

10. Knowledge base | Work'N'Roll

10.1 How to add a document to a knowledge base

10.1 How to add a document to a knowledge base [🔗](#)

10.1.1 On the homepage, select the Knowledge Base section

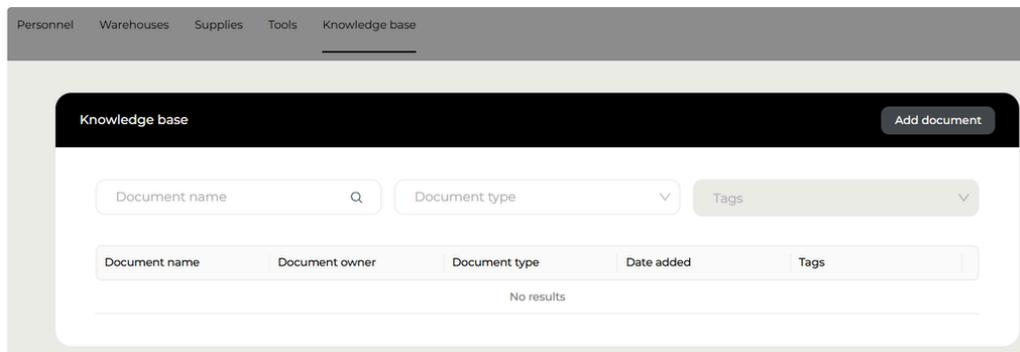


Figure 10.1 - Knowledge base

10.1.2 Click Add Document

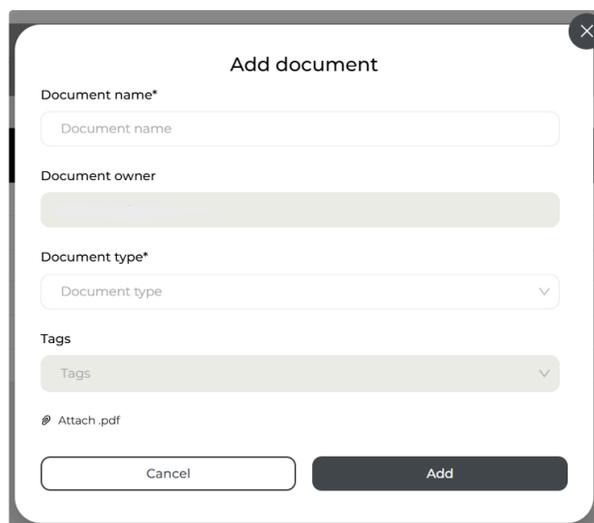
The screenshot shows a modal window titled 'Add document'. It contains several form fields: 'Document name*' (required, with an asterisk), 'Document owner', 'Document type*' (required, with an asterisk), and 'Tags'. Below these fields is an 'Attach .pdf' option with a document icon. At the bottom of the modal are two buttons: 'Cancel' and 'Add'. The modal has a close button (X) in the top right corner.

Figure 10.2 - Adding a document

10.1.3 Enter the name of the document (required field)

10.1.4 Document Owner and Tags will be added automatically

10.1.5 Select Document Type from the drop-down list

10.1.6 Click Attach Document required

10.1.7 Select the required document in .pdf format

10.1.8 Click Add

10.1.9 Search for the document by name, type and tags

10.1.10 Click on the icon with three dots

NOTE.

You will see a drop-down list with a list of actions

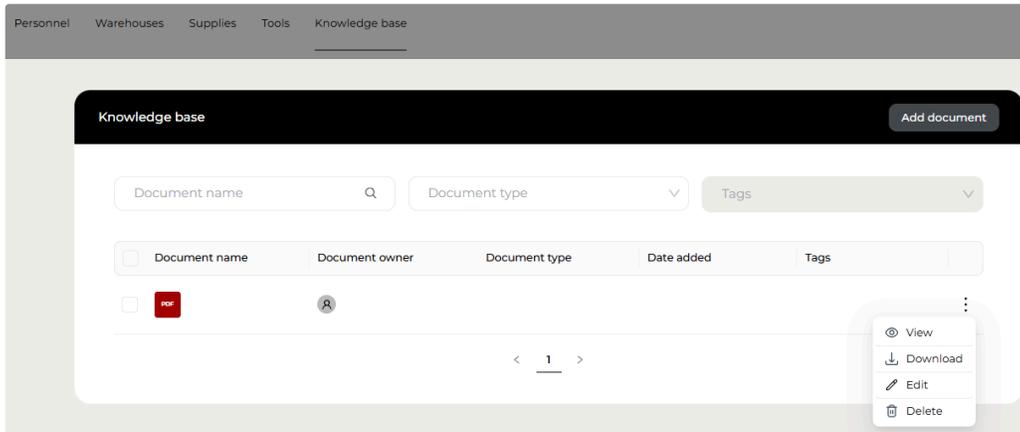


Figure 10.3 - Document management

10.1.9 From the dropdown list, select View

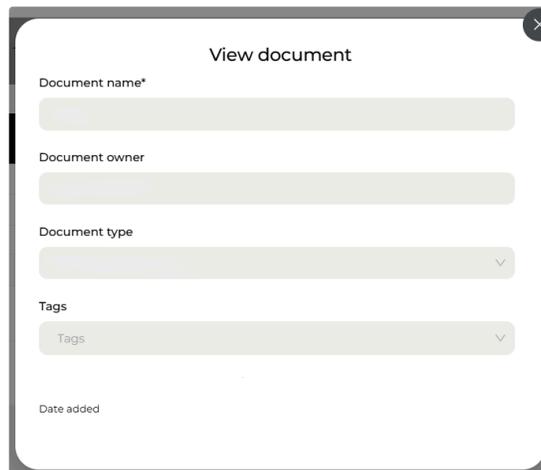


Figure 10.4 - Viewing a document

10.1.12 In the opened View document window familiarize yourself with the information about the document: name, type, owner of the document

10.1.13 Select Download from the drop-down list

10.1.14 Download the required document

10.1.15 Select Edit from the drop-down list

10.1.16 Edit the required document

10.1.17 Select Delete from the drop-down list

10.1.18 Delete the required document