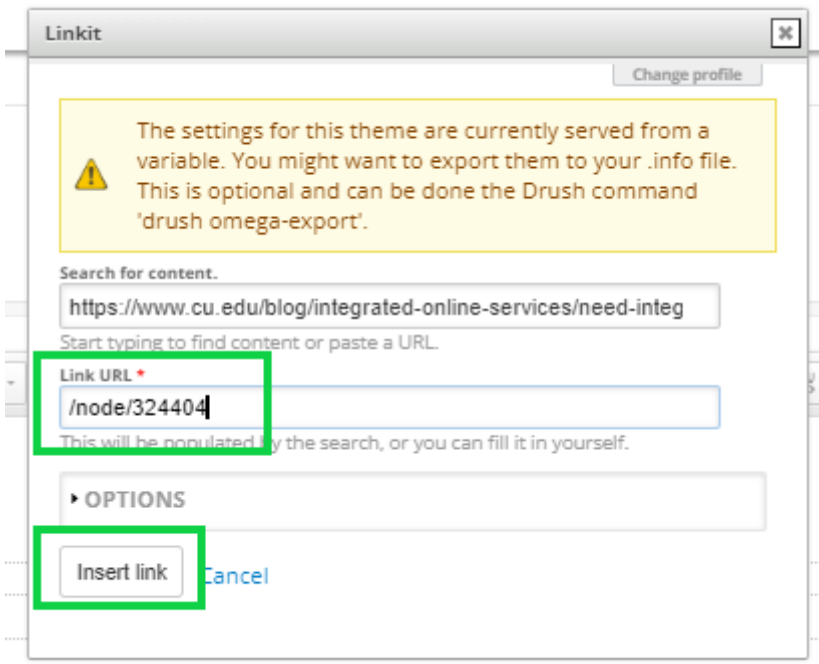


- Paste the internal link (cu.edu). Once it finds the URL, click the **green box**



- This gets the **Link URL** field to populate with the **node** (a best practice when linking to internal pages)
- Select the **Insert Link** button

??



- Use the **Internal Linking** directions to set the **Target = New Window Blank**. This ensures the link opens in a new tab, rather than refreshing the existing page.

Images

Click in the body of the post, where you want the image to be inserted. It's usually best to be on its line/paragraph.



- New Image
- Previously Uploaded Images
- **Choose File** then click **Next**

Media browser



The settings for this theme are currently served from a variable. You might want to export them to a file, which is optional and can be done the Drush command 'drush omega-export'.

[Upload](#)

[Web](#)

Upload a new file *

Choose File

9e7b4c55-f0...454 (16).png

Upload

Files must be less than **100 MB**.

Allowed file types: **jpg jpeg gif png txt doc docx xls xlsx pdf ppt pptx pps ppsx odt ods odp mp3 mov mp4 m4a m4v ico.**

Next

- Populate the **Alt Text**?
 - Provide alternative (ALT) text that is contextually relevant, accurate, and concise. For example:
 - lists the relevant data so that a bar graph can be understood
 - to explain what an image contains and why it is being used, rather than details about how the image looks
 - *DO NOT LEAVE BLANK. Although not a best practice, typing '**null**' is better than leaving it blank.
- Click the green **Save** button

Media browser

Name *

9e7b4c55-f0be-4d0d-9106-6298a3bda454 (16).png

Focal Point



[Image Preview](#)

Click and drag the crosshair to target the most important portion of the image. This portion of the image will never be cropped.

Title

Caption

Caption to appear below this image when displayed.

Photo Credit

Alt Text

HTML icon

Alternative text is used by screen readers, search engines, and when the image cannot be loaded. By adding alt text you improve accessibility and search engine optimization.

Title Text

Title text is used in the tool tip when a user hovers their mouse over the image. Adding title text makes it easier to understand the context of an image and improves search engine optimization.

► [URL REDIRECTS](#)

Previous

Save

- Choose **Display as: Original** in the dropdown
- Click **Submit**

Embedding 9e7b4c55-f0be-4d0d-9106-6298a3bda454 (16).png



[Edit file](#)

OPTIONS

Display as Original 

Choose the type of display you would like for this file. Please be aware that files may display differently than they do when they are viewed in a browser.

Title

Caption

Caption to appear below this image when displayed.

Photo Credit

Alt Text

Alternative text is used by screen readers, search engines, and when the image cannot be loaded. By adding alt text you improve the accessibility and optimization of your content.

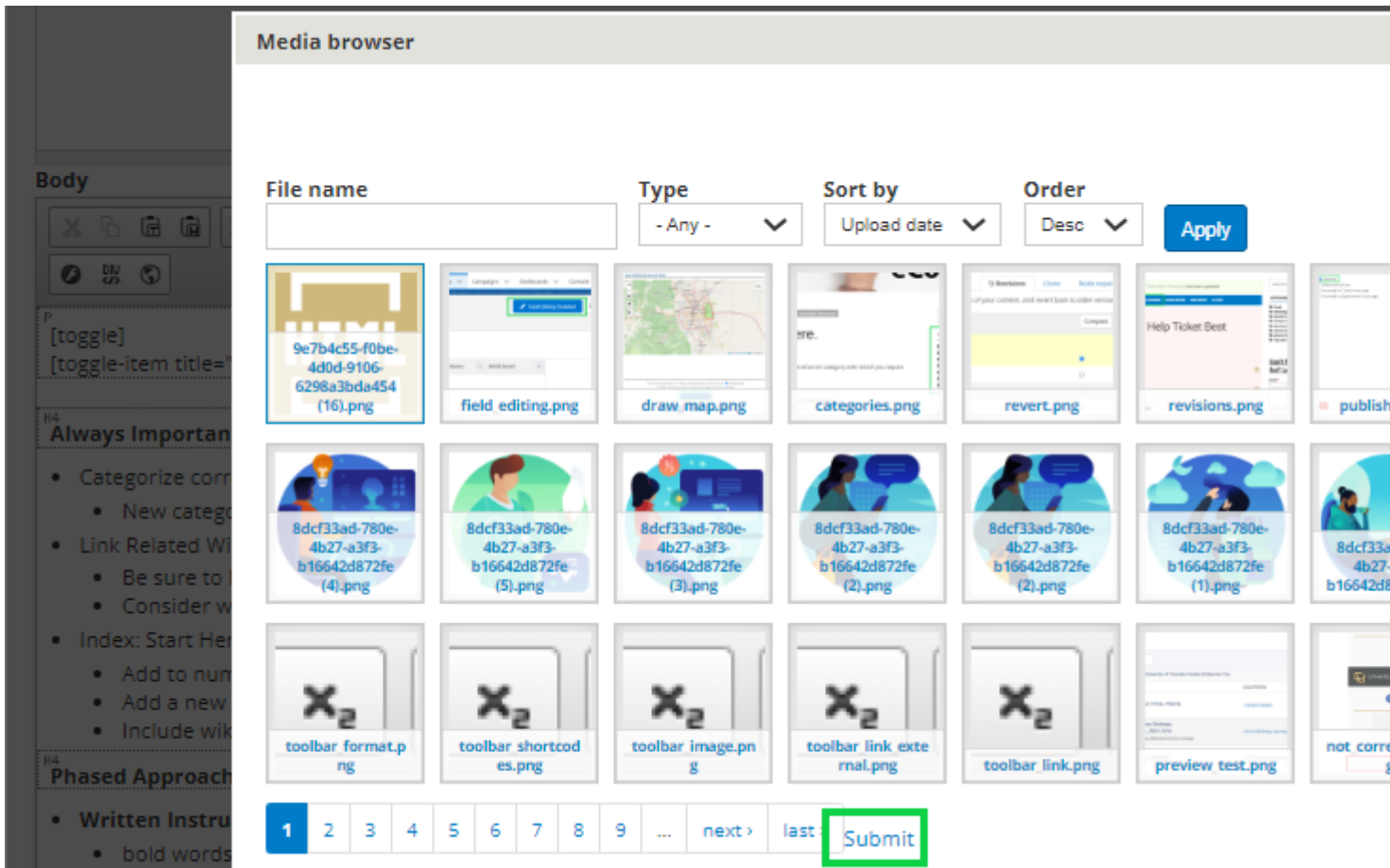
Title Text

Title text is used in the tool tip when a user hovers their mouse over the image. Adding title text makes it easier to understand the content and improves usability.

► [URL REDIRECTS](#)

[Submit](#)

- Access previously uploaded images in the **My Files** or **Library** tabs
- Click the image, then select **Submit**



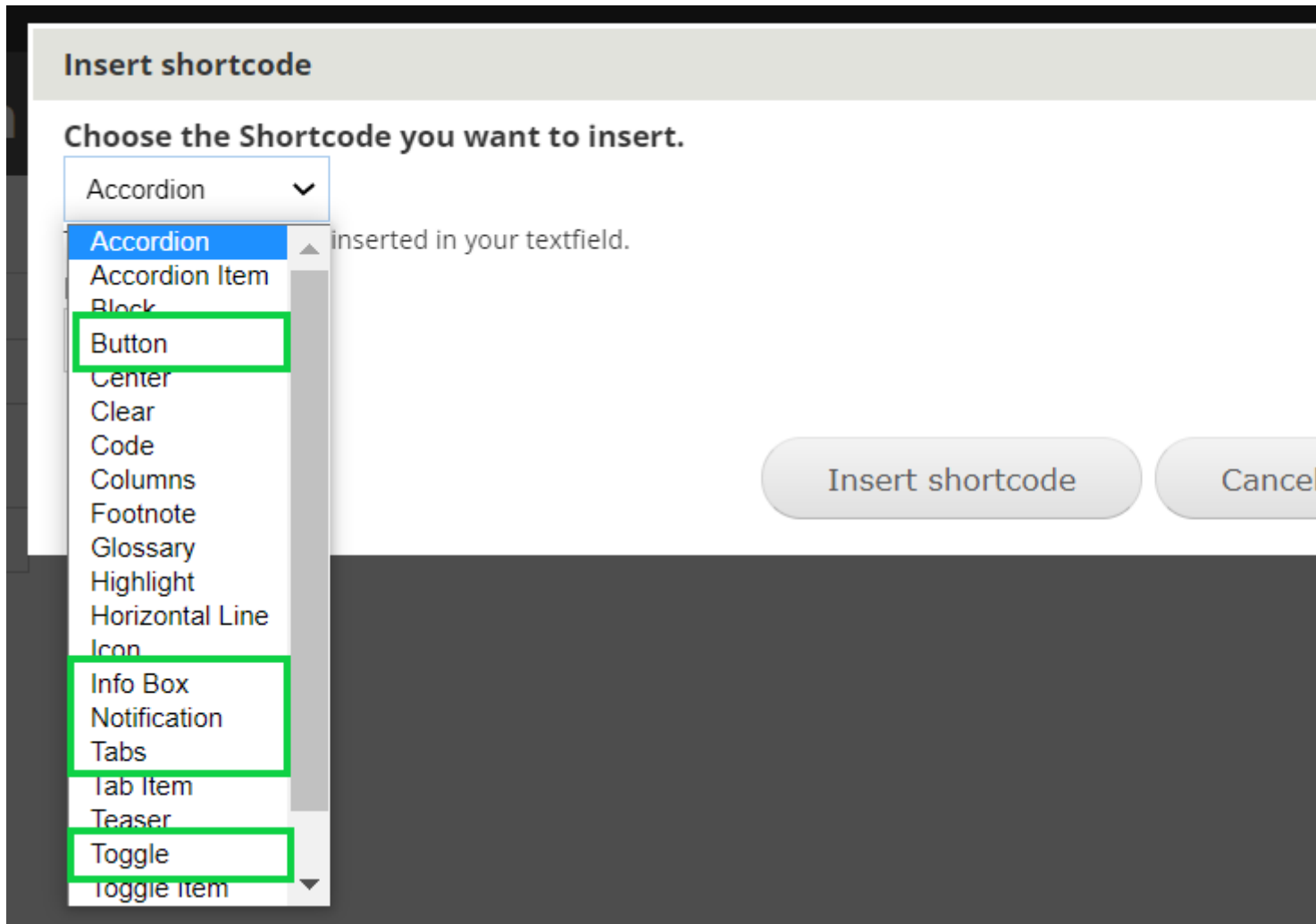
I typically leave the image as is. In cases where you need to re-size an image, click the image after it has been placed in the body, then select the **Image Icon** found to the left. Input the size in the pop-up.



Shortcodes

- Click in the body where you want to insert the shortcode
- Select the **Shortcodes icon (black box with down arrow)** in the top navigation
- A pop-up will appear (may need to scroll up on the entire page to find it)
- **Choose the Shortcode** you want to insert via the dropdown





- Different fields will be presented based on what Shortcode you select.
- **Fill out the details** and select **Insert shortcode**.
- In the example below, the **Button** was selected in the Shortcode dropdown.
- Populate details for:
 - **Button Title**
 - **Button URL**
 - **Button Size = Large**
 - **Button Color = Blue**
 - **Link Target = Blank**
- Click the **Insert Shortcode** button

Insert shortcode

Choose the Shortcode you want to insert.

Button ▼

This Shortcode will be inserted in your textfield.

Button Title

Link url

For external URL's enter `www.yourdomain.com` or `http://www.yourdomain.com`

For internal URL's enter `"/node/node#"`

Button size

Large ▼

Button Color

Blue ▼

Link target

_blank ▼

Float

left ▼

Insert shortcode

Cancel

Look at the tabs below to see how the most commonly used shortcodes appear to the viewer, along with the inserted shortcode. While many other options exist, wiki creators following these standards will:

1. Lessen the learning curve
2. Create a consistent wiki appearance for a more seamless user experience

You'll notice the shortcodes use brackets `[]` surrounding the shortcode name to start and end (with an additional `/`). This is important because after inserting some shortcodes, you will need to type in the body between these brackets to format your email as desired.

- Buttons
- Columns

- Infobox
- Notification Blocks
- Toggle / Accordion

Large Blue Button, Float=Left, Target=Blank ^[4]

^P
`[button url="/node/#" size="large" color="blue" target="_blank" float="left"]Large Blue Button`

Column 1

Column 2

Column 3

^P
`[col width="1-3"]Column 1[/col]`

^P
`[col width="1-3"]Column 2[/col]`

^P
`[col width="1-3" last="1"]Column 3[/col]`

Related Wikis

- Related Wiki 1
- Related Wiki 2
- etc.

^P
`[infobox title="Related Wikis"]`

- Related Wiki 1
- Related Wiki 2
- etc.

^P
`[/infobox]`

Important Callout warnings, important notes, or crucial pieces of information with red notification boxes.

Best Practices / Tips & Tricks / FAQs Add tips & tricks, best practices, frequently asked questions, or notes to blue notification boxes.

P

[notification bold="Important" color="notification-red"] Callout warnings, important notes o

P

[notification bold="Best Practices / Tips & Tricks / FAQs" color="notification-blue"] Add tips &

Toggle

Toggle Title Here

All toggles are closed by default, and all toggles can be expanded at a single time.

Toggle Title Here

Content Here

Toggle Title Here

Content Here

P

```
[toggle]
[toggle-item title="Toggle Title Here"]All toggles are closed by default and all toggles can be
[toggle-item title="Toggle Title Here"]Content Here[/toggle-item]
[toggle-item title="Toggle Title Here"]Content Here[/toggle-item]
[/toggle]
```

Notice above, that everything is in a single paragraph. Compare to the accordion example below.

Accordion

Accordion Title Here

The first accordion is open by default. Other accordions can be expanded at a single time (meaning the other, already expanded one, is minimized automatically).

Accordion Title Here

Content Here

Accordion Title Here

Content Here

```
P
[accordion]

P
[accordion-item title="Accordion Title Here"]The first accordian is open by default. Other ac

P
[accordion-item title="Accordion Title Here"]Content Here[/accordion-item]

P
[accordion-item title="Accordion Title Here"]Content Here[/accordion-item]

P
[/accordion]
```

Notice above, that each piece of the Accordion code is in a single paragraph. This extra spacing can help make creating the wiki easier and has no impact on the way it renders.

When in doubt, add space If you ever notice areas are overlapping others or formatting oddly, it's usually resolved with additional space.

How-To: Wiki Configuration & Tips

Categorize

New categories can be created when necessary but should total less than 7.

Select Categories Associated with Wiki

[View](#)
[Edit](#)
[Manage display](#)
[Outline](#)

Title *

Wiki Creation & Help Ticket Best Practices

Node path: node/334569

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Title shown in blog header.

Category *

ecommerce

ecommerce-wiki

Tips and Tricks

Success Stories

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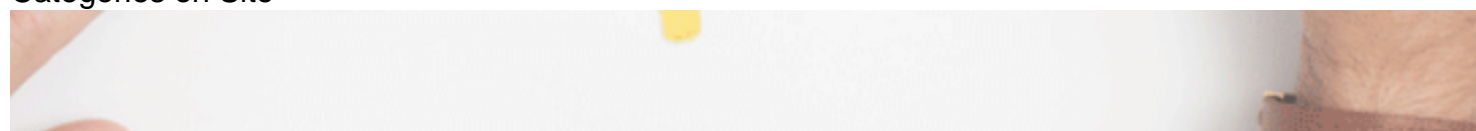
Committees

You can select multiple sub-categories but they must all belong to the same main

Summary *([Hide summary](#))

Checkout an overview of Program Enrollment, including how to navigat

Categories on Site



Categorized in: [Cvent](#) [Marketing Cloud](#) [Salesforce](#) [eComm Specialist Resources](#)

Need Help? Start Here.

November 4, 2019 by [jennifer.mortensen](#)

Click on the name of the tab below that matches the eComm category with which assistance:


Salesforce	Marketing Cloud	Cvent	eComm Specialists
------------	-----------------	-------	-------------------

Revisions

- Ever 'break' a page? Revert to an earlier version.*
 - *not available within forms.



Blog Article *Wiki Creation & Help Ticket Best Practices* has been updated.

 VIEW

 EDIT

MANAGE DISPLAY

OUTLINE

 REVISIONS

CLONE CONTENT

NODE EXPORT

 DEVEL

Categorized in: [Tips and Tricks](#)

Wiki Creation & Help Ticket Best Practices

 March 7, 2023 by [Melanie Jones](#)

Get Started, Then Grow

Design Standards

Technical Tips Wiki Creation

[View](#)[Edit](#)[Manage display](#)[Outline](#)[Revisions](#)

Revisions allow you to track differences between multiple versions of your content, and rev

REVISION

March 15, 2023 - 1:26pm by Melanie Jones

March 15, 2023 - 12:51pm by Melanie Jones

March 14, 2023 - 10:11pm by Melanie Jones

March 14, 2023 - 12:30pm by Melanie Jones

March 13, 2023 - 9:41am by Melanie Jones

Published vs. Unpublished

- If other team members need to review wikis while they are unpublished, melanie.jones@cu.edu ^[5] can get them access to do so.
- 'Preview' is not recommended. Save while unpublished to view instead.

URL redirects No redirects	<input checked="" type="checkbox"/> Published
Book outline Not in book	<input type="checkbox"/> Sticky at top of lists
URL path settings Automatic alias	<input type="checkbox"/> Promoted to CU.edu home page
Meta tags Using defaults	<input type="checkbox"/> Promoted to department's home page
XML sitemap Inclusion: Default (excluded) Priority: Default (0.5)	
Revision information New revision	
Comment settings Closed	
Printer, email and PDF versions	
Scheduling options Not scheduled	
Authoring information By Melanie Jones on 2023-03-07 17:29:30 -0700	
Publishing options Published	

Save

Preview

View changes

Delete

Training & Enablement Approach

Approach to Wikis & Content

- Wikis are Dynamic
- Leverage User Acceptance Testing (UAT) to test resources and find gaps. Let users know to provide feedback if something is incorrect or unclear.
- Record once (including a review of the wiki) & publish

Approach to Change

- Communicate impacts only
- Present resources at every opportunity
 - Help Ticket
 - Wiki Index / Need Help? Start Here.
 - Salesforce Chatter Groups

Approach to Help Ticket Adoption

Groups supported by UIS would benefit from a help ticket similar to eComm. The benefits are many but ultimately creates more timely and efficient responses::

- self-troubleshooting based on selection (fewer tickets created)
- notify one/many individuals based on the selection
- can create an Issue in Gitlab (or not)
- can have internal fields to track work (closed/owner/etc)
- can have conditional questions to get necessary information upfront for faster troubleshooting.

Folks are used to sending emails, so there will always be a learning curve. UIS employees need to be united in our approach. There are ways to encourage adoption:

1. Tell all users to use the help ticket. and highlight all the benefits.
2. When someone submits an email, complete the ticket and in the response mention "Can you please submit a ticket for things like this in the future".
3. It's not uncommon to need to remind folks of the correct process. If you recently did the above, write back, "Would you mind submitting this as a help ticket at: LINK". They will be more inclined to do so right now with their issue unresolved. Usually the next time, folks remember to use the ticket rather than email.
4. When someone continues to disregard the process, submitting issues on their behalf can help get the message across. I tell users "I can't do work without a ticket, so you can submit it or I can. But you doing it will get you a faster turnaround time."
5. 100% of users will never adopt this 100% of the time - and that is okay. The value is the 80% who want to do things correctly and adopt scalable and efficient processes.
6. Those who fail to follow processes will be worse off. Seize opportunities to highlight it. for them:
 - I had a user email me at 9 PM because they were going on vacation and needed to send an email, but there was an error message in Marketing Cloud. We were unable to connect before they left and the communication didn't go out until they returned. The error message screenshot with a solution was available on our help ticket, so they could have self-resolved in real time and got the message out on time. I let them know, and that individual stopped emailing after that.

- Get emails for requests that are not for you? Make sure your team has a response to say, "I'm not the right person, would you mind submitting a help ticket so it does get to the right people? Thanks!".
- Teach others to fish, do not fish for them. If someone calls you to say "How do I do A/B testing', do walk them through it or just send the link. Show them where to find this resource (Help ticket >> Marketing Cloud >> A/B Testing). "Good question, would you mind sharing your screen. I shared our help ticket link with you. First let's bookmark it and then I'll show you where the A/B wiki is."

Mantras

- Create a resource for every question, because it will come up again.
- Create a ticket for every question.
- Do not let perfection hinder progress.
- Explain it simply.

What to Avoid

- **A 'one and done' approach. User enablement is about constant nurturing.**
 - A single training or meeting isn't enough. Scale by hosting it once and making the recording available. This allows everyone to get the same education on-demand and opens the door for meeting time to be refocused toward deeper conversations or questions.
 - Inaccessible resources create an unnecessary barrier and make users dependent on non-scalable support. Do not send the resource directly to the user during training via email. Instead, show them how to access the resources for themselves for true empowerment.
- **Not documenting due to fear of demand**
 - Instead, document and be transparent. If you will not provide a feature or know it takes 8 months to complete, say it. This is more likely to mitigate questions than create them. If it does create demand, there is an opportunity for adding it to the roadmap.
- **Siloed / Fragmented/ No feedback loop?**
- **Not adhering to processes** (like helping a user when they did not follow the standard protocol of submitting a ticket)
 - We are all an integral part of managing change, and being united in our communications and approach is the most efficient path for adoption. Fragmented approaches create a cycle of "one step forward, three steps back".

Related Wikis

- [eComm Notifications \(Chatter\)](#) ^[6]
- [Rolling out Chatter in Salesforce \(for Admins\)](#) ^[7]

Display Title:

Wiki Creation & Help Ticket Best Practices

Send email when Published:

No

Source URL:<https://www.cu.edu/blog/ecommerce/wiki/wiki-creation-help-ticket-best-practices>

Links

[1] <https://www.cu.edu/blog/ecommerce/wiki/wiki-creation-help-ticket-best-practices>

[2] <https://www.cu.edu/blog/ecommerce/wiki/author/39>

[3] [https://venngage.com/blog/infographics-](https://venngage.com/blog/infographics-maker?utm_source=google&utm_medium=cpc&utm_campaign=&utm_content=&utm_term=venngage)

[maker?utm_source=google&utm_medium=cpc&utm_campaign=&utm_content=&utm_term=venngage](https://venngage.com/blog/infographics-maker?utm_source=google&utm_medium=cpc&utm_campaign=&utm_content=&utm_term=venngage)
[b9P737DVGxvd6hUwnM88o5My-wauA63d3YRjmhGuwfkzEkoDzUaAqfvEALw_wcB](https://venngage.com/blog/infographics-maker?utm_source=google&utm_medium=cpc&utm_campaign=&utm_content=&utm_term=venngage)

[4] <https://www.cu.edu/node/%23> [5] <mailto:melanie.jones@cu.edu> [6] [https://www.cu.edu/blog/ecommerce-](https://www.cu.edu/blog/ecommerce/wiki/ecommerce-notifications)
[wiki/ecommerce-notifications](https://www.cu.edu/blog/ecommerce/wiki/ecommerce-notifications) [7] <https://www.cu.edu/blog/ecommerce/wiki/rollout-chatter-salesforce>