[FAQs](#)

⚠ The review is overdue, so the information might be old. Please contact the responsible.

❤ [To login form](#)

iPORTAL

Template version: [FAQs - Documentation Checklist](#)

FAQ's

About Information Management

❯ ❓ What is IM and what is it good for?

IM is the abbreviation for **Information Management**. Any information which is **relevant for the client organization** is collected (or referenced to), administered, maintained and made accessible to the authorized persons.

Many companies fail in information management. Information is often missing when urgently needed. The iPortal in combination with the support of information managers will guarantee successful information management. Information management replaces single-purpose documents with a **holistic and integrated approach**, where a unique source of information is accessed through different views.

Watch the video "Why IM?":

Listen to the audio "Why IM?":

Audio: [Play in browser](#)

❯ 🎵 Prefer reading over listening?

Even though the expenses for documentation of IT rise, the quality of IT documentation doesn't meet the requirements. In many companies, even basic decisions in IT can't be made promptly on a sufficient basis of information. Document management needs to be replaced by intelligent IT Information Management. But what is IT Information Management about?

IT Information Management brings together tried-and-tested approaches from other industries and creates a completely new approach.

Which approaches do you mean?

Firstly, these are proven approaches from Business Information Management. Secondly, there are standards from the technical documentation.

Okay, what can IT learn from Business Information Management?

Above all, we can learn the methods of Information Management. Notably, the most important are Information Capture and Governance. Concepts and methods of Business Information Management come from a US organization called "aiim".

The first method, Information Capture, is the first step in taking control of information. The second method, Information Governance, is the process of getting information from its source, and transferring it into some type of more formal information management system, and then recording its existence in the system. The third method is the creation of a taxonomy. A taxonomy is a hierarchical structure. The terms contained in here are controlled.

And what can IT learn from other organizations?

We learn from the German organization for technical documentation, which uses the concept of "Information Units". The US organization, aiim, offers certifications as CIP, certified information professionals. CIPs learn important principles and approaches in business information management, which can also be applied to IT information management.

To sum up, intelligent IT Information Management makes you faster and better, it reduces your efforts and your costs!

❯ ❓ What is the difference between IM and the iPortal?

Information Management is a **method**, the iPortal is a **tool**. The iPortal is a component of IM and is an innovative technical platform for managing content and displaying it in a portal. For more information see: <u>What is Information Management (IM), and what is it good for?</u>

❯ ❓ What is an IM project or IM program?

The main goal of <u>IM Projects</u> is to **document all relevant information within scope**. Traditional documentation processes are replaced with a more powerful information management process for the ongoing maintenance of the captured information.

❯ ❓ What is the IM business case?

Watch the video "What is the Business Case for IT Information Management?":

Video: <u>Play in browser</u>

About the iPortal

❯ ❓ What is the purpose of iPortal Innovators?

An iPortal is a platform for managing information. This iPortal in particular has two purposes. On the one hand, it is an **example for clients**. In meetings, the clients can see what their iPortal could look like. On the other hand, it is the **production platform** for our information managers. They test designs, technologies, compatibilities, and content. Anybody visiting the platform (clients, colleagues, freelancers, technical writers, and anybody else who is interested in the topic) can contribute, improve, discuss, give feedback and comment on the content and features to help iPortal Innovators grow!

❯ ❓ Is this like Facebook, Google or Wikipedia?

The iPortal is neither a corporate facebook, nor a corporate Google or Wikipedia. It is not like Google, because the information is created, located and maintained within the iPortal. Search engines like Google only find information and do not own it.

It is a social network because the users can communicate with each other. The iPortal is **most similar to Wikipedia**, with two major differences: First, there is only approved information in the iPortal. Second, the information is broken down into information units. That means, information is divided into small groups, which are meaningfully coherent and cannot be sensefully divided any further without becoming incomprehensible. Such a group of information is called an <u>Information Unit</u> and can be reused within the iPortal. There will be no redundancy in the iPortal.

❯ ❓ What does the orange owl Lii stand for?

My name is Lii, I **L**ove **I**ntelligent **I**nformation and I am here to provide **help and hints** on how to use the iPortal, and I give summaries of long texts and examples for complex subjects. Moreover, I point out additional content which you may also be interested in. Whenever you see the owl symbol 🦉 (Yes, that's how it works. Thanks for petting me!) hover or click me, and I will give you some additional information.

❯ ❓ How is the scope of the iPortal defined?

Here, in the demo **iPortal Innovators**, the scope is determined by the IM (Information Management) team – and its capabilities and limitations. Our vision is to fill the whole iPortal Innovators with examples and recommendations, so that the client's effort to build an iPortal is really, really small. But as the group of information managers as well is small, it will take some time to get there.

Any specialist can contribute, though! 😊 We also ask people who have never seen the iPortal before to give feedback on the pages. Moreover, we provide logins to potential clients, allowing them to contribute via comments. Thus, they can help to shape the iPortal. Interested experts contributing content help to fill the iPortal step by step, and the comments help us to improve continuously.

In **client projects** the scope is determined together with the involved stakeholders. See also: Procedure Models.

Roles in the iPortal

❯ ❓ How can I become an administrator to content?

Contact us. If you want to become the Reviwer, Responsible or Accountable for a unit or page, we will assign it to you. The role of the Information Manager is held exclusively by members of the IM team in this iPortal, since it requires a comprehensive understanding of the iPortals infrastructure and can be time intense.

❯ ❓ What does an Accountable do?

Accountables ensure that their Responsibles are doing their job correctly. If something is wrong with the unit (false information, poor intelligibility, messy layout, overdue reviews) they are **the ones held accountable**. So their job is to check and approve the Responsible's work.

Accountables choose Responsibles and Reviewers and set the exact scope for what will be documented. They can recommend and manage (This feature is comming soon.) comments and are shown at the Maturity Dashboards.

The Accountable should have basic knowledge about the subjects their units are dealing with, a rough overview of the iPortals structure, a more detailed overview of thea area their accountability lays in and should know what the Stakeholders goals are and how they affect the units they are managing. And finally, they should know their Responsibles.

❯ ❓ What does it mean to be a Responsible?

Responsibles create content. They collect information, write the texts for the Information Unit, update units and answer comments dealing with these units. Since this requires sound specialist knowledge, this role is usually taken over by an SME (Subject Matter Expert).

Responsibles can recommend and manage (This feature is comming soon.) comments and collect points for reviews. Being a page's responsible will make you known as an expert in certain fields, since your name is displayed at the page.

A comprehensive understanding of the subject is the most important qualification for a Responsible. They also should be aware of the requirements for content and the definition of an Information Unit, since this is what they are creating. Some basic knowledge of the Style Guide is helpful, but not required.

⌃

> ? What can I do as a Reviewer?

Reviewers **double-check the work of the Responsible**. They approve new or changed Information Unit before they are published. In addition, they support the Responsible by reading their unit at least once per review cycle and **telling the Responsible what must be changed**. This covers layout, structure, content and language. They also support the Responsible with reacting to comments.

They can collect points for doing reviews. Their name is shown on the pages they review, naming them as an expert for the subject the page deals with.

Reviewers needed good understanding for the unit's subject and an open eye for spotting mistakes.

⌃

> ? What are the duties of an Information Manager?

The job of an Information Manager is **to make sure that everything is in its place**. IMs (Information Managers) ensure that formats, filenames and content quality correspond to the guidelines. They are responsible for establishing the versioning system, administering metadata and making the content available. They also help with creating contents other than text, e.g. audios and slideshows, and they manage the whole information management process. That includes deviding the scope into areas and pages, defining and outlining information units together with the responsibles and publishing content.

Besides being able to use the CMS (Content Management System), Information Managers must know about the IM Versioning Scheme, the Classification Scheme, the rules of the Style Guide and the linguistic and content requirements that are placed on Information Units.

⌃

Orientation (General Structure of Content)

> ? What kind of information is in iPortal Innovators?

Here, in iPortal Innovators, you will find no client information, of course. The information you will find here...

- ...is about Information Management and how a client project could look like.
- ...are placeholders which demonstrate what client information would be there.
- ...are suggestions what information we would recommend in a certain area.
- ...can be drafts and templates which are almost ready to be used by the client.
- ...can also be anonymous client information.

⌃

> ? How do I find what I'm looking for?

The **search field** in the upper right corner is a good starting point. In addition, the structure of the iPortal can help. Click through **the menue at the left**. On the first page of every area, you will find an overview about the topic the area is about. You will quickly figure out what is where. Have a look at the IT Structuring Scheme for an explanation of the structure. If you still

cannot find what you are looking for, please contact your Information Manager or IM Program Manager (e.g. by [contacting us](#)).

❯ ❓ Where can I find an overview of the content of the different areas?

When you click on an area, you will find an short overview of this area on the first page displayed.

Applications	Describing the connections between the IT and its processes on the one hand and business processes and business applications on the other hand
Technical Documentation	Documentation for tools, applications, databases, technical infrastructure and so on
Work Instructions, How-To´s	Collection of all instructions and how-to's
Business Continuity, DR	Risk analysis, plans and tests for business continuity and disaster recovery in case of an emergency
Security	Policies, risk management, data protection and everything else regarding the security
Processes	Overview and description of all processes in the IT including flow diagrams, in- and outputs and responsibilities
Services	Describing different kinds of services as well as the different lifecycle phases of a service according to ITIL; service level definitions and the service catalog are found here
Projects	Overview of all projects in the organization, templates and guidelines on how to run a project and project management documentation are stored here
Organization	Organizational structure, objectives, organizational units, roles and functions
General Information	All kinds of guidelines, policies and standards, supplier contracts and other information relevant for every project and process
Glossary, Definitions	Table of technical terms and abbreviations with definitions and synonyms

❯ ❓ What is an information unit?

[Information Unit](#) are small groups of information. They create completely new possibilities. These include, beside maintainability of content, higher quality, easy access management, handling of metadata and more precise analytics.

Listen to the audio for **more details**:

Audio: [Play in browser](#)

❯ 🎵 Prefer reading over listening?

What is an Information Unit?

Information units are information elements or pieces or objects. This can be a text, graphic, picture, list, voice, video, or CMDB (Configuration Management Database) information. They are the smallest coherent unit of information that can no longer be meaningfully divided.

What are the advantages of information units?

Let's consider the disadvantages of large documents. Then the advatages of information units will quickly become clear.

Firstly, large documents are hard to maintain, while units are very simple to maintain.

Secondly, for creating or reviewing large documents you always need many different SME (Subject Matter Expert)s. For units only one. This results in a clear responsibility. They are thus created quickly and are likely to have a high quality.

A third disadvantage is, that access management for large documents is time-consuming. They always consist of very different areas. Each area requires its own access management. Units are homogeneous with easy access management.

Fourthly, handling of metadata for large documents also is time-consuming. For units it is quite simple.

Another disadvantage: Analytics on the usage of large documents are hardly possible. Usage data of information units are possible and powerful to reduce costs and improve quality. In addition, extensive documents cannot be included in a taxonomy. Units are very simple to include.

And last but not least, exchanging information with suppliers or customers is hardly possible with extensive documents. This is very easy with units.

❯ ❓ Where can I find information about the maturity of iPortal pages?

Ratings and comments can be found on every single page within the right column, showing its quality. **Summaries on the maturity** of information areas or sections can be found at the [Maturity Dashboards](#).

❯ ❓ What is the avato classification scheme?

The avato [Classification Scheme](#) is a taxonomy (A collection of controlled vocabulary terms organized into a hierarchical structure) for structuring information. We use it to organize [Information Unit](#). Structuring the information in such a way is of great advantage:

- The volume of documentation drops considerably (by up to 90%), redundancies can be avoided.
- Information becomes clear and reliable.
- Information is maintainable.
- Information can be found quickly.

Access the iPortal

❯ ❓ How do I log in?

1. Open your iPortal homepage. For example iPortal Innovators: https://iportal-innovators.avato.net/ ⬈
2. Click `Log In` in the right column.
3. Fill in your `username or email address` and your `password` .
4. Activate the option `Remember me` to set a browser cookie. You directly log into your iPortal landing page as long as the credentials are saved in the browser.
5. Click on `Log In` .

There is a [Login Help](#) page in case you face any issues.

❯ ❓ How do I register?

1. Open your iPortal homepage. For example iPortal Innovators: https://iportal-innovators.avato.net/ ⬈
2. Click `Register` in the right column.
3. Fill in the required information. 🦉 (First and last name, email address, username, password).
4. Click on `Register` .
5. Wait for approval by the IM team. Your account will ususally be activated within two days.

> ❓ How do I change my password?

1. On the login screen ↗, click **Forgot Password?** .

2. Enter the mail address you used for creating your account.

3. Click **Submit** . You will get an email whith a link to a page where you can set a new password.

> ❓ What can I do when I forgot my password?

1. On the login screen ↗, click **Forgot Password?** .

2. Enter the mail address you used for creating your account.

3. Click **Submit** . You will get an email whith a link to a page where you can set a new password.

Set the User Profile

> ❓ How do I change my profile data?

The only settings you can change is whether you want to be included on the lists of recommended Reviewers and Responsibles. This list includes your name and current score. Only Information Managers and Page Accountables can view it. To change the settings, **click on the profile icon at the top and select** **Edit Profil** .

If you want to change any other profile information, contact us.

> ❓ How do I delete my profile?

Click the profile icon in the blue top menu. Go to **Edit profile** . The button for deleting your profile is at the bottom of the page. We will delete your profile within one working day. (But we will be very sad. 🥲)

⚠ Be careful, if you want to register again, your points cannot be restored.

Gamification: Points and Status

> ❓ What is gamification?

Gamification is a method to employ elements from gaming to improve user engagement and organizational productivity. In the iPortal we use gamification in form of a **user profile award system**. You can collect points to reach higher states, which enables additional functions.

> ❓ How do I collect points?

There are **many ways** to collect points in the iPortal:

Awarded Points	Action	Restriction
1	Log in to iPortal	Once every 24 hours
1	Open a content page	Once per minute
1	Like a comment	

Awarded Points	Action	Restriction
3	Recive a like for your comment	
5	Write a comment with 5 or more words	
10	Recive a high-quality-star for a comment	
15	Update page as responsible	Only if before review date is overdue
0	Deleting a comment	

❯ ❓ What states do exist?

1. You **start as a Consumer**. In this state you can read content, rate pages and write and like comments.
2. If you have written a few comments which got liked, you become a **Contributor**. This allows you to flag comments if they contain wrong information.
3. If the Responsible or Accountable of a page marks some of your comments as high quality, you become a **Nominated Reviewer**. You are now included on the list of expert users who are known to be skilled enough to become Reviewers. You can refuse to apear on that list and can change your mind about this at any time.
4. Active Reviewers with high rated pages become a **Nominated Responsible**. You are now included on the list of expert users who are known to be skilled enough to become Responsibles. You can refuse to apear on that list and can change your mind about this at any time.

The icon of your current status is displayed above every comment you write, together with your name. That means every user can see how much valuable input you provided to the iPortal so far.

How do I contribute to the iPortal?

❯ ❓ How do I contribute to the iPortal?

The easiest way to contribute is **leaving comments** with questions or suggestions at the pages you visit. If you want to do more and write own information units, contact your IM team or just **send a draft** to avim@avato.net ✉. A simple MS-Word file (or similar) will do it. Use the style template ⬇ if you want to make it perfect. (But we are really thankful for all content, no matter what kind of format and layout it is in.)

❯ ❓ How do I write a comment?

At the **bottom of every page** you can find the comment section. Here you can enter comments.

At the moment, only Information Managers can edit or delete comments. Responsibles and Accountables can **highlight comments**. This function will graphically highlight the comment with a star at the top to underline its relevance to the topic.

❯ ❓ How do I give feedback or ask questions?

At the bottom of every page you can find a **comment section** where you can ask your questions or leave other feedback. The Responsible will get an email notification if you leave a comment. Otherwise you can contact the Responsible directly. You find their name in the right column of the page (with few exceptions).

You can also **rate the content by giving stars**. This feature is located at the bottom of the box in the right column of the most pages.

> ? Why should I rate information?

Rating information **adds points to your score**. In addition, the more users rate information, the better the quality of a page can be estimated. The rating can show you if it is worth reading a page before you start or at least help you to decide. In client environment it is also possible to display the best rated pages on the landing page.

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> ? How do I create a page?

Only Information Managers can create or change pages. You can contribute via comments or via the IM process (see Create for more information).

^

> ? How do I restructure an area?

Only Information Managers can restructure the iPortal areas. You can make suggestions and inform your Information Manager by writing comments or contacting us.

^

Check the Latest News

> ? Where do I find known errors?

If you find an error you can check at Known Errors if it is already known. If it is not listed there, please **leave a comment** with a description of the issue at the bottom of the page.

^

> ? What is developed next? (What's new? / Roadmap)

Click the newspaper symbol in the menu bar to view a list of things we are currently working on or have just finished.

^

> ? How can I be informed about content updates?

In the upper right corner of every page, there is a bookmark-icon. Click it to (un-) **subscribe to the page** (and its subpages, if you want to). You can choose which kind of changes you will be informed about. The system will send you email notifications.

The latest changes for every page are also listet in its **release notes** in the right column. The latest major changes are also shown in the **news section**. Click the newspaper symbol in the menu bar to view them.

^

Download & Export

> ? How do I download pages / information?

In the content section, at the top of the page's metadata column, click the control Download PDF . A **PDF export of the page** is created and saved in the default download path of your browser. Depending on your browser, the behaviour can be different.

^

> ? Can I download a whole area?

No, only pages can be downloaded.

^

> ❔ Where do I find an overview of the downloadable content?

In the menu bar an the left, there is a button for Downloads under the menu button.

∧

Appendix: Popup Content

Comments are only visibile to logged in users.