



Knowledge Management

ADITO Software GmbH

From version xRM 2024.2.1 | August 2025





Screenshots

The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.





Agenda

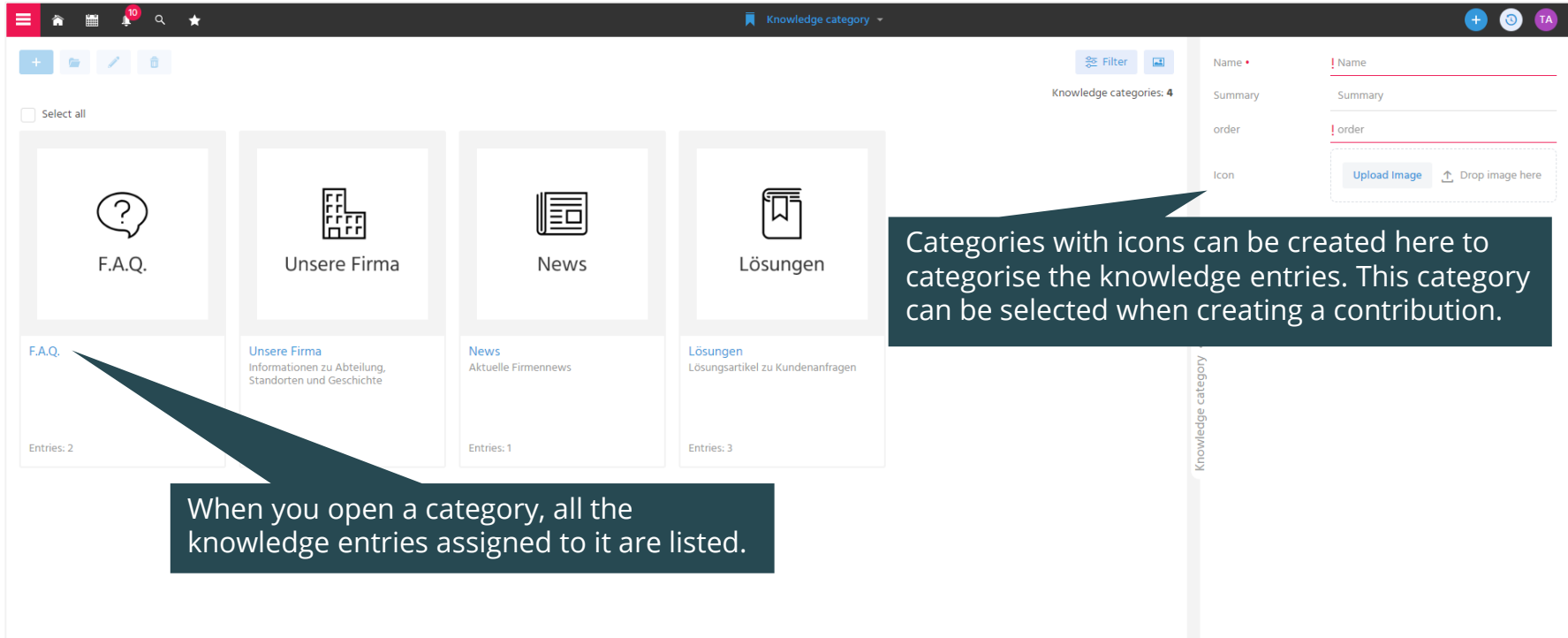
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Create
Knowledge
category

Knowledge category

Create new data records and overview



The screenshot shows the ADITO Knowledge category management interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header displays 'Knowledge category' with a dropdown arrow and user avatars. The left sidebar has a '+ Select all' checkbox. The main content area shows four knowledge categories as cards:

- F.A.Q.**: Icon of a question mark, description 'F.A.Q.', 'Entries: 2'.
- Unsere Firma**: Icon of a building, description 'Informationen zu Abteilung, Standorten und Geschichte'.
- News**: Icon of a newspaper, description 'Aktuelle Firmennews', 'Entries: 1'.
- Lösungen**: Icon of a book, description 'Lösungsartikel zu Kundenanfragen', 'Entries: 3'.

On the right, a form for creating a new category is visible, with fields for Name, Summary, order, and Icon. The 'Icon' field includes an 'Upload Image' button and a 'Drop image here' instruction.

Annotations:

- A callout box points to the 'F.A.Q.' category card, stating: "When you open a category, all the knowledge entries assigned to it are listed."
- A callout box points to the 'Icon' field in the form, stating: "Categories with icons can be created here to categorise the knowledge entries. This category can be selected when creating a contribution."

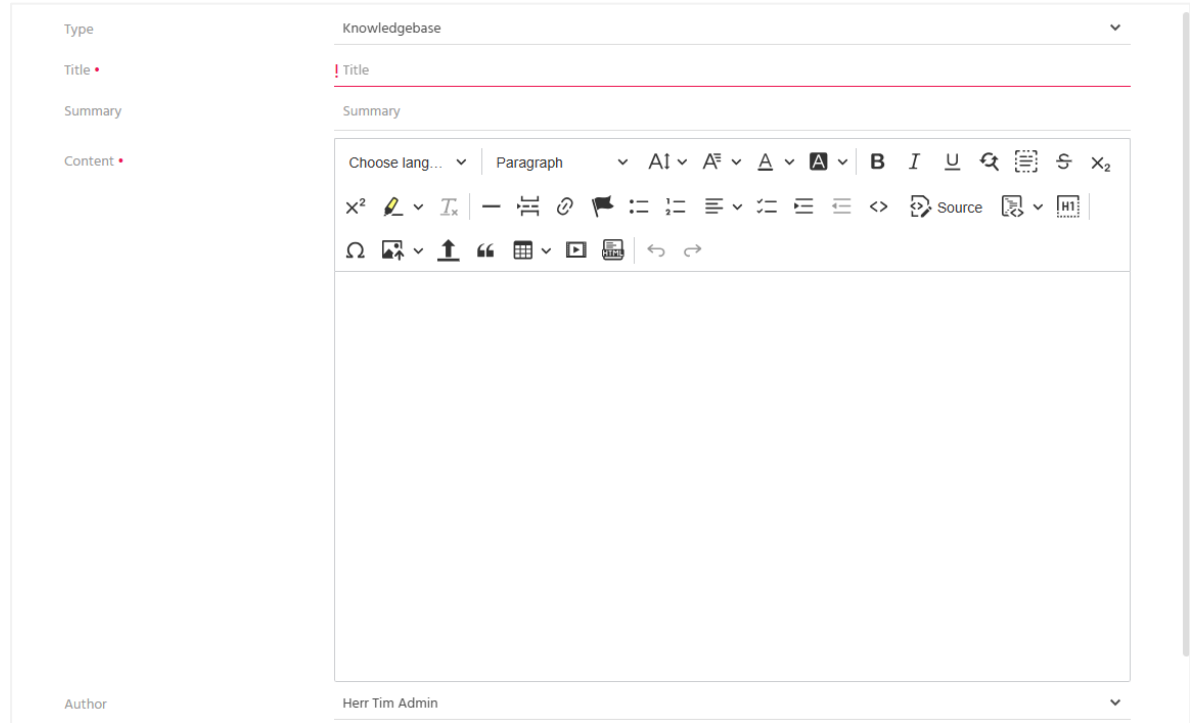


Create
Knowledge
entries

Knowledge entries

Type

- Knowledge entries of the **"Knowledgebase"** type can be used generally.
- The **"Solution"** type is used for the assignment to service tickets (see separate chapter).



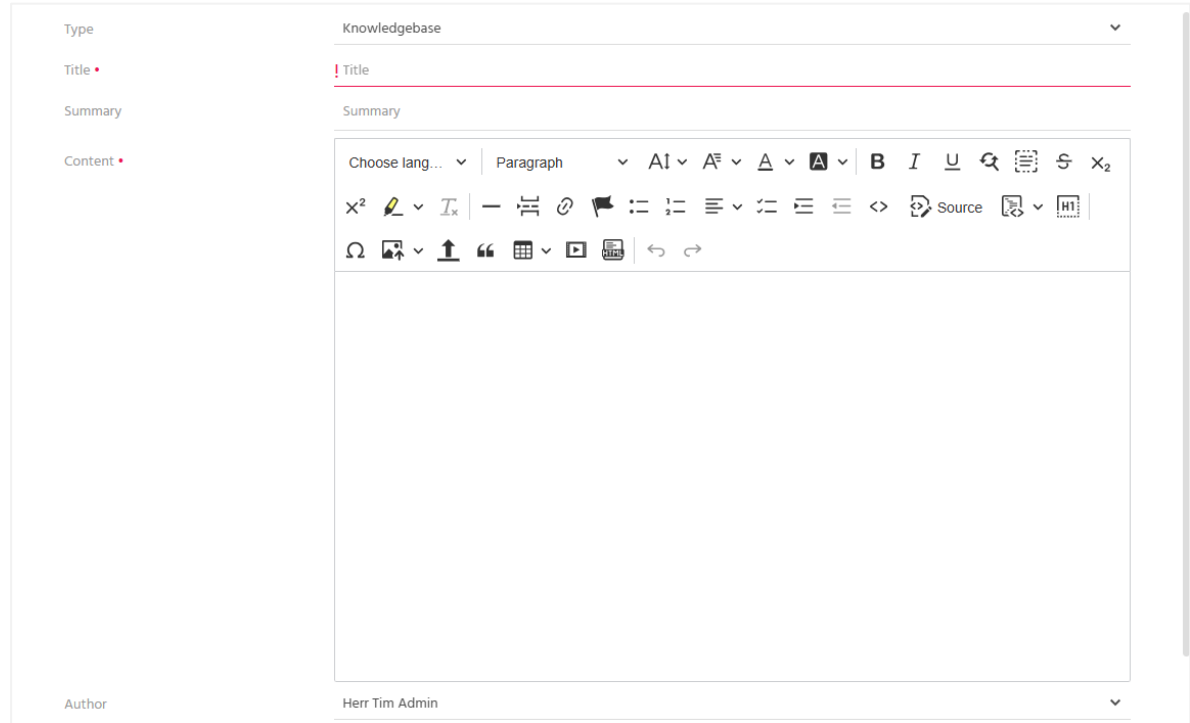
The screenshot displays the ADITO Knowledgebase entry form. On the left, a sidebar lists the form sections: Type, Title, Summary, and Content. The main area is titled 'Knowledgebase' and contains fields for 'Title' (with a red exclamation mark icon) and 'Summary'. Below these is a rich text editor for 'Content' with a toolbar featuring options like language selection, paragraph formatting, text color, background color, bold, italic, underline, link, unlink, source, and insert. The bottom of the form shows the 'Author' field with the value 'Herr Tim Admin'.

Knowledge entries

Title and summary

In addition to a **title**, a **summary** that briefly describes the content can be entered.

The summary is displayed as a separate area in the preview.



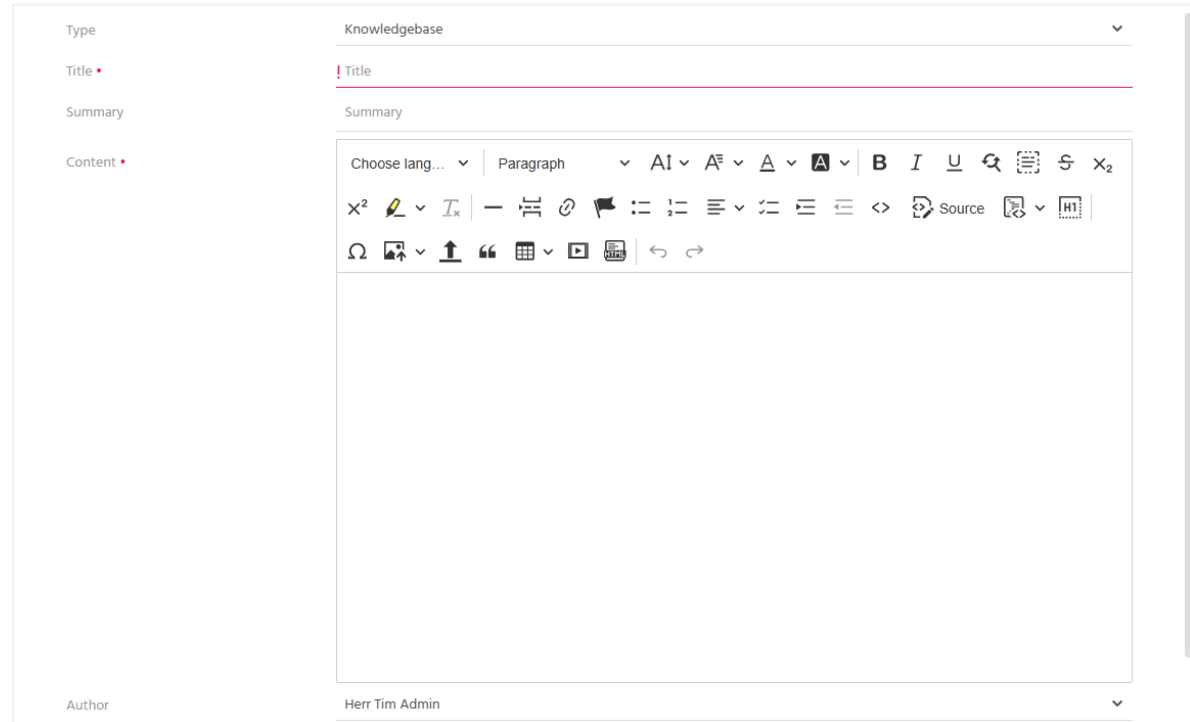
The screenshot shows the ADITO Knowledgebase entry form. On the left is a sidebar with labels: 'Type', 'Title •', 'Summary', and 'Content •'. The main area is titled 'Knowledgebase' and contains a 'Title' field with a red exclamation mark icon, a 'Summary' field, and a large 'Content' area with a rich text editor. The editor toolbar includes options for language, paragraph style, text color, background color, bold, italic, underline, link, unlink, source, and image. The 'Author' field at the bottom is filled with 'Herr Tim Admin'.

Knowledge entries

Create content using HTML editor

The **content** of a entry is formatted using an **HTML editor**.

The individual formatting options for text, images etc. are described in the separate documentation for the HTML editor.



The screenshot displays the ADITO Knowledgebase HTML editor interface. On the left, a sidebar contains a list of fields: 'Type' (set to 'Knowledgebase'), 'Title' (marked with a red dot), 'Summary', and 'Content' (marked with a red dot). The main editing area is divided into sections for 'Title', 'Summary', and 'Content'. The 'Content' section is active, showing a rich text editor with a comprehensive toolbar. The toolbar includes options for language selection, paragraph formatting, text alignment, font color, background color, bold, italic, underline, link, unlink, source code, and various insertion tools like tables, images, and videos. Below the toolbar is a large text area for content entry. At the bottom, the 'Author' field is populated with 'Herr Tim Admin'.

Knowledge entries

Author and Responsible

	Title ▾	Firstname ▾	Lastname ▾	Company ▾	
		Steffen	Abend	privat	
		Tim	Admin	meineFirma GmbH	
		Tasuku	Akiyama	Rixner und Rupp SE	
				nd Rupp SE	
				ruppe Matthias Bogen	
		Markus		Industrial Steel AG	
Author	Frau Isatou Jammeh				⬆
Responsible	Frau Isatou Jammeh				⬇
Category	Lösungen				⬇

An **author** and **person responsible** are assigned to each contribution.

As these knowledge entries can also be external sources, these fields can also be filled with contacts (who are not employees).

Knowledge entries



Publishing level

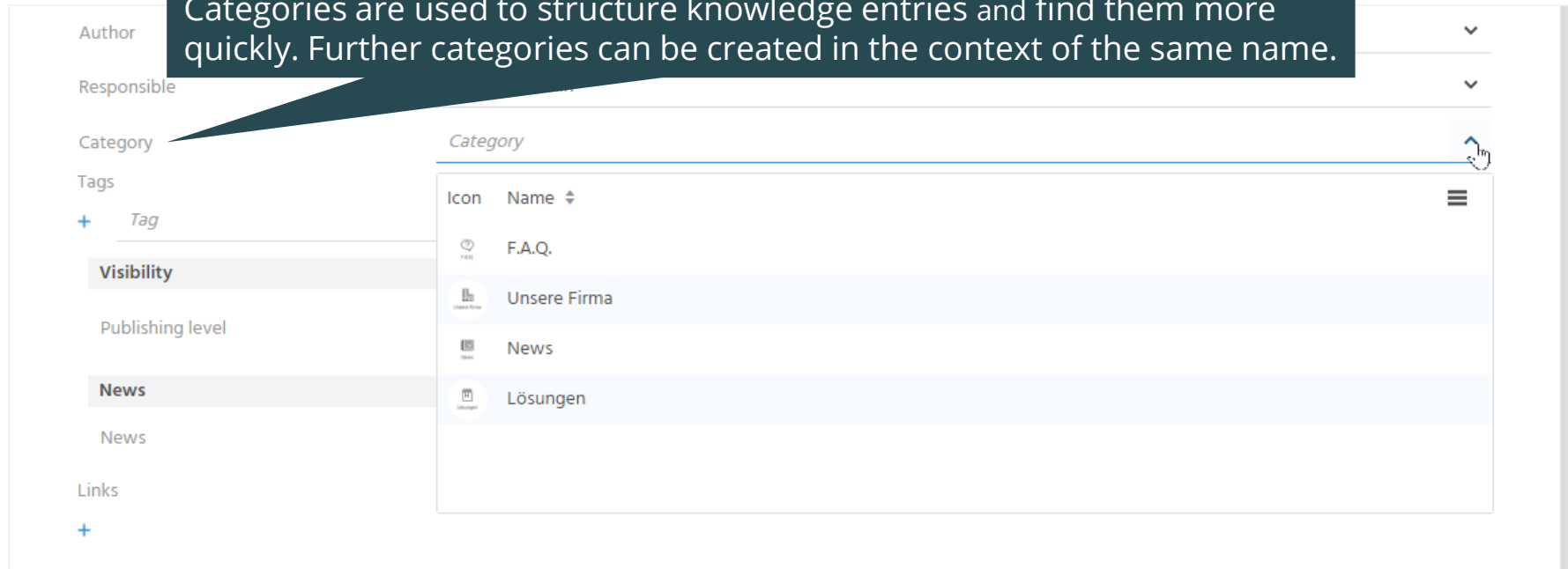
Author	Herr Tim Admin	▼
Responsible	Herr Tim Admin	▼
Category	Category	▼
Tags		
+ Tag		▼ -
Visibility		
Publishing level	Internal	^
News	Internal	
News	Partner	
Links	Public	
+ Document		



Knowledge entries

Category

Categories are used to structure knowledge entries and find them more quickly. Further categories can be created in the context of the same name.

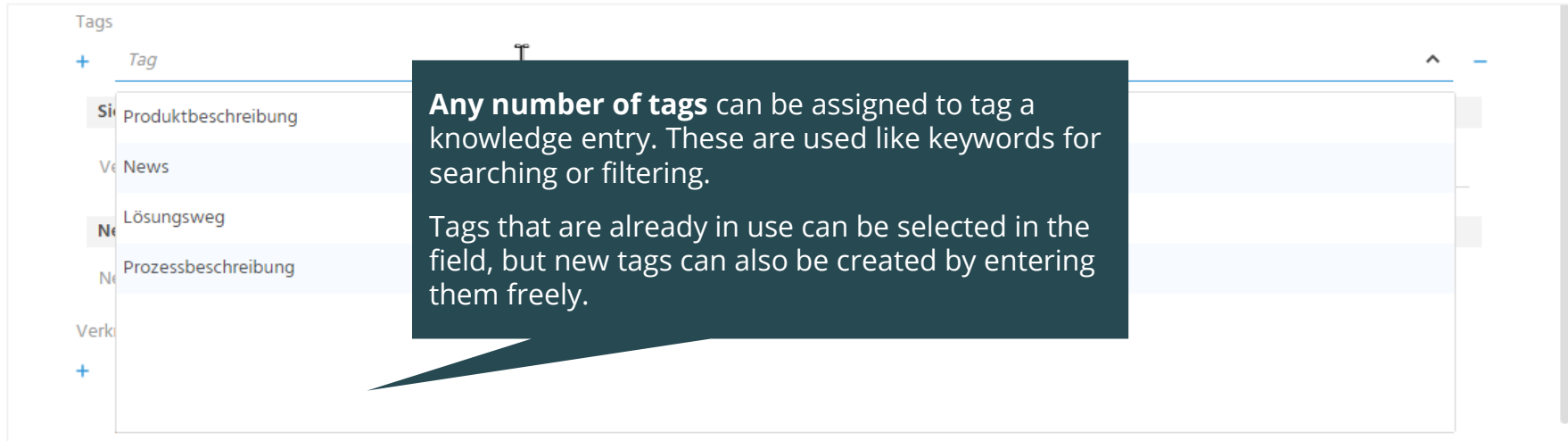


The screenshot shows the ADITO knowledge entry form. On the left is a sidebar with fields: Author, Responsible, Category, Tags, + Tag, Visibility, Publishing level, News, News, Links, and +. The 'Category' field is selected, and a dropdown menu is open. The dropdown menu has a title 'Category' and a list of categories: F.A.Q., Unsere Firma, News, and Lösungen. Each category has a small icon to its left. A hand cursor is pointing at the top right of the dropdown menu.

Icon	Name
	F.A.Q.
	Unsere Firma
	News
	Lösungen

Knowledge entries

Tags



Tags

+ Tag

- Si Produktbeschreibung
- Ve News
- Ne Lösungsweg
- Ne Prozessbeschreibung
- Verke

+

Any number of tags can be assigned to tag a knowledge entry. These are used like keywords for searching or filtering.

Tags that are already in use can be selected in the field, but new tags can also be created by entering them freely.



These tags are **not** displayed in the knowledge entry (preview or main view). They can only be viewed and edited in the edit view.

Please also note that the term “tag” is not used here for the function of individual tags or favourites.

Knowledge entries



Links

Tags

+ Campaign

+ Campaign Step

Vi Company

Pl Contact

Ne Contract

Ne Event

Links

+ ! Type

Product

! Dataset

Modul D

Knowledge entries that are entered for a specific customer or a specific product, for example, can be linked to the respective data record when they are created. The links can be found in a separate tab in the main view.

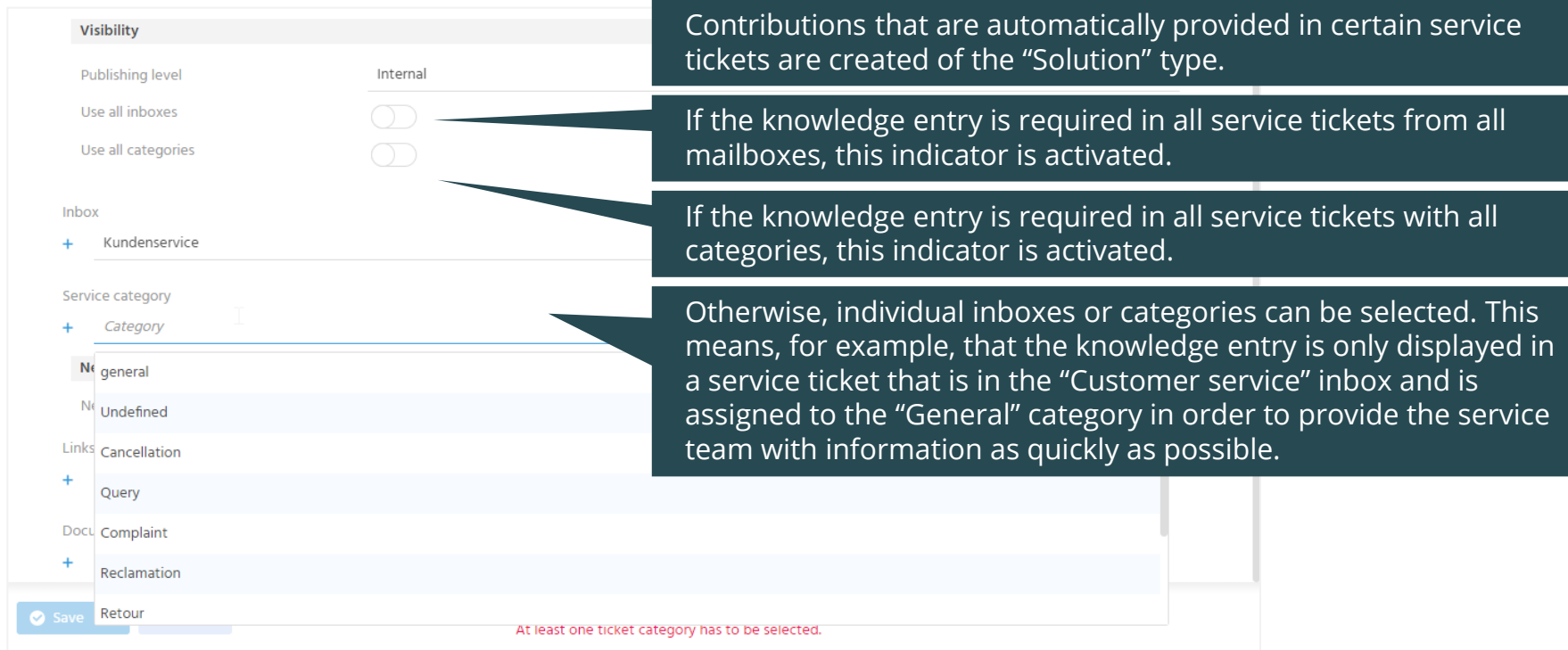




Knowledge
entry of type
"Solution"

Knowledge entries

Create knowledge entry of type "Solution"



Visibility

Publishing level: Internal

Use all inboxes: ☐

Use all categories: ☐

Inbox

+ Kundenservice

Service category

+ Category

- general
- Undefined
- Cancellation
- Query
- Complaint
- Reclamation
- Retour

Save

At least one ticket category has to be selected.

Contributions that are automatically provided in certain service tickets are created of the "Solution" type.

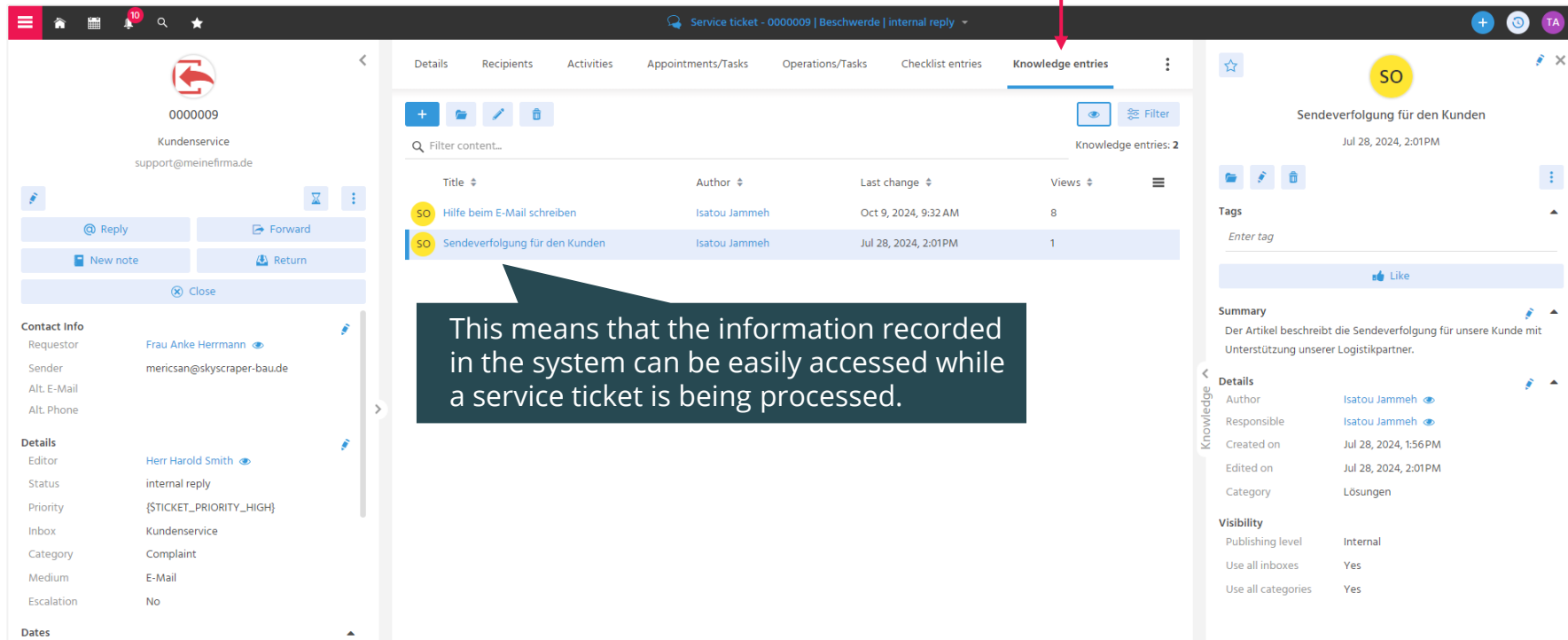
If the knowledge entry is required in all service tickets from all mailboxes, this indicator is activated.

If the knowledge entry is required in all service tickets with all categories, this indicator is activated.

Otherwise, individual inboxes or categories can be selected. This means, for example, that the knowledge entry is only displayed in a service ticket that is in the "Customer service" inbox and is assigned to the "General" category in order to provide the service team with information as quickly as possible.

Knowledge entries

Knowledge entry in the service ticket



The screenshot displays the ADITO service ticket interface. The top navigation bar shows the service ticket ID "0000009" and the status "Beschwerde | internal reply". A red arrow points to the "Knowledge entries" tab in the top navigation bar. The left sidebar contains contact information for "Frau Anke Herrmann" and details for the ticket, including the editor "Herr Harold Smith" and the status "internal reply". The main content area shows a table of knowledge entries. The first entry is "Hilfe beim E-Mail schreiben" by Isatou Jammeh, last changed on Oct 9, 2024, with 8 views. The second entry is "Sendeverfolgung für den Kunden" by Isatou Jammeh, last changed on Jul 28, 2024, with 1 view. A callout box points to the second entry with the text: "This means that the information recorded in the system can be easily accessed while a service ticket is being processed." The right sidebar shows the details of the selected knowledge entry, including the title "Sendeverfolgung für den Kunden", the author "Isatou Jammeh", and the status "internal reply".

Title	Author	Last change	Views
Hilfe beim E-Mail schreiben	Isatou Jammeh	Oct 9, 2024, 9:32 AM	8
Sendeverfolgung für den Kunden	Isatou Jammeh	Jul 28, 2024, 2:01 PM	1

This means that the information recorded in the system can be easily accessed while a service ticket is being processed.

Knowledge entry details:

- Title: Sendeverfolgung für den Kunden
- Author: Isatou Jammeh
- Responsible: Isatou Jammeh
- Created on: Jul 28, 2024, 1:56 PM
- Edited on: Jul 28, 2024, 2:01 PM
- Category: Lösungen
- Publishing level: Internal
- Use all inboxes: Yes
- Use all categories: Yes



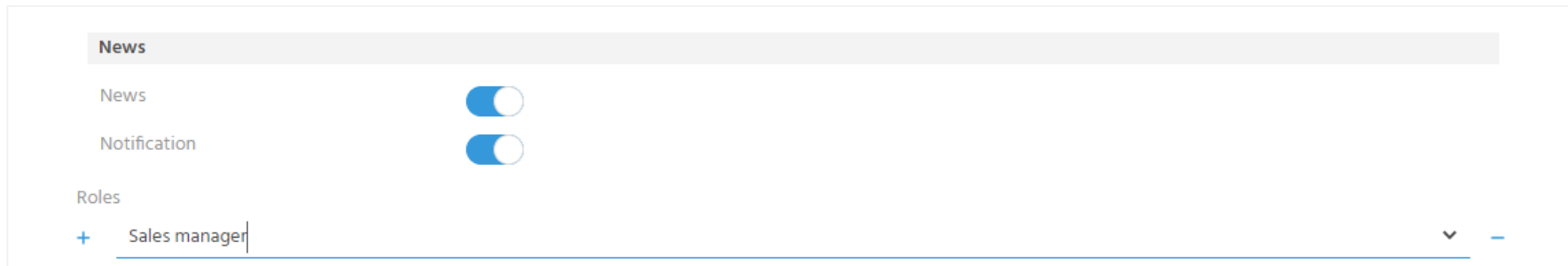
**Knowledge
entry as news**

Knowledge entries

Control knowledge entry as news

The news function can be used to inform employees about a new post.

Here you can specify whether users should receive a **notification** and which **role** a user must have in order to be informed about the news. If you do not specify a role, all users of the selected publication level can see the knowledge entry in their news.



The screenshot displays a configuration panel for 'News'. At the top is a grey header bar labeled 'News'. Below it, there are two toggle switches: 'News' and 'Notification', both of which are currently turned on (blue). Underneath these is a 'Roles' section. It features a search bar with a plus icon on the left and a dropdown arrow on the right. The text 'Sales manager' is entered into the search bar.



Notifications are only **sent when a new knowledge entry is created**, not when you subsequently adjust a knowledge entry.

Knowledge entries

News dashlets in the DashletStore

Knowledge entries labelled as “News” are displayed on the user page via **two available dashlets**.

These can be found in the **DashletStore** under the “Knowledge” category.



Newsfeed (Full)

Show complete news articles

Add

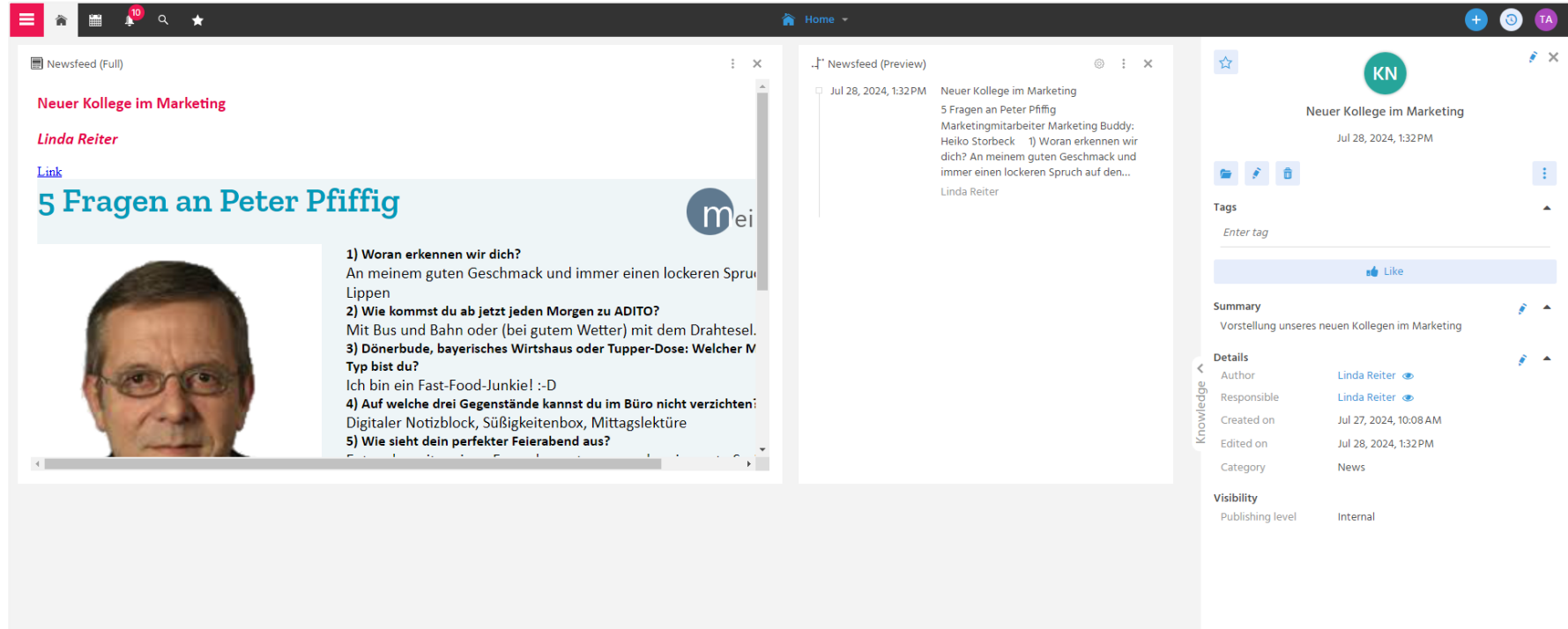


Newsfeed (Preview)

Add

Knowledge entries

News dashlets



The screenshot displays the ADITO News dashlet interface, which is divided into three main sections: a full view, a preview view, and a details sidebar.

Full View (Left): Shows a news entry titled "Neuer Kollege im Marketing" by Linda Reiter. The entry includes a link to "5 Fragen an Peter Pfiffig" and a photo of Peter Pfiffig. The content of the article is as follows:

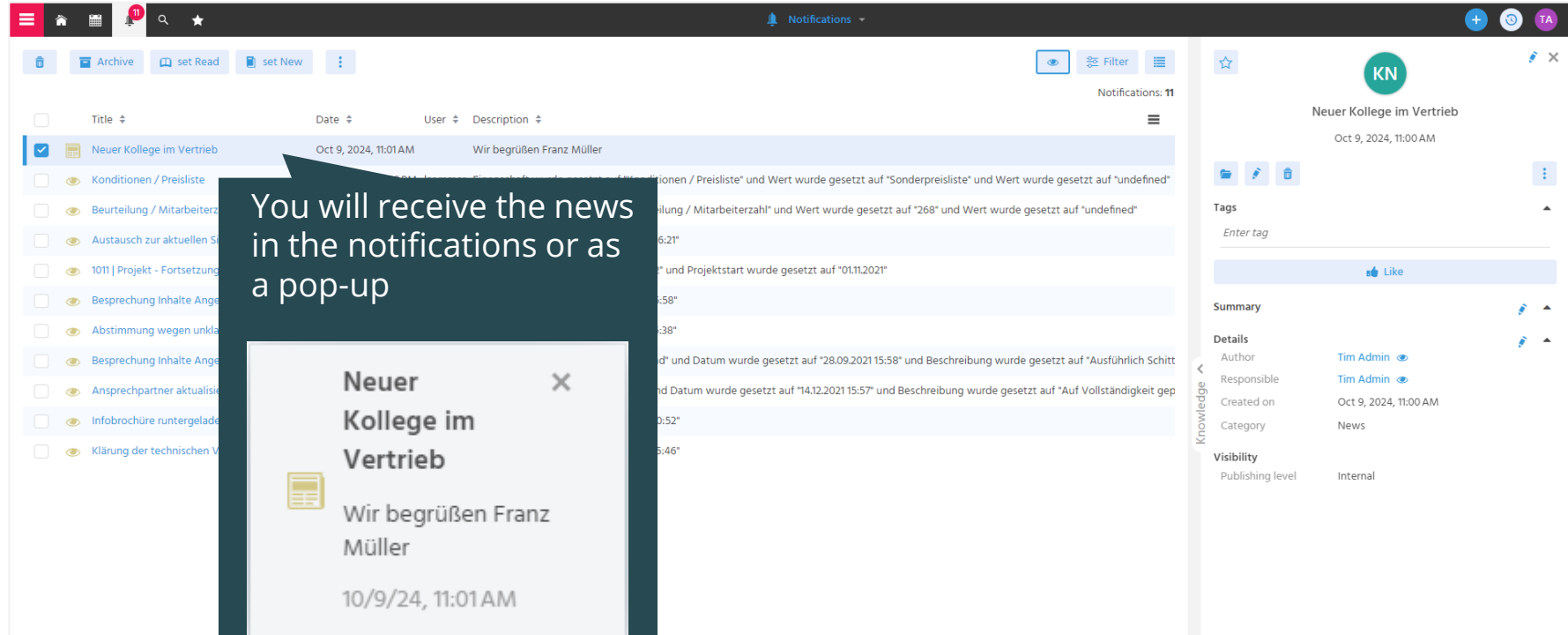
- 1) **Woran erkennen wir dich?**
An meinem guten Geschmack und immer einen lockeren Spruch auf den Lippen
- 2) **Wie kommst du ab jetzt jeden Morgen zu ADITO?**
Mit Bus und Bahn oder (bei gutem Wetter) mit dem Drahtesel.
- 3) **Dönerbude, bayerisches Wirtshaus oder Tupper-Dose: Welcher IV Typ bist du?**
Ich bin ein Fast-Food-Junkie! :-D
- 4) **Auf welche drei Gegenstände kannst du im Büro nicht verzichten?**
Digitaler Notizblock, Süßigkeitenbox, Mittagslektüre
- 5) **Wie sieht dein perfekter Feierabend aus?**

Preview View (Middle): Shows a preview of the same news entry, including the title, author, and a brief description of the content.

Details Sidebar (Right): Provides additional information about the news entry, including the author (Linda Reiter), the responsible person (Linda Reiter), the creation date (Jul 27, 2024, 10:08 AM), the edit date (Jul 28, 2024, 1:32 PM), the category (News), and the visibility level (Internal).

Knowledge entries

Notifications about news



The screenshot displays the ADITO interface. At the top, a navigation bar includes a menu icon, home, calendar, and a notification bell with a red badge showing '11'. Below this, a toolbar contains icons for archive, set read, and set new. The main content area shows a list of knowledge entries. The first entry, 'Neuer Kollege im Vertrieb', is highlighted. A dark blue callout box with white text points to this entry, stating: 'You will receive the news in the notifications or as a pop-up'. Below the callout, a detailed view of the notification is shown, featuring the title 'Neuer Kollege im Vertrieb', a sub-header 'Wir begrüßen Franz Müller', and the timestamp '10/9/24, 11:01 AM'. On the right side of the interface, a sidebar displays the details of the selected entry, including the title, date, tags, a 'Like' button, and a summary section with fields for Author, Responsible, Created on, Category, and Visibility.

Notifications: 11

Title	Date	User	Description
☒ Neuer Kollege im Vertrieb	Oct 9, 2024, 11:01 AM		Wir begrüßen Franz Müller
☐ Konditionen / Preisliste			
☐ Beurteilung / Mitarbeiterzahl			
☐ Austausch zur aktuellen Situation			
☐ 1011 Projekt - Fortsetzung			
☐ Besprechung Inhalte Angebot			
☐ Abstimmung wegen unklarer			
☐ Besprechung Inhalte Angebot			
☐ Ansprechpartner aktualisieren			
☐ Infobroschüre runtergeladen			
☐ Klärung der technischen Voraussetzungen			

You will receive the news in the notifications or as a pop-up

Neuer Kollege im Vertrieb

Wir begrüßen Franz Müller

10/9/24, 11:01 AM

Neuer Kollege im Vertrieb

Oct 9, 2024, 11:00 AM

Tags

Enter tag

Like

Summary

Details

Author: Tim Admin

Responsible: Tim Admin

Created on: Oct 9, 2024, 11:00 AM

Category: News

Visibility

Publishing level: Internal

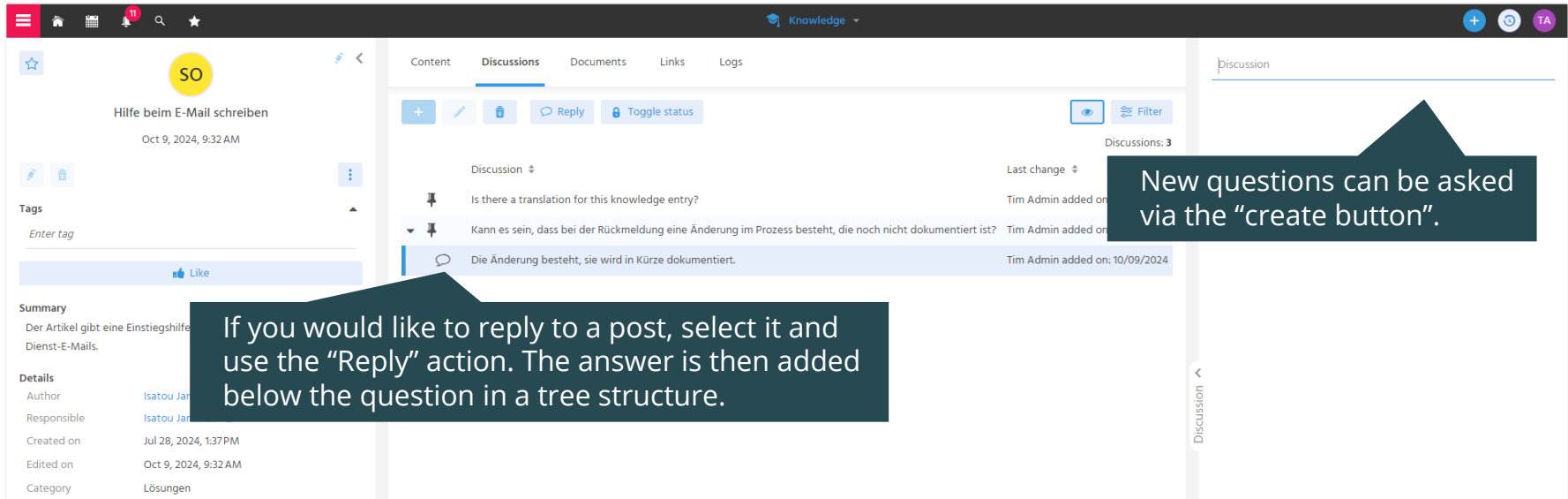


Discussions

Knowledge entries

Discussion – communication directly on the knowledge entry

The “Discussions” function allows you to post questions and answers to a knowledge entry. Everyone has the opportunity to post their questions here.



The screenshot displays the ADITO Knowledge interface. On the left, a knowledge entry titled "Hilfe beim E-Mail schreiben" (Help with writing emails) is shown, dated Oct 9, 2024, 9:32 AM. The entry has a yellow "SO" (Sehr Oft) rating. Below the title, there are tags, a "Like" button, and a "Summary" section. The "Details" section lists the author (Isatou Jar), responsible person (Isatou Jar), creation date (Jul 28, 2024, 1:37 PM), and edit date (Oct 9, 2024, 9:32 AM). The main content area shows a "Discussions" tab with a list of three discussion items. The first item is "Is there a translation for this knowledge entry?". The second item is "Kann es sein, dass bei der Rückmeldung eine Änderung im Prozess besteht, die noch nicht dokumentiert ist?". The third item is "Die Änderung besteht, sie wird in Kürze dokumentiert." Each item has a "Reply" button and a "Toggle status" button. A callout box points to the "Reply" button, stating: "If you would like to reply to a post, select it and use the “Reply” action. The answer is then added below the question in a tree structure." Another callout box points to the "Create" button (a plus sign in a blue box) at the top of the discussion list, stating: "New questions can be asked via the “create button”." The right sidebar shows a "discussion" search bar and a "Discussions: 3" indicator.

SO

Hilfe beim E-Mail schreiben

Oct 9, 2024, 9:32 AM

Tags

Enter tag

Like

Summary

Der Artikel gibt eine Einstiegshilfe für die Erstellung von E-Mails.

Details

Author Isatou Jar

Responsible Isatou Jar

Created on Jul 28, 2024, 1:37 PM

Edited on Oct 9, 2024, 9:32 AM

Category Lösungen

Content Discussions Documents Links Logs

+ Reply Toggle status

Discussion

Is there a translation for this knowledge entry?

Kann es sein, dass bei der Rückmeldung eine Änderung im Prozess besteht, die noch nicht dokumentiert ist?

Die Änderung besteht, sie wird in Kürze dokumentiert.

Discussions: 3

Last change

Tim Admin added on: 10/09/2024

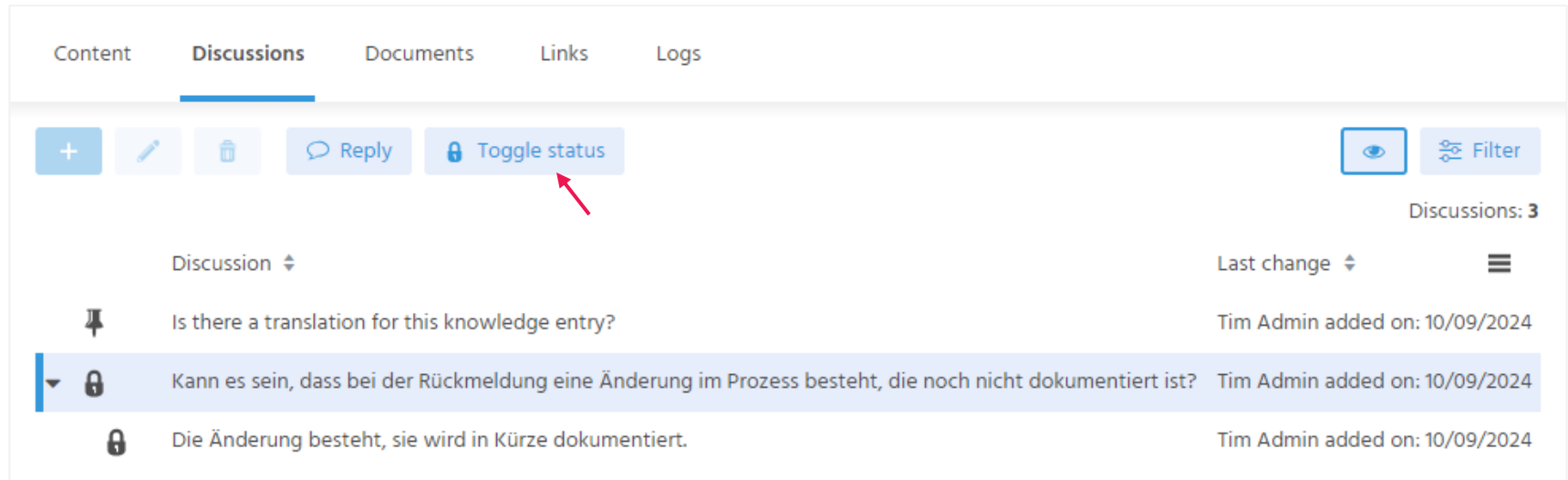
New questions can be asked via the “create button”.

If you would like to reply to a post, select it and use the “Reply” action. The answer is then added below the question in a tree structure.

Knowledge entries

Closing answered questions

As soon as a discussion is closed, the history can be blocked via the “Toggle status” action after selecting a post. This means that it is not possible to reply to a post on the selected question. The block can also be cancelled again using the “Toggle status” action.



The screenshot displays the ADITO interface with the 'Discussions' tab selected. The top navigation bar includes 'Content', 'Discussions', 'Documents', 'Links', and 'Logs'. Below the navigation bar, there is a row of action buttons: '+', a pencil icon, a trash icon, 'Reply', and 'Toggle status' (which is highlighted with a red arrow). To the right of these buttons are an eye icon and a 'Filter' button. Below the buttons, the text 'Discussions: 3' is visible. The main content area shows a list of discussions. The first discussion is 'Is there a translation for this knowledge entry?' with a pin icon. The second discussion, 'Kann es sein, dass bei der Rückmeldung eine Änderung im Prozess besteht, die noch nicht dokumentiert ist?', is selected and has a lock icon. The third discussion is 'Die Änderung besteht, sie wird in Kürze dokumentiert.' with a lock icon. The 'Last change' column shows 'Tim Admin added on: 10/09/2024' for all three discussions.

Discussion	Last change
Is there a translation for this knowledge entry?	Tim Admin added on: 10/09/2024
Kann es sein, dass bei der Rückmeldung eine Änderung im Prozess besteht, die noch nicht dokumentiert ist?	Tim Admin added on: 10/09/2024
Die Änderung besteht, sie wird in Kürze dokumentiert.	Tim Admin added on: 10/09/2024



Views & Likes

Knowledge entries

Views and Likes

- A view is each call by a user, i.e. if a user opens this entry twice, this results in two views.
- Unique views, users who have opened the entry several times, are only counted once
- To like an entry, the action in the preview is used.



Hilfe beim E-Mail schreiben

Oct 9, 2024, 9:32 AM



Tags

 Like

Summary

Der Artikel gibt eine Einstiegshilfe zum korrekten Schreiben von Dienst-E-Mails.

Details

Author	Isatou Jammeh 
Responsible	Isatou Jammeh 
Created on	Jul 28, 2024, 1:37 PM
Edited on	Oct 9, 2024, 9:32 AM
Category	Lösungen

Visibility

Publishing level	Internal
Use all inboxes	Yes
Use all categories	Yes

9
Views

1
Unique Views

0
Likes



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