



Qexchange – modules and features

Qexchange is an online environment for knowledge exchange, collaboration, expertise sharing and performance support. It is designed to improve decision-making, speed workflow and promote effective inter- and intra-departmental collaboration.

Qexchange is modular

A suite of complementary modules allows *Qexchange* customers the flexibility to configure and grow their knowledge exchange environment in a way that best meets their business goals and priorities.

Qexchange Core Module features...

Qexchange offers a full suite of knowledge exchange features; configurable in a variety of ways.

Every Qexchange system starts with the core module which includes a searchable knowledgebase. Knowledgebase content can include any type of digital file, web or email address. Content is populated using simple, self-service publishing and approval wizards. The knowledge structure can include any number of client defined categorizing schemes.

- **Knowledgebase.** Qexchange collects, stores, organizes and distributes an organization's knowledge. The system can be configured as an open knowledge exchange, where all users can contribute to the knowledgebase, or as a facilitated knowledge exchange, where designated users handle content publishing. If all users can contribute, then managing editors are designated to review and approve content before it is made generally available. This open publishing model enables knowledge exchange between people and functions throughout the organization.
- **Self-Service Publishing.** Qexchange provides all the tools needed to populate and manage the knowledgebase. Content is added and updated quickly with easy-to-use wizards. Approvers are notified immediately, via email, when new items are submitted.
- **Basic & Advanced Search.** Users can search the knowledgebase for relevant items. The search feature scans deep into the contents of pdf, doc, xls, ppt, html and many other digital file types. Advanced search allows searches to be filtered by date range and category, keeps track of each user's last 10 searches, and enables users to save commonly used searches.
- **Configurable Knowledge Structure** A flexible, client defined organizing structure enables users to browse the knowledgebase by any number of categories which can be used as menus, and/or to sort and filter lists.
- **User Account Management.** Qexchange includes tools for creating and updating user accounts, profiles and personal preferences.

Qexchange Expansion Modules

Qexchange is modular and configurable. In addition to the core features, advanced feature options are available. A wide variety of expansion modules are available for *Qexchange* so you can enhance and grow your knowledge exchange to meet the changing needs of your organization.



Exchange with Peers

User Affinities

Problem:

Is anyone out there? Is anyone else looking for answers to the same questions? How can you find out who is doing similar work, and what they have contributed or found useful in the knowledgebase?

Qexchange Solution:

The **User Affinities** module offers value-added features to enhance the overall user experience and generate dialog that positively impacts the quality of the knowledgebase.

Affinity items require absolutely no maintenance. They are self-organizing, and always changing.

Email To A Friend

Recommend items you find in the knowledgebase to colleagues.

People Who Used This Item Also Used...

See related items based on your affinity with others who use the knowledgebase.

People Who Use the Same Items I Use...

Network with people who use similar content, and therefore, may be working on similar issues.

People Who Use Items I Contribute...

Establish a dialog with the people who provide content you find most useful.

People Who Contribute Items I Use...

Establish a dialog with the people who find your content most useful. Find out more about how they are using your content and how well it is meeting their needs.

User Communities

Problem:

How do you distribute sensitive information to a select group of people, such as financial reports to executives, or competitor intelligence to analysts? What networking opportunities do you offer to people with similar professional interests who work in different organizations, locations or functional areas?

Qexchange Solution:

The **User Communities** module enables your organization to operate all the private knowledge exchanges it needs. Support any number of special communities, project teams, practitioner networks, special interest groups and task forces.

Features include threaded discussion, document sharing, open or private membership rules and much more.

My Communities

Users can form communities where they can share information, distribute and comment on draft documents, plan events, discuss topics and collaborate to produce team outputs.

Membership Options

Before deciding to join, a user can visit a community as a guest. Community membership can be open, where anyone can join; or private, requiring an invitation. Sensitive communities can be made even more private by requiring an extra password for entry.

Community Leader Tools

Administrative controls and wizards make it easy to create and configure a community, invite new members, monitor member participation, facilitate discussions and more.

User Ratings & Reviews

Problem:

How can you assure that the content in your knowledgebase is valued? How can you influence contributors to keep their content accurate, current, and on target?

Qexchange Solution:

The **User Ratings & Reviews** module provides fast, convenient ways for users to provide feedback on the knowledgebase items they use.

Content owners have special tools to monitor user ratings and reviews of their content. Since user ratings and reviews are visible to all users, it is in a content owner's best interest to continuously improve content based on user feedback.

User Ratings

Users can rate any item in the knowledgebase. Average rating and total number of raters is available for all to see. Knowledgebase contributors easily identify and improve poorly rated items that are requested a lot.

User & Editor Reviews

Users can write reviews, long or short, of any item in the knowledgebase. Reviews are available for all to read. Official reviews can be posted by editors.

Top-Rated Reviewers

Users can indicate whether or not they find a particular review helpful. The reviews of the most top-rated reviewers appear at the top of the list.



Exchange with Experts

Expert's Library

Problem:

Who are the experts in your organization? Experts may be out there, and willing to provide guidance and information to help you avoid costly mistakes and rework. But where are they, and what do they know?

Qexchange Solution:

The **Expert's Library** module leverages the advanced knowledge of experts throughout your organization. Provide the recognized experts within your

organization a convenient, non-invasive method of sharing their advanced knowledge and insight with others.

Involve Experts

Invite recognized experts in your organization to contribute to a special section of the knowledgebase, a library of content that is populated exclusively by experts.

Capture and Distribute Expertise

The Expert's Library can be organized by areas of expertise which are critical to the success of your organization. As experts populate the library and others access the content, the expertise in your organization is mined and leveraged.

Expert Contributors

Experts contribute to the library using simple publishing wizards. Experts can contribute articles, white papers, links to professional associations, events, resource recommendations and other guidance. Expert contributors can monitor the amount of use their content gets, and review feedback from users.

Task Guidance & Support

Problem:

How do you operationalize best practices? How do you achieve consistency and accuracy? How can you organize knowledge in the context of work functions and processes?

Qexchange Solution:

The **Task Guidance & Support** module provides a performance-centered window into the knowledgebase. Critical job procedures, tasks and protocols are defined for people in key job functions. The most salient information, tools and resources can be found at the moment of need to accomplish the task at hand.

Critical Job Functions

Task Guidance & Support is role-based. It enables you to identify the job roles and functions most critical to the success of your organization, and customize access to the knowledgebase for those audiences. Users have access to relevant task guidance and support based on their user profile.

Work Procedures & Tasks

Functional experts and/or performance analysts configure the system to reflect the specific work procedures and tasks performed by a given role. Users can get on-the-job guidance along with real-time access to the information, tools and resources needed to accomplish the task at hand.

Performance Support Tools, Information & Resources

Job tasks and knowledgebase content are maintained either in a tightly managed, or loose, self-organizing way, depending on your organization's requirements. Easy-to-use controls and wizards enable functional experts to keep the task guidance & supporting content relevant, accurate and strategically focused.



Exchange with Organizations

Spotlights

Problem:

How does your organization communicate important, but constantly changing, information such as events, progress towards financial goals, or other time-critical content?

Qexchange Solution:

The **Spotlights** module offers a convenient sidebar where the people in your organization can find news flashes, hot topics, announcements and more.

Announcements

Announce recent organizational awards and citations, news, targets that were met, outstanding achievements and other key items of interest.

Quick Links to Frequently Used Items

Provide quick, convenient links to items in your knowledgebase that are frequently accessed.

Spotlight Authoring Tools

Easy-to-use tools enable an administrator to create Spotlights. Your knowledge exchange can have a single, global spotlights sidebar or multiple spotlights, one for each tab or domain.

Suggestion Box

Problem:

What do users think? Some of the best ideas come from users in the field. But these ideas seldom make their way back to the systems or content owners who are in a position to respond. How can you tap into the great ideas that emerge from your user community?

Qexchange Solution:

The **Suggestion Box** module offers a forum for users to share their ideas and input.

Anyone can Suggest Anything, Anytime

Create any number of slots (or departments) in your suggestion box. Anyone can "drop" a suggestion at any time.

Identify Yourself for Follow-Up or Remain Anonymous

People can choose to offer suggestions anonymously, or identify themselves for follow-up.

Suggestion Reviewer Tools & Triggers

Suggestion Box stewards receive email notifying them of new suggestions. Easy-to-use wizards enable them to review suggestions and track their status through closure.



Personalized Experience

Alerts

Problem:

What happens when information you commonly use is changed? Or a tool you have downloaded is updated? How will you know?

Qexchange Solution:

The **Alerts** module offers a set of personalized alert features to notify people when items of interested are added or updated. Alerts can be "pulled" by users on a subscription basis, or "pushed" to specific audiences by content owners.

Alert Me When This Item is Updated

Find an interesting item? Want to be alerted when it changes? Just check "alert me when this item is updated".

Alert Me When Something New is Added

Choose an area of interest to be alerted when anything new is added. Elect to be notified when you visit Qexchange, or by email.

Alert People that I Have Updated This Item

When you update one of your contributions to the knowledgebase, you can select which people to alert: those who have asked to be alerted, anyone who has rated or reviewed the item, or anyone who has retrieved the item.

Recent Selections

Problem:

Have you ever found something on the Web, and then lost it again?

Qexchange Solution:

The **Recent Selections** module keep track of your last three selections. It is updated in real-time, requires no maintenance and is personalized for each user.

My Recent Selections

Always list the last three items you selected from the knowledgebase so you can link back to them, quickly if needed.

Role-based Views

Problem:

Are you experiencing information overload? When you search for information, wouldn't it be nice if you could just get rid of all the items that are obviously irrelevant to you?

Qexchange Solution:

The **Role-based Views** module ensures that the right people have access to the right knowledge, based on their user profile. For example, content that is important to engineers may not be useful to financial professionals. By associating content with the appropriate user groups, users can find what they need more easily.

User Groups

Define user groups by job title, site, region or anything. Each user selects relevant user groups and can change selections at any time to see a different view of the knowledgebase. If needed, any user group can be set as a required field in the user profile; meaning that all users must make a selection. User groups are client configurable. You can have as many or as

few as needed. User groups are generally defined during initial implementation, but can be added, removed or changed at any time.

Domains

Define knowledge domains relevant to each user group. A domain is like a self-contained knowledgebase. It holds a collection of content and has its own managing editors and administrators. Assigning a domain to a user group means that all the content in the domain is accessible to all the members of that group. Users can only see content in the domains that have been assigned to their group. A domain can be assigned to one, many or all user groups. A user group can be assigned to one, many or all domains. Domains are client configurable. You can have as many or as few as needed. Domains are generally defined during initial implementation, but can be added, removed or changed at any time.

Knowledgebase Content

In many cases, clients need to provide role-based views at a more granular level. For example, all people in an organization or department may have access to a domain, but the content within the domain may need to vary based on a user's job function or location. To meet this need, any unique item in the Qexchange knowledgebase can be assigned to one or more specific user groups. If no user groups are assigned, the item is visible to all users. Content can be assigned to relevant user groups by the contributor (or content owner) at any time using simple, self-service wizards.



Continuous Improvement

Link Validity Management

Problem:

Tired of wasting precious time tracking down information only to end up at a broken link? Web content may be moved or renamed at any time. How can you keep track of all the links in your knowledgebase to external content?

Qexchange Solution:

The **Link Validity Management** module assures the items in your knowledgebase are always readily accessible.

Broken Link Detection

The system can be scheduled to scan the entire knowledgebase periodically for broken links. When a broken link is found, it is rechecked multiple times over several hours. Items that remain broken are temporarily removed from circulation.

Contributor Notification

A broken link is reported immediately to its contributor and a designated administrator via email. Contributors can view a list of broken link items and their status.

Resolution Wizards

Contributors use online wizards to confirm and resolve broken links, getting critical content back into action quickly and easily.

Shelf Life Management

Problem:

What happens when items in the knowledgebase become outdated? Out of date

information takes up space, adds to information overload, and may lead to costly errors when relied upon by users. Who is accountable for removing outdated items?

Qexchange Solution:

The **Shelf Life Management** module offers tools to help keep the knowledgebase current and accurate.

Items Due to Expire

Knowledgebase contributors can set an expiration date for each item. The system can be scheduled to scan the entire knowledgebase periodically for items that are due to expire.

Contributor Notification

Contributors receive email reminding them to attend to items that are approaching expiration. A designated administrator is notified as well. Contributors can view a list of items due to expire, and their status.

Resolution Wizards

Contributors can use online wizards to update or archive an item, or extend its shelf life, quickly and easily. Contributors who do not take action receive a second email notice after the expiration date has passed notifying them that their expired items have been automatically removed from circulation. If needed, a contributor can always update the item and return it to action.

Tracking & Reporting

Problem:

What content is most valuable to your organization? What is being used? Who is using it, and how often?

Qexchange Solution:

The **Tracking & Reporting** module provides real-time data on the knowledgebase and its users.

Reports can be used to monitor knowledge exchange activity and find opportunities to increase its value to your organization.

Content Reports

Content retrievals and contributions are tracked and reported by user group, knowledge category, and/or time span.

User Reports

User visits, retrievals and contributions are tracked and reported by user group, knowledge category, and/or time span.

Reports Control Panel

Enter a start and end date and select the activity you want to see. Filter results by user group, knowledge domain and/or category.

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