Content Transfer

In Serviceware Knowledge

Versioning

Version	When	Who	What
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Table of Contents

1 Introduction

Aim of the feature „Content Transfer" is to allow the transfer of collective content from one user to one or several other users. This is predominantly relevant whenever a user who possesses content in Serviceware Knowledge is to be removed from the system. To date all content of the respective user had to be transferred manually – which is now obsolete.
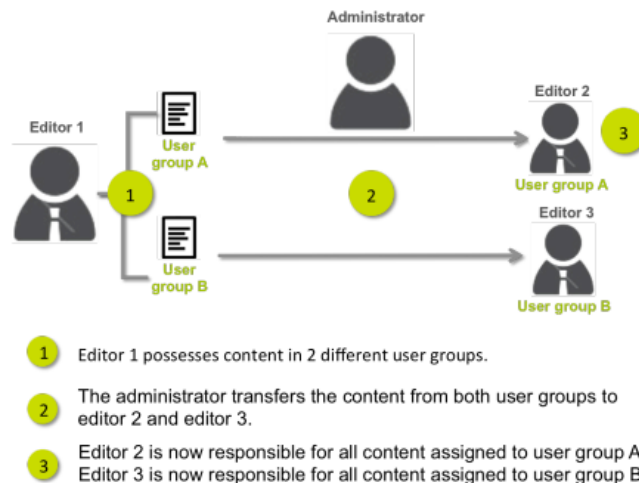

Figure 1 - The process of content transfer

2 Use Cases

Primary use case for the feature „Content Transfer" is a colleague working as editor in Serviceware Knowledge leaves the team or the company or takes over a new field of responsibility – and shall be removed from the system as a consequence. Prior to the removal of a user it is required to ensure, that he does not possess any content in Serviceware Knowledge. In this case the administrator has the possibility to transfer all content assigned to the respective user to other editors. After transferring all content the deletion of the user is enabled. The removal of a user, of course, is not prerequisite for using this feature. Another use case would be, e.g. that an editor just takes over a new subject area and is supposed to hand over parts of his fields of responsibility to another colleague. In this case the administrator can systematically transfer parts of his content to another user, too.

3 Working with the content transfer

3.1 Transferring content

Transferring content is reserved to administrators. Administrators who shall be able to transfer content need to have all of the following permissions assigned: - May see users - May edit users - May see user groups - May see roles In the Admin Tab the administrator selects the user whose content shall be transferred to one or several other users. The option „Transfer content" is displayed in the menu of the selected user.
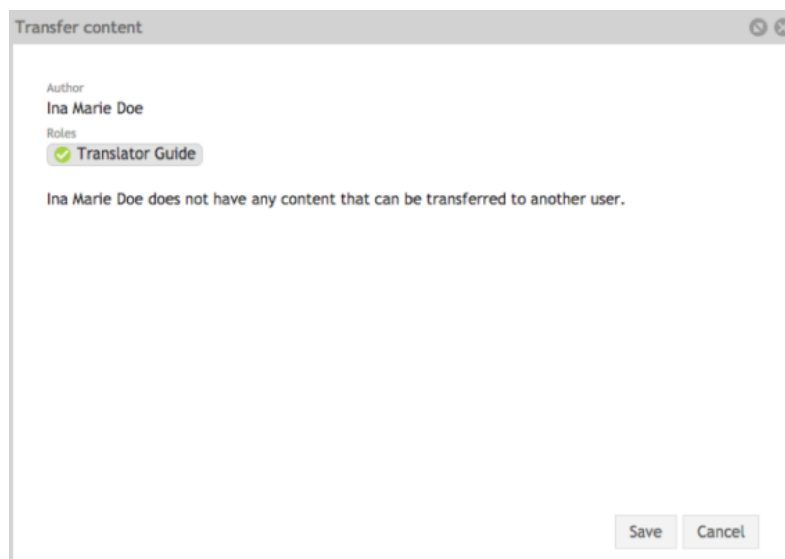
Header Title

Clicking on this option opens a popup in which the content transfer can be processed.

3.1.1 Users without content

If a user does currently not possess any content, the popup displays this information to the administrator. Transferring content will of course not be enabled in this case.

Header Title

3.1.2   Users with content and one user gruoup

If a user possesses content and is member in one user group only, the administrator is able to transfer the content for this respective user group to another user.
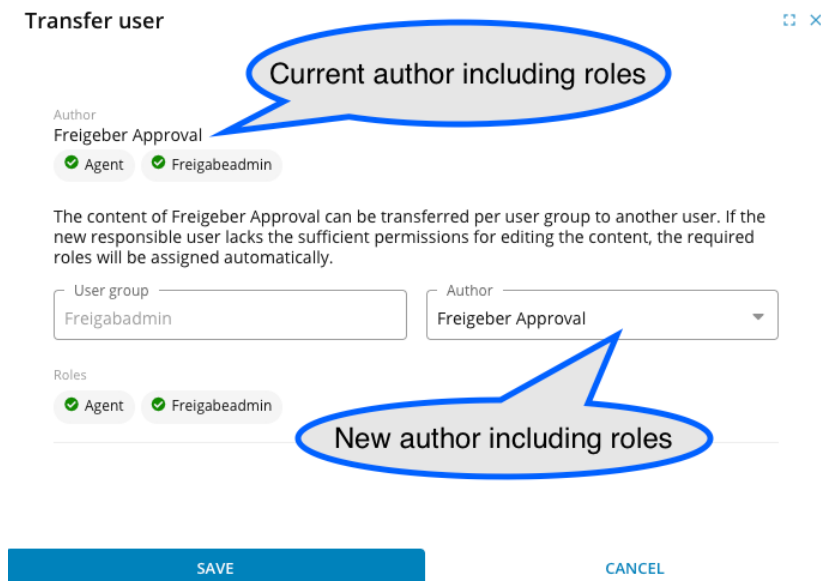
The different areas of the displayed popup are defined as follows:

Author: The user displayed here is the current „owner" of the content – thus the user whose content shall be transferred to another user.

Roles:
The roles displayed here are the roles that are currently assigned to the user.

User group: The user group displayed is the user group in which the user currently possesses content.

Header Title

Author: The author selected here is the user to whom the content shall be transferred. The user displayed by default is the current owner of the content. The users selectable from the drop down box must meet the following characteristics:

› **They are member of the respective user group**
› **They have at least one of the following permissions assigned:**
› May edit texts
› May edit documents
› May edit dialogues
› May edit tree
› May approve content

Roles:
The roles displayed here are the ones assigned to the user to whom the content shall be transferred. If the selected user does not have all roles assigned that the „original" user has, these roles will be displayed and marked with a red cross. The respective roles will be assigned to the new user in the course of the content transfer to secure, that the new user has all permissions available required for editing the transferred content.

If the user to whom the content shall be transferred does not have all roles assigned that the original author has, the missing roles will be automatically assigned to him during content transfer. Due to individual role configurations it is not possible to act on the assumption that the new owner of the content has all permissions assigned that are needed to edit the transferred content. By assigning the required roles the system secures, that all content can be edited by the new user from the start.
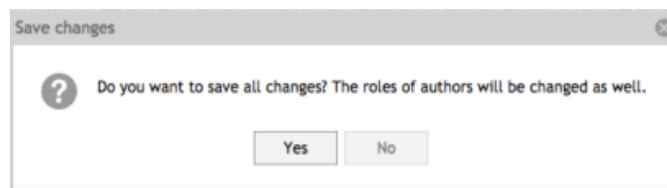

As soon as the user, to whom the content shall be transferred, is selected, a click on „save" displays another popup for the administrator to finally confim the content transfer.
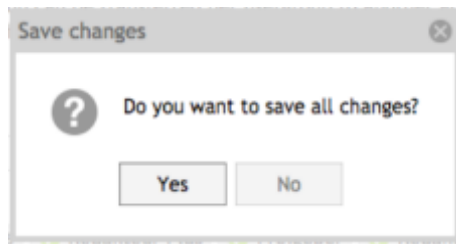
If additional roles are assigned to the new owner of the content, the popup transparently informs the administrator about this assignment.

3.1.3 Users with content and multiple user groups

If the user possesses content in more than one user group, the administrator is able to process the content transfer individually on user group level, because the other users are not necessarily members of all user groups assigned to the original user. In case that not all content of the user shall be transferred, the transfer can of course be processed for selected user groups only. The different areas of the popup displayed correspond to the areas contained in the popup for the content transfer for one user group (see above).

As soon as all content of a user has been transferred to other users, the following information will be displayed for the administrator when selecting the option „Transfer content" for the respective user. If this state is achieved, the administrator is able to remove the user from the system, assuming this was the reason for the content transfer.

3.2 Email notifications

Whenever content has been transferred to another user, the respective user is notified regarding his newly assigned content via email. This notification contains the following information:

› Name of the administrator who processed the content transfer
› User group that is assigned to the transferred content
› Type and number of transferred content:
› approvals
› documents
› dialogues o tree nodes
› texts

› Direct links to the following content:
› texts that will expire within the next 14 days
› texts that have already expired
› texts to submitted suggestions that are still active
› texts waiting for approval Thanks to the direct links this content can be opened directly and edited, if necessary.

3.3 Changes tot he system

As soon as all content of a user has been transferred to other users – he consequently does not possess any more content in Serviceware Knowledge
the following changes are applied in the system:
› The user is removed from the facet „Author"
› The facet „Modified by" stays unaffected until all content of the original user has been edited at least once by its new owner.