

# **Guidelines on uploading a document/knowledge piece over a Knowledge Repository on KM Portal**

The following guidelines may be referred by a user of the KM Portal, while uploading a document/ knowledge piece over a Knowledge Repository:

- Ensure that the content has relevance to the Knowledge Repository over which the document is being uploaded.
  - In case the document does not relate to the Knowledge Repository, it may be shared over a 'Community' on the portal for the related theme, towards initiating discussion from its members.
- Ensure that the source and references are adequately mentioned in the document, in case any third party information/ extract from the work of some other author has been used.
  - If the content is an original piece of work (Thought Paper, analysis, opinion etc.) by the user, the same should be clearly highlighted at the top of the document. Also, the publication details (date of publication, name of Journal etc.) should be mentioned if this knowledge piece had got earlier published somewhere.
- Ensure that the document does not reveal any information which is confidential/ sensitive in nature.
- Ensure that the language/ tone used in the document is not derogatory and it does not intend to offend any particular group of people.
- Check the formatting of the document including font (type, size, color, style etc.), images (size, color, resolution etc.), tables (grids, alignment, color etc.), charts (type, color, scale etc.), margins, spacing etc.
- Ensure that there are no typos in the document.

While uploading a document/ knowledge piece in the Knowledge Repository, the user needs to click over 'Add Document' under the respective Knowledge Repository (screenshot provided in Annexure). Herein the following aspects need to be considered:

- Title of the document should be mentioned under the field 'Name'.
- Under the field 'Tags', the key words used in the document and the related themes/ topics should be mentioned, so that the document gets displayed while someone searches for knowledge pieces with those words.
- The file formats which are allowed to be uploaded in the Knowledge Repository are mentioned in the field 'File'. The portal will not allow any formats beyond these file types.

- The user should select from the drop-down list, the appropriate 'Document Category' e.g. Act, Best Practices, Framework Documents, Guideline, Handbook, Template etc. It will facilitate locating knowledge in the organization. In case a user does not find any of the categories mentioned in the list relevant for its document, 'Others' can be selected as 'Document Category' and the appropriate category can be specified in the text box which appears below this field.
- 'Issue Date' and 'Expiry Date' are non-mandatory fields and can be selected if the user needs to specify the period of validity for the document, based on the nature of the document.
- In case the user wants to edit some of the details related to the document at a later stage, it should click over 'Save'. All the details along with the attachment are saved in the KM portal and can be accessed through 'My Documents' section under the respective Knowledge Repository.
- Once the user clicks over 'Save and Submit for Review', the document is automatically sent to the designated reviewer for the respective Knowledge Repository. The status of the document is shown as 'Under Review' in 'My Documents' section under the respective Knowledge Repository.