McKesson Support Knowledge Base

Access, Use and Effectiveness

Steve DiMillo
Sr PM, Knowledge Strategy
Clinicals Solutions Support
Share what we have learned by capturing knowledge for future reference.

Save customer time and effort through effective re-use of captured knowledge.

Increase McKesson responsiveness by finding solutions to existing problems faster.

Improve service/support quality and consistency.

Work smarter, not harder.

Re-use knowledge to drive business effectiveness and efficiencies.
Introduction to McKesson Support KM
Knova-based Knowledge Management

Goal: To enable value-added re-use of McKesson Support knowledge

- A comprehensive KNOVA-based search tool using Natural Language Search and taxonomy concepts to enable flexible, capable access to McKesson knowledge

- Indexes MULTIPLE content sources, leveraging product technical content on searches within existing entitlement models. Currently three basic types of knowledge articles (aka Solutions) are configured in the system although there are variances within and between product teams.
  - **Issue Solution**
    - Describes a technical issue and a resolution, workaround or required next step
  - **How To**
    - Step-By-Step instructions on resolving questions or getting further support.
  - **General Information**
    - Content not related to a technical product issue or How-To details. Release information, contact information, other support resources fall into this Solution type.

Our KM system currently has over 80K indexed documents accessible internally with 20K accessible for customers via the Knova portal.
Accessing the KnowledgeBase
Portal Login

Access via the customer portal at https://customerportal.mckesson.com/

1. Customers/Partners must log in to the McKesson Customer Portal to access ICSS KnowledgeBase.

Once logged access to content is based on account-related permissions as per McKesson standards.

Note: McKesson employees can also use this tool to simulate the customer search experience.
Accessing the KnowledgeBase

Path to KB Access

2. Click on **Submit and Manage Service Orders** to access **ICSS** (Internet Customer Self-Service) page

3. Click on **Knowledge Base Search** to access the Knova system.

Knova-specific training information on access, use and search effectiveness is accessible via the **Knowledge Training** link.
Using the KnowledgeBase

Search Window Structure

Search string window. Up to 255 characters.

What’s New provides links to new or recently added content based on your product profile.

My Favorites allows quick access to selected Saved Documents and Saved Searches for later re-use.

Select a product to limit search scope. Available product list is based on your support contract entitlements.

Advanced Search enables access to more granular search options.

Most Popular provides links to frequently accessed or highly rated content based on your product profile.
Advanced Search provides a more complex search option with document, author and date parameters.

**Search In** enables scope of search string to apply to **Whole Document, Title Only** or **Document ID**.

**Author** name can be entered to limit content display to a single individual. Partial strings are permitted here e.g. *Jim* will return all documents authored by anyone with “Jim” in the author name.

**Published** date can be used to limit the date range of the desired content.

**Show Focus Choices** enables drill down into results sets by categories of:
- **Activity** Actions or Verbs (installing, messaging, etc)
- **Symptoms** Errors, Issues, Problems
- **Objects** Content types

Select one or more **Products** (via CTRL+click) to limit search scope. Available product list is based on your support contracts entitlements.
Introduction to McKesson Support KM

Basic Search Flow

Query string & parameters parsed to identify Knowledge Dictionary Concepts

Knova then searches for documents tagged with those Concepts

The search is constrained to documents tagged with those concepts

Key words are used to “rank” search results

Search results are “ordered” according to the frequency and proximity of query terms found in each document

* variations of the basic search may occur
Enter a search phrase. Be as descriptive as possible. Unless searching for a specific document, it's a good practice to structure the search with a `<problem>` and a `<symptom>`. Ex. F4 key entry generating AUD0107 messages.

**Search Results** count. Up to 10K documents are returned but only the 300 closest matches are displayed in search results. The full 10K set is accessible though further drill-down searches.

**Sort By** option enables views of the results by the following options:
- Author (Alphabetical)
- Create Date (Most Recent)
- Document Rating (highest first)
- Most Relevant (closest match)
- Publish Date (Most recent)

**Search Within** executes a secondary text search on the results list to aid in drilling down to a specific document.

**Change Focus** enables selection of content subsets based on Activity, Object and Symptom categories.
Using the KnowledgeBase

Viewing Content

Unable to update the Master Configuration screen in SP3 and SP4

Products
Horizon Meds Manager

Description
Unable to update the Master Configuration screen after a SP3 or SP4 upgrade or Prod to Test copy.
The Master Configuration screen is located under System maint | Configuration Ctrl.
Contact support for assistance in correcting this issue.

Attachments
Fix for SP3 invalid UpdateMasterConfiguration stored proc.rtf
fixUpdateMasterConfiguration.txt

Last Modified Date: 12-29-2010 ID: 10086

Support teams and products may have individual templates that vary the field entries within the content. Some template features include:

- Product Listing
- Links
- Attachments
- About

- One or more applicable products
- Included link to other articles or web pages
- Access to supplementary documents
- Details on published date, author, view count, template name, etc.

The average rating for the document and the rating count are displayed.

Turn Highlight On
Bookmark
Add to Favorites
Email Document
Back to Results

- Search terms shown in Yellow (inoperable)
- Add to Browser Favorites list
- Adds doc to My Favorites Knova window
- Email link to document
- Back to the previous search results set
Rating documents for their accuracy and usefulness drives their relative ranking within the search results. Click on a star level to reflect the overall value of the document.

<table>
<thead>
<tr>
<th>Stars</th>
<th>Level Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Not applicable to my search and/or not at all accurate</td>
</tr>
<tr>
<td>2</td>
<td>Somewhat applicable to my search and somewhat accurate</td>
</tr>
<tr>
<td>3</td>
<td>Applicable to my search but needs significant updates</td>
</tr>
<tr>
<td>4</td>
<td>Very applicable to my search and accurate with only minor updates needed</td>
</tr>
<tr>
<td>5</td>
<td>Perfectly addresses my needs and 100% correct.</td>
</tr>
</tbody>
</table>
Using the KnowledgeBase

Managing Favorites

My Favorites button allows quick access to selected Saved Documents for later re-use.

The label associated with the favorite can be defined for easy access in later Knova sessions.

The My Favorites pagelet in the search window will update to show the newest entry.

The Edit icon brings up a window for the management of the favorites list. Entries can be re-named or deleted from the list in this window.
Successful Search Criteria

**Important!!**

**Most successful search queries contain:**

- A subject and a predicate, adjective, and/or verb
- A product name and a description of the problem with the product
- A specific resource or reference to answer product related questions

**Successful search query examples:**

- F4 Key Entry generating AUD0107 messages
- Horizon Lab Release Notes 8.0
- Services Edge Router “Release 6” Release Notes

**Unsuccessful queries usually:**

- Contain just one or two common words/strings
- Use strings that inappropriately exclude or include content
- Overuse quotes around strings that force exact matches and exclude term matches defined in data dictionary.

**Unsuccessful search query examples:**

- Err
- Code offset at BUSCRI.AQ08+#8CA6
- “F4 Key Entry generating AUD0107 messages”

**TIPS:**

> Do not simply type one word or a product name for the search criteria as that will cause each document that contains that word or product will become relevant and be returned in the search results.

> By default, the search engine returns a maximum of 10000 documents and displays the best 300; this may be an indication that the query is not specific enough. Revise your query for a more relevant and refined set of results.

> A blank search string accompanied by particular product, template or group search parameter selections will return all content matching those parameter selections.
Advanced Search Operators allow more control over search behavior by ignoring concept constraints and enabling acceptance of unique or rare content strings. This provides the ability to force a word to be an exact match within a search string or set up a search for either of two similar terms. Parentheses are not supported to group these operators and special characters i.e. non-alphanumeric (!@#$%_{}, etc.) are ignored (replaced with a space)

**Search operators:**

```
“”  match phrase exactly without stemming (stems are the “s”, “ed” or “ing” on the ends of words)
+
exact word after operator will be used as constraint
--
exact word after operator cannot be contained in any docs
-
ignored unless preceding a number (i.e. negative sign)
OR
one of the words on each side of the operator need to be in the doc
*
support for wildcards where the * character is contained after the other characters in the query term
```

**Examples:**

- `xyz` returns docs containing *xyz*; foo-bar returns *foo bar, foobar, foo*, and *bar*
- `--xyz` will exclude any documents containing *xyz* from the search results
- `CS1000 OR CS2000` will return documents containing the first word on either side of the OR
- `80%` will ignore the % sign; `$450` will ignore the dollar sign
- `40,000` will be interpreted as *40000* (return docs with *40000* &/or *40,000*)
- "install" or `install` will find documents with *install* as well as *installation, installing*, etc.
- Special characters are ignored (replaced with a space); special characters are non-alphanumeric e.g. the underscore (_) character
## What to Do When…

<table>
<thead>
<tr>
<th>Results</th>
<th>Suggested Action</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Too many (e.g. 300) hits                                               | a. Use **Search Within** to increase search specifics  
b. Expand search string to be more detailed (*problem + symptom*)  
c. Use **Advanced Search** options to select one or more Products, a published date range or an author name. | Although the best only 300 hits are displayed the drill-down search options are executed on the entire set of visible and hidden search results. |
| Zero hits returned but I know the document does (or should) exist.     | a. Usually a result of overly specific search terms. i.e. ADEPTLG9 or BUSRCI.AA08. Use wildcards to expand initial search scope i.e. ADEPTLG*  
b. Avoid using quotes around terms as this forces **exact** matches.  
c. Ask your support team to check the status of the document i.e. published vs draft, indexed into Knova, internal only, etc. | Keep in mind that your search may also be an example of a situation where there simply is no content applicable to the search string entered. |
| Results not applicable to my product or search string                  | a. Re-execute search with a product selected from the **Product** pull-down menu  
b. Be aware that the term dictionary may be matching your term with a system equivalent. You support team can request updates to the term dictionary to improve search results.  
c. Select a subset category from within the **Focus Your Results** sub-menu. | Product selection entries are also searched within content rather than just as a document attribute. i.e. a Physician Portal document with AdminRx somewhere in the text may show up in AdminRx searches.product searches. |
| My Product list is incorrect or incomplete                             | a. The Guided Search capability allows only one product to be selected. Use the Advanced Search capability to select multiple products for your search (Ctrl+click)  
b. The displayed product list is based on the products defined in the support contract. Contact the Portal Support Team at 866-699-5366 M-F 8AM-8PM for questions or support related to the product set. | Be aware that as McKesson’s products evolves so will their naming and/or categorization within the system so product terms within the application will evolve on a similar path. |
For general questions or concerns

Review the KM training information accessible via ICSS:

OR

Open a ticket with our Customer Portal Support Team for issues with portal, ICSS, Download Central or Knova KM functionality or access issues.

The Customer Portal Support Team services customer and internal McKesson users Monday-Friday 8am-8pm ET. They can be reached at 866-699-5366.
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