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Road Network Data Overview

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Network Model

Within the roads and transport context:

- Networks define a spatial concept for the movement of vehicles, goods and people
- A network is made of many connected segments.
- There can be different types of networks and segments.
- The network type represents the primary function of the network to move vehicles, pedestrians or other activities like carparks.
- Differentiation between the various network types is necessary for operational, management, funding and reporting requirements.

Network Classification

- Network Type: Defines the primary purpose of a network segment. The network type is defined at the road_id level in RAMM.

Networks are defined in RAMM, using a combination of the roadnames and carr_way tables. The following fields are used to record each component of the network definition:

- Network Type: Recorded in the road_type field in the roadnames table.
- Hierarchy: Recorded in the cway_hierarchy field in the carr_way table.

Standard Network Types and Sub Types

The following table sets out the available type and subtype combinations.

Network Type	Code	Network Sub-Type	Code
Road	L	Common Road	L1
[Local Authority]		Access Road (for Residential access)	L2
		Service Road (for Commercial access)	L3
State Highway	S	State Highway	S1

Network Type	Code	Network Sub-Type	Code
Path	P	Cycleway Off Road Corridor	P1
		Cycleway On Road Corridor	P2
		Footpath Off Road Corridor	P3
		Footpath On Road Corridor	P4
Carpark	C	At Grade Carpark Off Road	C1
		At Grade Carpark On Road	C2
		Park & Ride	C3
		Carpark Building	C4
Railway	R	Railway	R1
Busway	B	Busway	B1
Public Space	U	Public Space	U1
Paper Road	A	Paper Road	A1

Network Type	Code
Road [Local Authority]	L
State Highway	S
Road	R
Path	P
Carpark	C
Public Space	U
Paper Road	A

Notes:

- State Highway is separated out as RAMM hard codes some symbology to this selection
- On a similar basis 'Road' = 'Local Authority' in RAMM
- This model separates out ownership out of road type where possible. This is expanded on further below.

Road Hierarchy

National Network

NR National Route: Main roads that link population centres in two or more Provinces and/or main road traversing the entire length of an Island Province that acts as a collector road.

NM National Main Road: Roads that link major population centres and districts to National Routes, and/or strategically important centres (main towns, harbours, and airports).

ND National District Road: Roads within a single district that link population centres (villages) to areas of importance (large town centres, harbours, airports, markets, and hospitals) within the district.

NI National Institutional Road: Roads within National Institutions (Army barracks road, or University compound roads etc…). These roads can include roads required for reasons of National defence and/or security reasons.

Provincial Network

PT = Provincial Trunk Road: Major provincial roads connected to the National Road Network. Main links between different districts and between major provincial population centres within the same province. Links to provincial harbours, airports, and industrial areas. These roads have economical importance to the Province and the traffic usually includes heavy trucks. Trunk roads are usually sealed (or at least gravelled).

DF = District Feeder Roads: District links to the Provincial Capital and to other population centres inside the District. Links to minor ports and airstrips. The traffic consists mainly of personal vehicles and PMVs. District feeder roads are usually gravelled.

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LA = Local Access Roads: Local links to the population centres in Local Level Government areas. Links between different villages. Local access roads are usually earth roads, often only accessible by 4WD. The main purpose of these local links is to allow access of the rural population from Villages to health centres, schools and markets.

OR = Other Roads: Other roads not included in the National and Provincial networks, may include Private Roads (and later some of the present Institutional Roads). Other Roads also includes local town roads located within a Local Level Government Area, but not otherwise classified in the National or Provincial networks.

NETWORK OWNERSHIP

Use the following RAMM carriageway attributes to record different types of ownership:

Ownership Type	RAMM Table	RAMM Attribute
Asset	Carriageway	Asset_Owner
Land	Carriageway	Controlled_By
Maintenance	Carriageway	Maintained_By

Asset Ownership - Who owns the primary asset that allows for the network to achieve its purpose. (eg: the pavement if it is a road type = road)

Land Ownership - Who owns the land that the network uses to achieve its purpose (usually directly beneath the primary asset).

Maintenance Ownership - Which organisation is responsible for the maintenance of the primary asset.

Notes:

- Carriageway 'Owner_Type' attribute is mandatory so this needs to be related to the Asset_Owner attribute (this relationship can be automated)

RAMM Carriageways

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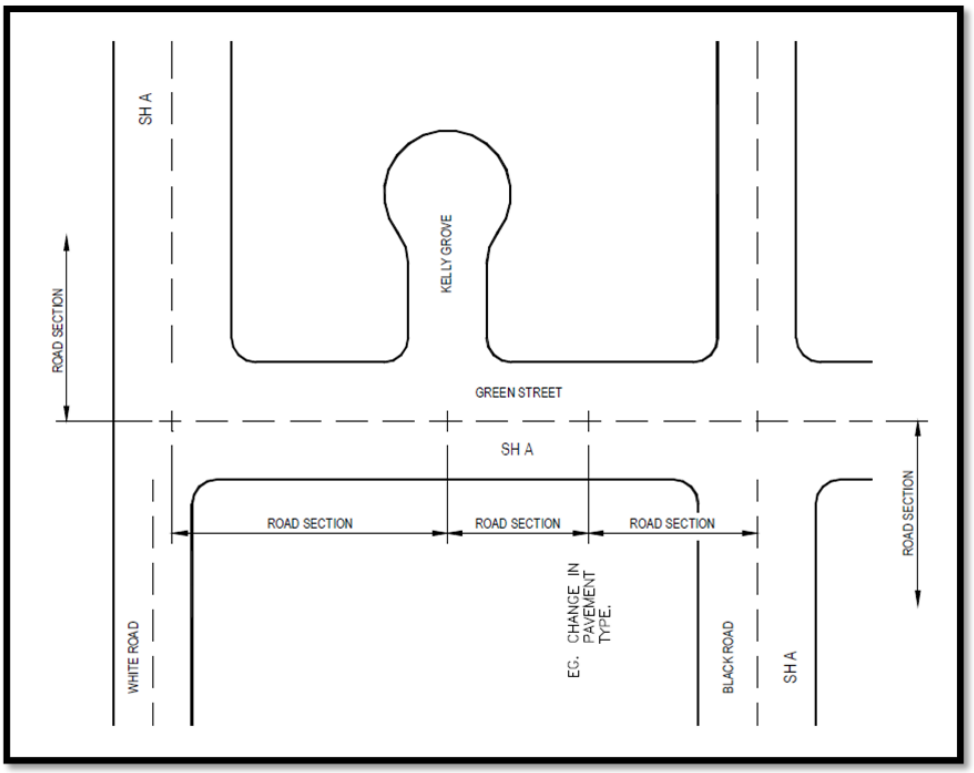
A road shall be broken into separate carriageways when the following characteristics change:

- Number of lanes, i.e. from 2 to 3 (at the start of a passing lane)
- Speed limit changes to greater than 70km/hr (urban to rural classification)
- Width changes by more than 2.5m over a significant length (typically >100m)
- Traffic volumes and/or composition change significantly such as at major intersections
- The pavement type (sealed, unsealed, structural, bridge)
- NZTA maintenance group classification
- Road class
- Road hierarchy
- Traffic management levels
- Ownership changes
- Administrational boundaries (i.e. ward or sub area)

Creating Carriageway Sections

An example of sectioning of a road network:



Methods to Update the RAMM Carriageway Data

- Automated bulk uploading of Carriageway data through the RAMM Manager data import facility (preferred method for large amounts of load data but not the typical approach)

- Manual updating of some minor attribute data in RAMM (preferred method for making those small minor changes such as changes to start and end names)
- Use RAMM Network Manager for all manual major or significant changes to dimensional related data, including adding new sections, splitting, joining and deletion
- Use RAMM Network Manager for unsealed to sealed changes to carriageway sections

Management of network and carriageways is quite advanced and forms the critical base information set which most other information is related to. On that basis it is essential that and changes are carried out by people with adequate training or experience.

Carriageway Direction & Lengths

Use the following guidence as a reference when carrying out activities that affect the RAMM Carriageway updates.

Survey Direction

General convention for the direction of roads (increasing linear reference) are *roads should be surveyed from the major traffic end to the minor traffic end*, as follows:

- Arterial road to collector road.
- Collector road to local road.
- Local road to the end of the road or to the cul-de-sac end.

Exceptions to this are one way roads where traffic flow dictates the survey direction.

Minimum and Maximum Carriageway Lengths

To avoid short carriageway sections (such as changes to number of lanes around signalised intersections, or short bridges) the following guidelines apply:

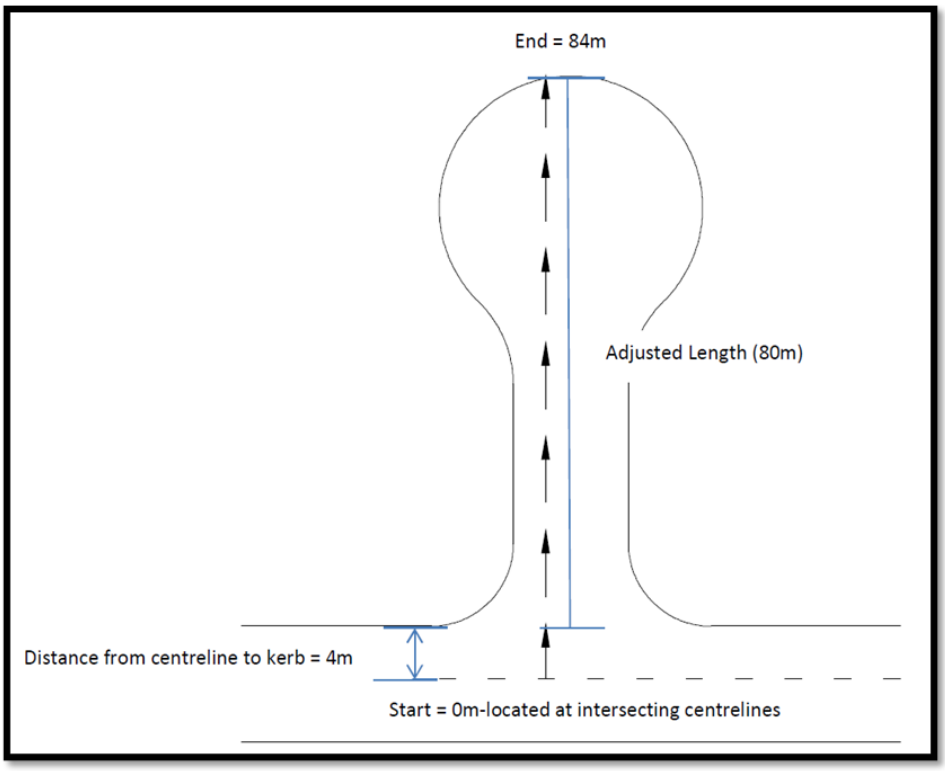
- Urban area - minimum carriageway length 30m, maximum carriageway length 1500m
- Rural area - minimum carriageway length 50m, maximum carriageway length 3,000m
- Typically, bridges longer than 50m have their own carriageway section

Exceptions to these should be avoided but will be required in certain circumstances.

Adjusted Carriageway Lengths

Generally, the length of a carriageway section is equal to the end meters minus the start meters. However, for first carriageway section of most roads starting from an intersection, the length needs to be adjusted to be the “end meters minus the start meters” less the distance between the intersecting centerline of each road to the kerbline. This length adjustment needs to be completed using the length adjustment option.

This also needs to be done for roads that end at an intersection.



Carriageway Scenarios: Divided / Dual Carriageways

Divided Carriageways (Full length)

Where a road has a physical median that separates each direction of travel over the full length of the road then each side has a separate road name and road id. The road name is suffixed in brackets with the travel direction for that road i.e. TE IRIRANGI DR (WESTBOUND) and TE IRIRANGI DR (EASTBOUND).

Single Divided Section (Not full length of road)

If the physical median is not present for the full length, then the increasing direction carriageway sections are contiguous (with no direction suffixed in brackets after the road name), i.e. TE IRIRANGI DR and decreasing section are added as required (with the direction suffixed in brackets after the road name) i.e. TE IRIRANGI DR (EASTBOUND).

Multiple Divided Sections

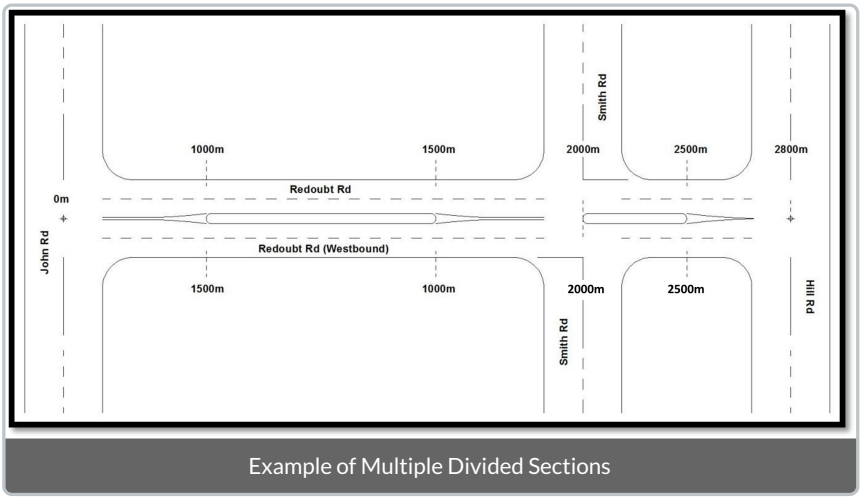
In the case where there is more than one divided section along the length of the road, then the running distance continues from the end of the first divided section through to the end of the last divided section. This will result in there being gaps between the divided sections, as the running distance is contiguous from the start of the first divided section.

Example: The table below shows an example of a road that has multiple divided sections along its length.

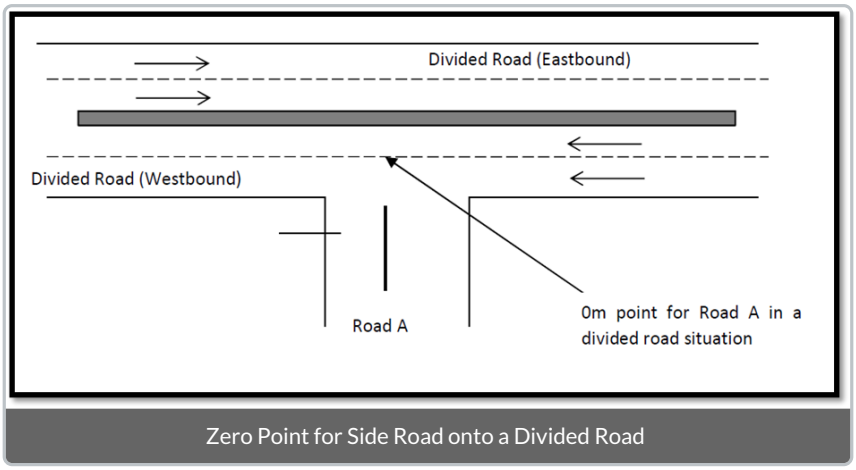
Roadname	Start m	End m	Start name	End name	No. lanes	Width
Redoubt Rd	0	1000	John Rd	Start divided median	4	20
Redoubt Rd	1000	1500	Start divided median	End divided median	2	10

Roadname	Start m	End m	Start name	End name	No. lanes	Width
Redoubt Rd	1500	2000	End divided median	Smith Rd (Start divided median)	4	20
Redoubt Rd	2000	2500	Smith Rd (Start divided median)	End divided median	2	10
Redoubt Rd	2500	2800	End divided median	Hill Rd	4	20
Redoubt Rd (Westbound)	2000	2500	Start divided median	Smith Rd (End divided median)	2	10
Redoubt Rd (Westbound)	1000	1500	Start divided median	End divided median	2	10

Note that Redoubt Rd (Westbound) is still measured in the same direction as Eastbound.



Example of Multiple Divided Sections



Zero Point for Side Road onto a Divided Road

Carriageway Scenarios: Roundabouts

All large roundabouts are surveyed as a separate road. Roundabouts are deemed large if approach islands are present. Small roundabouts, such as small domes or roundabouts with painted traversable islands are treated like standard intersections.

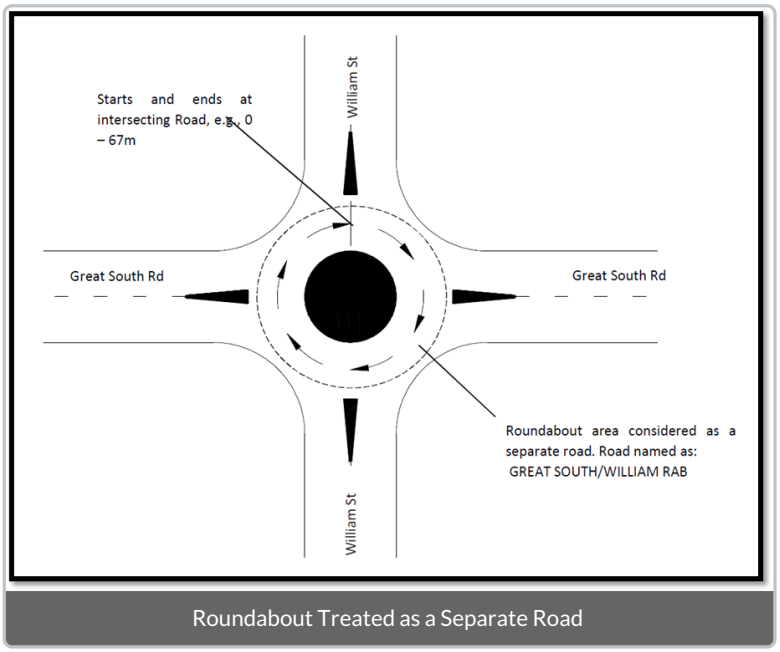
Roundabouts are named as follows:

"MAJOR ROAD NAME/MINOR ROAD NAME RAB", e.g. "GREAT SOUTH/WILLIAM RAB Note that the street suffixes are excluded in the road name. The start and end names are e.g.: "WILLIAM ST – WILLIAM ST" and include the suffixes. For two major roads, or roads of the same hierarchy, naming is ordered alphabetically.

Number of RAB identified where only the main road has name/details - in these cases suggest using the following (in order of preference):

1) ROAD/SITE RAB - where the RAB is associated with a nearby site such as a school, shopping centre or stadium, MAGI/6 MILE MARKET RAB

2) ROAD/RP RAB - where no better way of identifying, use the route position (approximate) of the RAB - e.g. MAGI HWY/10.5 RAB if RAB ~ 10500 RP.



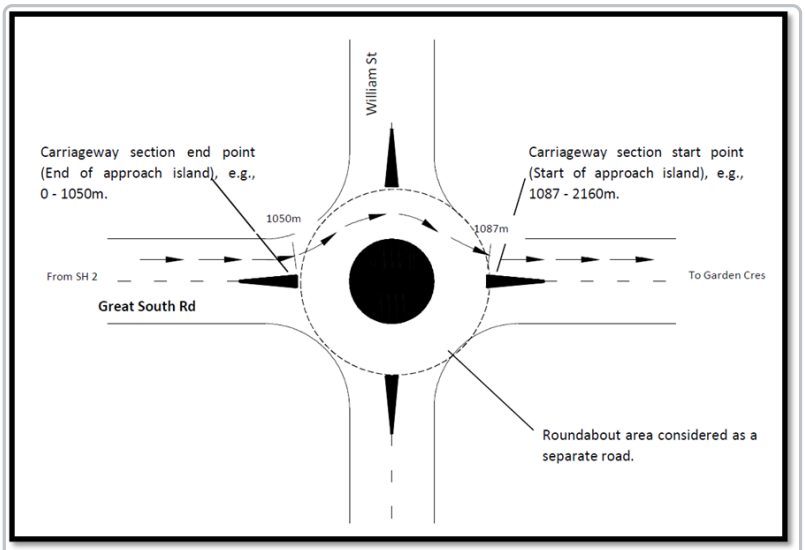
Roundabout Treated as a Separate Road

Additional Notes: Great South Road is the major road, so the naming convention is GREAT SOUTH/WILLIAM RAB, with start/end names 0 – 67, WILLIAM ST (NORTH) – WILLIAM ST (NORTH).

Roundabout Intersecting Roads:

Where roads start, end or intersect a roundabout, the carriageway sections will start/end at the roundabout approach islands. The island nose closest to the roundabout itself is used as the start/end point.

Where a road passes through the roundabout, the displacements are measured between the approach islands and a gap is in the displacements. The "gap" allows high speed data to be continuous when passing through the roundabout. This is illustrated in the diagram below:



Example of Carriageway Sectioning of a Road Through a Roundabout

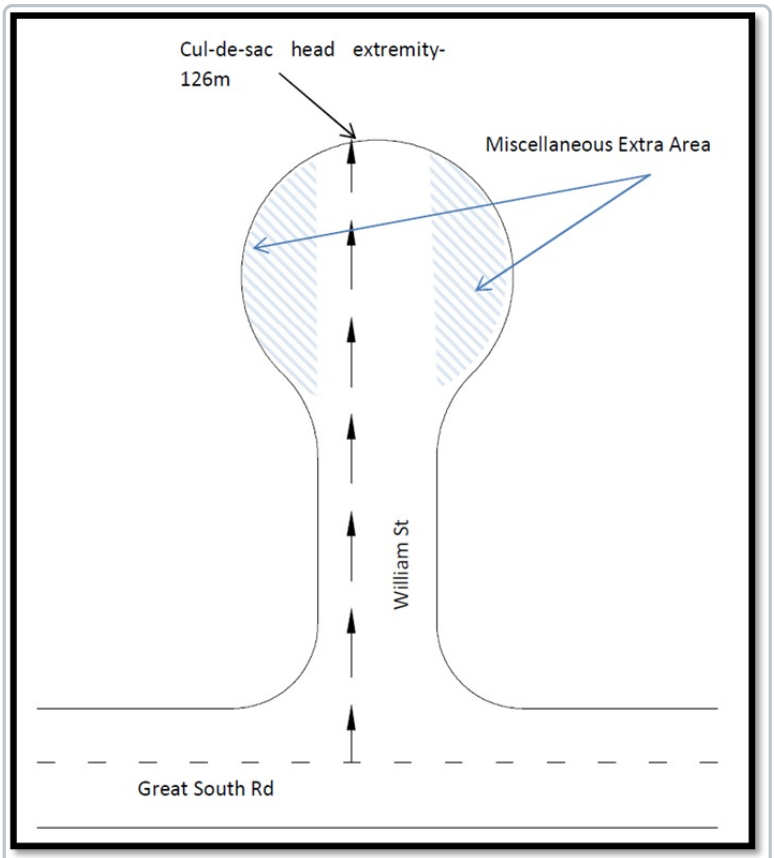
Example:

GREAT SOUTH RD, carriageways 0 – 1050m, SH 2 – WILLIAM ST and 1087 – 2160m, WILLIAM ST – GARDEN CRES. Note that a gap exists between the displacements. Any other roads that start or end at roundabouts start/end at the approach islands do not encroach on the roundabout area.

Carriageway Scenarios: Cul-De-Sacs:

The following describes how cul-de-sacs are surveyed, with respect to end position of the last carriageway section. Cul-de-sacs with small islands are treated like standard cul-de-sacs, measuring the extreme most point.

Cul-de-sacs with large islands are surveyed by splitting the carriageway at the start of the island nose when approaching the cul-de-sac, driving around the loop, and ending the carriageway at the same point when exiting the cul-de-sac head.



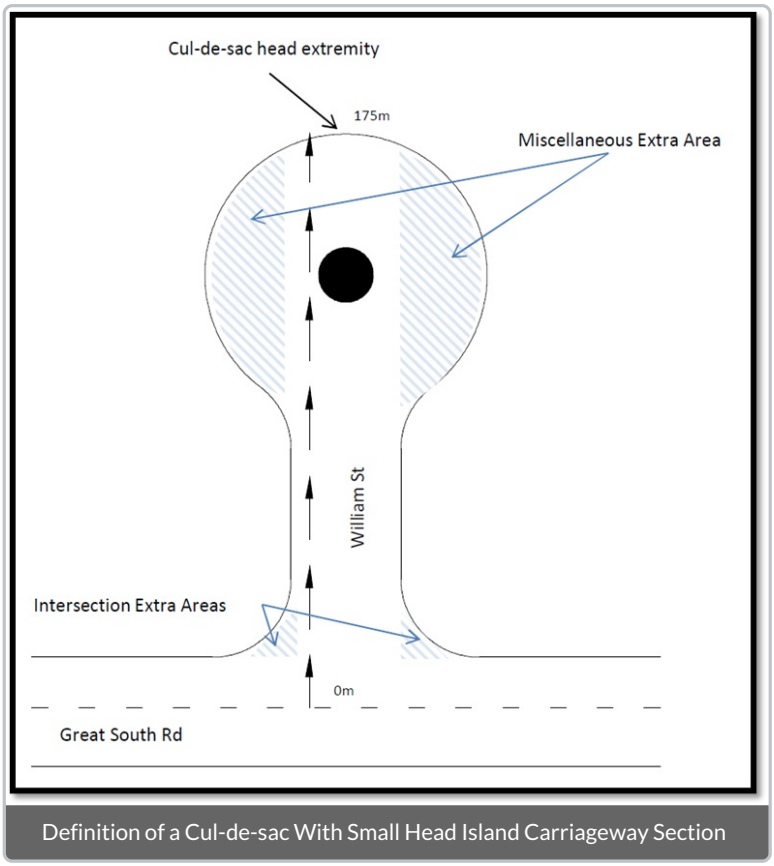
Definition of a Cul-de-sac Carriageway Section

The carriageway section for William Street will be as follows:

0 – 126m, GREAT SOUTH RD – CUL-DE-SAC

Cul-de-sac Head with Small or No Island

Cul-de-sacs with small islands that can be driven past without deviation through the cul-de-sac turning area to the end of the road will be treated like a normal cul-de sac.

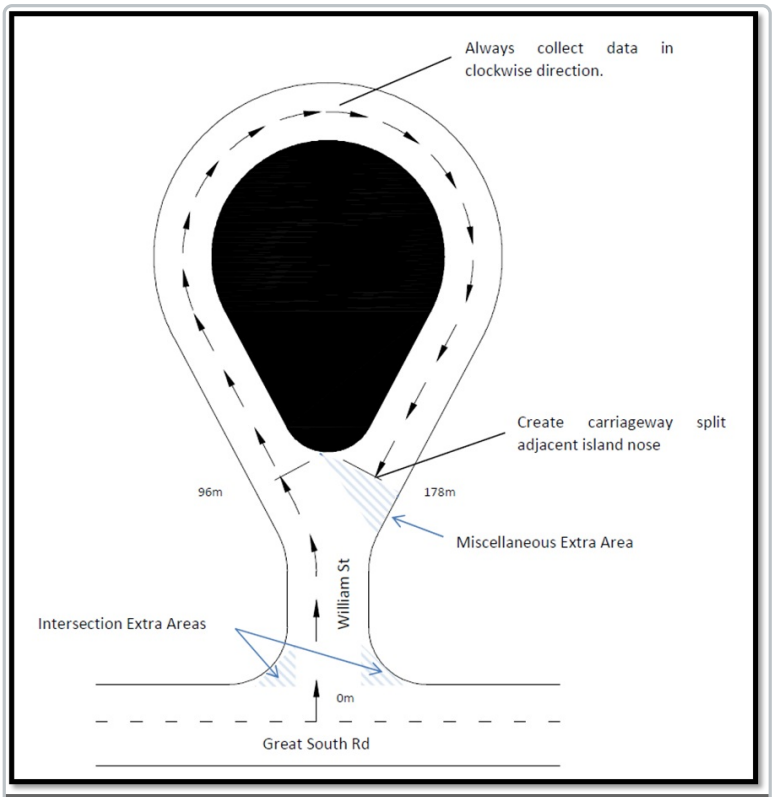


Definition of a Cul-de-sac With Small Head Island Carriageway Section

The carriageway section for Williams Street will be as follows:

0 – 175m, GREAT SOUTH RD – CUL-DE-SAC.

Cul-de-sac Head with Large Island



Definition of a Cul-de-sac With Large Head Island Carriageway Section

The carriageway section for Williams St will be as follows:

0 – 96m, GREAT SOUTH RD – START ISLAND RHS

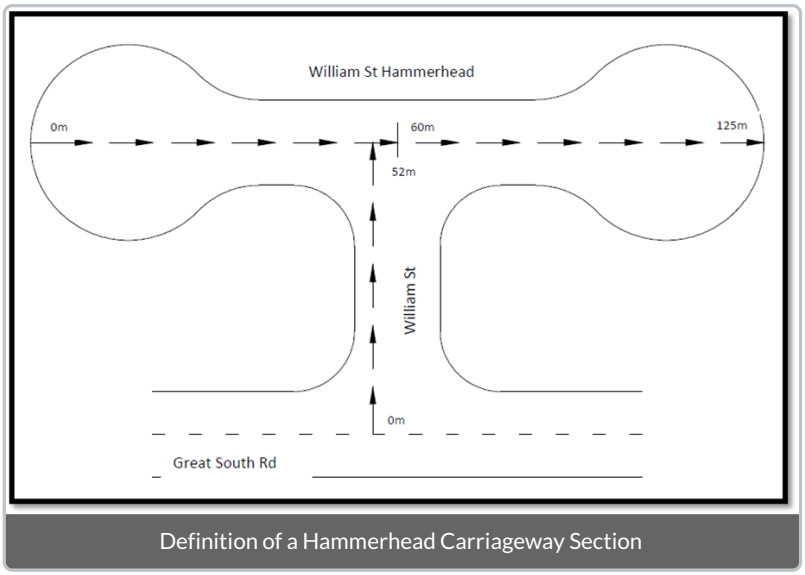
96 – 178m, START ISLAND RHS – END ISLAND RHS

Note: The last carriageway section is usually only one lane.

Hammerheads

For roads with hammerheads, set the main access road and hammerhead up as separate roads, e.g., WILLIAM ST and WILLIAM ST HAMMERHEAD. Survey the main access road from the road origin to the centreline of the hammerhead. Survey the hammer head from one cul-de-sac through to the other, describing the start and end points, e.g., CUL-DE-SAC (SOUTH). It is also desirable to create a carriageway split where the main road intersects to avoid any confusion regarding which end to start the survey. This is shown in the diagram below.

If the orientation of the hammerhead section is not obvious (i.e.: hammerhead does not run from east to west or north to south) then house numbers may be used to describe the start end and name fields of the hammerhead.



Definition of a Hammerhead Carriageway Section

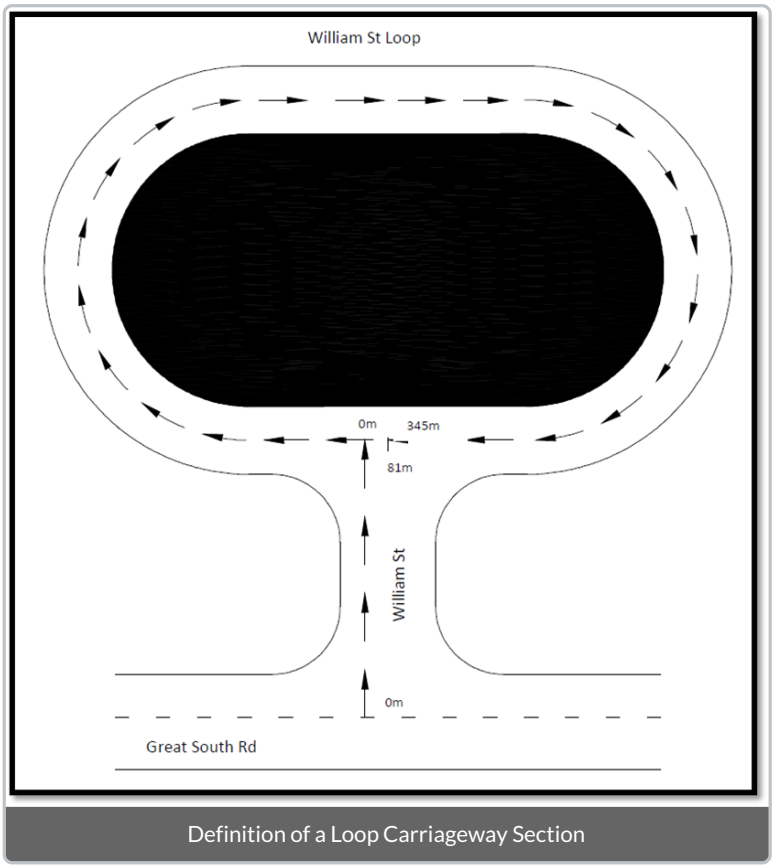
The carriageway section for Williams Street will be as follows:

Road 1: WILLIAM ST 0 – 52m, GREAT SOUTH RD – WILLIAM ST HAMMERHEAD

Road 2: WILLIAM ST HAMMERHEAD, 0 – 60m, CUL-DE-SAC (WEST) – WILLIAM ST and 60 – 125m, WILLIAM ST – CUL-DE-SAC (EAST).

Loops

This case is similar to hammerheads with the loop section being set up as a separate road, e.g., WILLIAM ST LOOP. Separating these elements into individual roads allows clear identification of each element, and the start and end locations for each section.



Definition of a Loop Carriageway Section

The carriageway section for Williams Street will be as follows:

Road 1: WILLIAM ST 0 – 81m, GREAT SOUTH RD – WILLIAM ST LOOP

Road 2: WILLIAM ST LOOP 0 – 345m, WILLIAM ST – WILLIAM ST

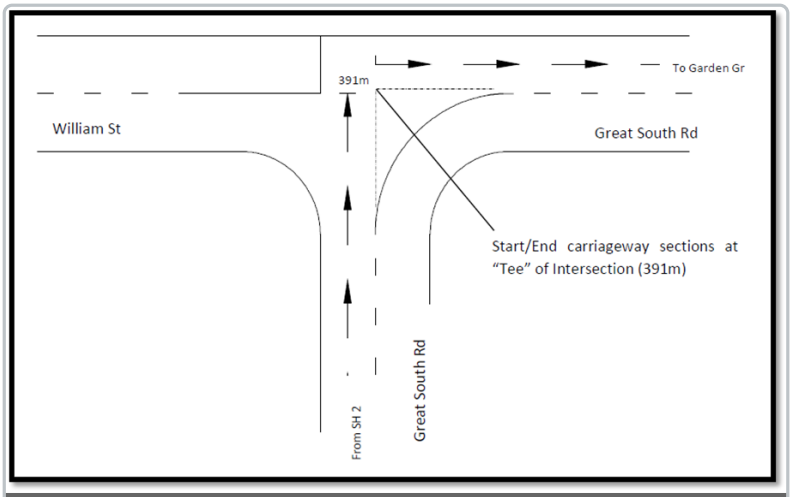
Defining Carriageways Start and End Points: Intersections

Use the following rules when determining carriageway start/end points:

- For both marked and unmarked intersections approaching at a right angle, the centre of the intersection is used
- For both marked and unmarked intersections approaching at a small angle, the centre of the intersection is used
- For marked intersections approaching at an acute angle, the point of the marking (or middle of the median island) will be projected at a right angle to the road being measured
- For unmarked intersections approaching at an acute angle, the middle of the intersection will be projected at a right angle to the road being measured.
- At all poorly defined intersections, well defined and easily locatable features such as sumps or power poles may also be used to further define the node, e.g. SMITH ST (SUMP LHS) – means that the node is located at Smith St adjacent a sump on the left hand side.

The following diagrams show methodologies for dealing with typical carriageway start and end point situations

Right Angle Intersection



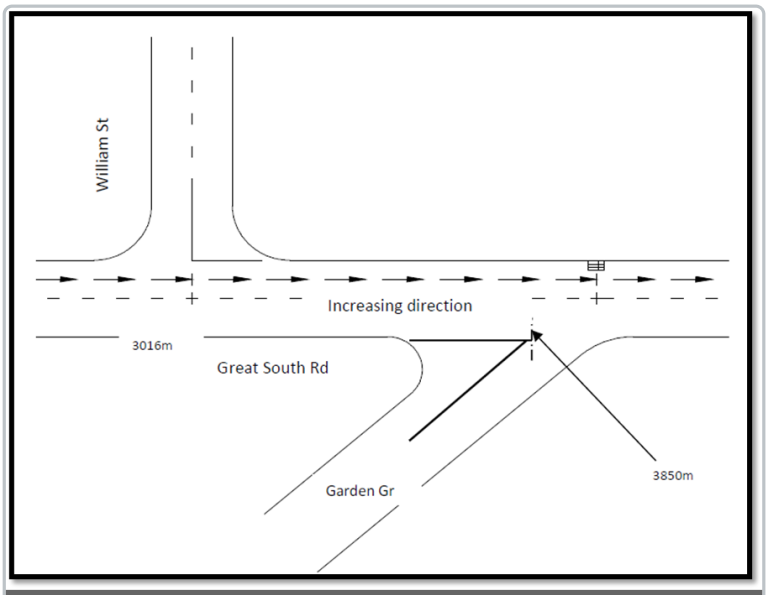
Carriageway Section Definitions for a Through Road Making a Right Angle Turn in an Intersection

The carriageway sections for Great South Road will be as follows:

0 – 391m, SH 2 – WILLIAM ST (AT TEE)

391 – 689m WILLIAM ST (AT TEE) – GARDEN GR

Acute Angled Intersection

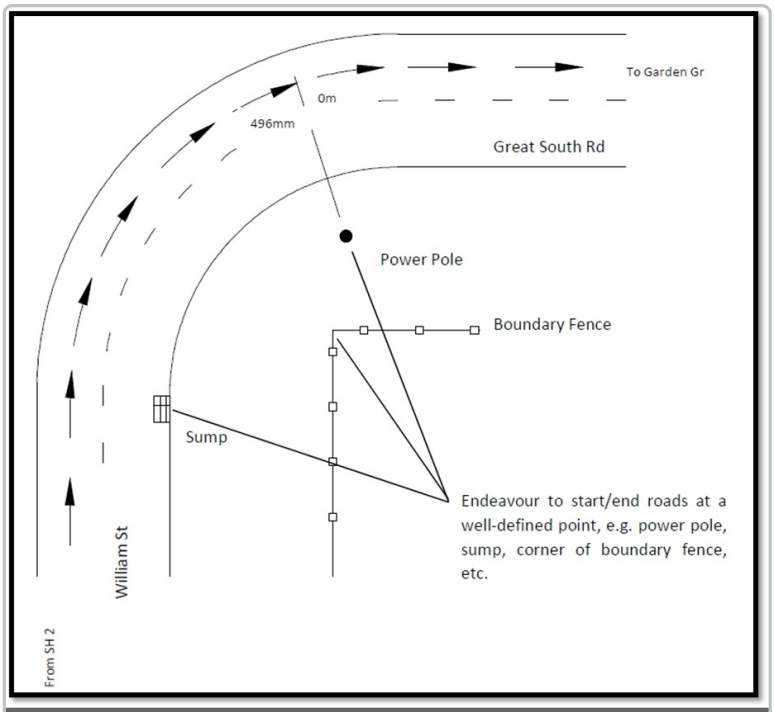


Carriageway Section Definitions for Intersections at an Acute Angle

The carriageway sections for Great South Road will be as follows:

3016 – 3850m, WILLIAM ST – GARDEN GR

Two Roads Starting/Ending on Curve



Carriageway Section Definitions for Two Roads Starting and Ending on a Curve

The carriageway sections for both roads will be as follows:

Road 1: WILLIAM ST, carriageways 0 – 496m, SH 2 – GREAT SOUTH RD (POWERPOLE RHS)

Road 2: GREAT SOUTH RD, carriageways 0 – 1065m, WILLIAM ST (POWERPOLE RHS) – GARDEN GR

Network Centrelines

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A centreline is the polyline spatial representation of an individual network segment or section. When combined together, these individual segments create a connected centreline network. Within the context of the RAMM, each defined road_id should have a spatial centreline representation in the database.

The Centreline network is important as it provides the principal spatial framework for all assets, datasets and activities to be spatially located on the network. Some RAMM applications are heavily reliant on the centreline network for core functionality, such as Pocket RAMM.

Centreline Rules

Use RAMM Network Manager to manage all centrelines and follow the following principles:

- Digitise centrelines along the length of the network segment, either aligned with the marked centre of the asset e.g. painted centreline, or the approximate centre of the asset if no markings are visible.

●The orientation of the centreline should be in alignment with the increasing direction of the network segment as defined in the carriageway table.

- The spatial representation must be in the New Zealand Transverse Mercator 2000 (NZTM2000) projection.

Within RAMM, the centreline data is stored in the map_road_layer table, however this is not directly accessible or editable through the RAMM application or SQL.

File formats supported for centreline management include;

- Well Known Text (WKT) File format
- Text file
- Spatial File (TAB file or Shape file)

Calibration Points

The centreline network is a flat two-dimensional representation of the network. As the physical world is three-dimensional, some alignment discrepancies between linear and spatial measurement systems can occur.

This is particularly common in scenarios where there are gradient changes in the vertical alignment of a network section. In these situations, the straight-line distance between two points does not reflect any additional centreline length resulting from these changes in gradient, therefore resulting in a difference between the spatial length and measure linear length.

A calibration point allows for a specific node on the network, to have both a defined northing and easting and measured linear displacement associated at the same location.

RAMM will automatically recalibrate all linear asset against the spatial network, to factor in any calibration points that have been added.

Calibration Point Management in RAMM

The map calibration points that are user definable are stored in the map_calibration_ud table. These points can be

added through the Pocket RAMM application and loaded through RAMM Manager. The required fields for calibration points include;

- road_id - the road_id for which the calibration point is being added
- ramm_location - the linear displacement of the point, from the road_id's origin point
- easting - NZTM easting coordinate
- northing - NZTM northing coordinate

System generated calibration points are stored in the map_calibration_cw table, although this is not directly accessible by RAMM users.

Calibration points are added to the database either through Pocket RAMM or via a loadfile through the RAMM Manager application.

Calibration Points and Roundabouts

(*also see the Carriageway section*) Where a road passes through a roundabout, the displacements are measured between the approach islands, and a corresponding carriageway gap is created between these displacements.

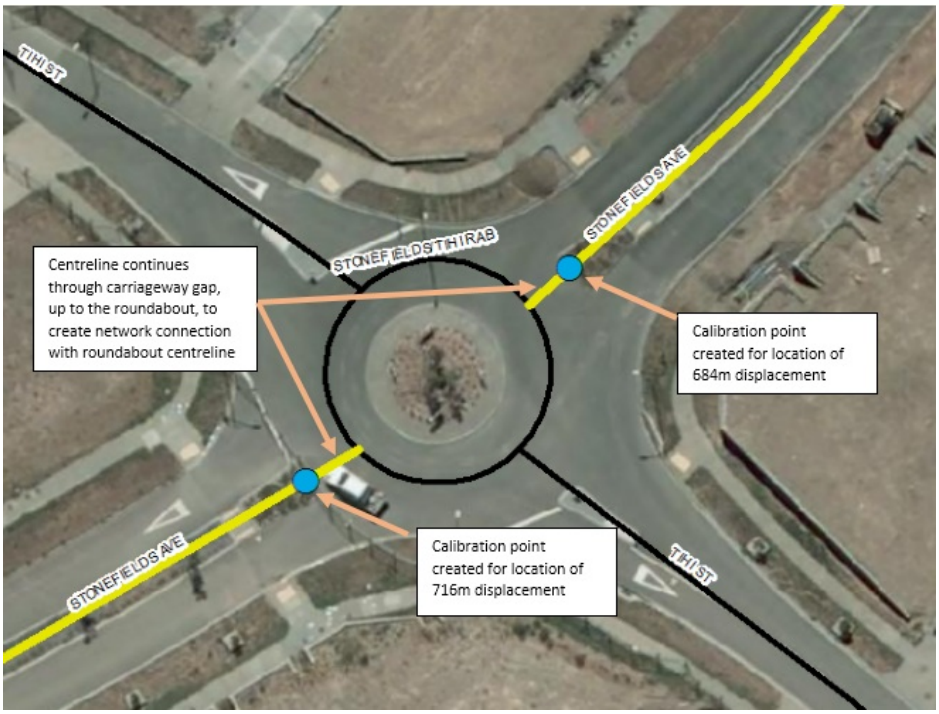
However, for the purposes of the centreline network, and to achieve a connected network model, it is necessary to create a spatial join between any adjacent roads and the centreline of the roundabout. Therefore calibration points are used to model these network features to make adjustments for these differences.

For example on Stonefields Avenue, there is a roundabout and subsequent carriageway section break at the Tihi Street Roundabout:

Road ID	Road Name	Start m	Start name	End m	End name
35983	STONEFIELDS AVE	0	MORRIN RD RAB	247	COLLEGE RD
35983	STONEFIELDS AVE	247	COLLEGE RD	423	STONEMASON AVE RAB
35983	STONEFIELDS AVE	451	STONEMASON AVE RAB	684	TIHI ST RAB
35983	STONEFIELDS AVE	716	TIHI ST RAB	829	ARUHE ST
35983	STONEFIELDS AVE	829	ARUHE ST	919	KAURIKI TCE

The 684m and 716m displacements are recorded at the approach islands, not at the intersection with the roundabout centreline.

Therefore calibration points shall be inserted at the point of the approach islands, to reconcile these coordinates with the start_m or end_m locations of the carriageway sections.



Network Segments and Intersections

Each centreline should be made up of one or more line segments, which break at intersection points.

RAMM has an automated process in place to manage programmatic calibration between carriageway data and the associated centreline representation. This process attempts to match centreline breaks to carriageway section start/end points. Therefore, to facilitate this process it is necessary to break centrelines at intersection points.

For example, in the screenshot below, the blue centreline has been created with breaks at the intersection points with the existing centrelines, which are represented by the yellow polylines.

The centreline for a road_id with multiple intersection points, would have multiple segments, to create a spatial

representation of the model.

In the example below, the road_id centreline would consistent of 5 line segments, to represent each component of the line between intersection points. Each segment has been colour coded to show the extents of the individual line segments;

Well Known Text (WKT) File Format

The Well Known Text (WKT) file requires centreline data to be provided in a specific structure, to enable the RAMM Network Manager application to interpret the information and create a spatial representation in the database.

The required format includes the road_id, sequence number and northing and easting details, as a pipe delimited string; *road_id*|*sequence*|*coordinates*

It is important the coordinates in the linestring, are defined and ordered in the increasing direction of the road. An example of this is below, for a centreline with two segments for a single road:

30002|05|LINESTRING (1756266.85 5919213.1, 1756352.16 5919253.86)

30002|10|LINESTRING (1756352.16 5919253.86, 1756410.4 5919282.18)

If measures are known for points in the linestring, these can be embedded in the WKT file as well, in the following format;

road_id|*sequence*|*coordinates measure*

An example of this is below, for a centreline with two segments, with measures, for a single road:

30002|05|LINESTRING (1756266.85 5919213.1 0, 1756352.16 5919253.86 92)

30002|10|LINESTRING (1756352.16 5919253.86 92, 1756410.4 5919282.18 155)

Each sequence is representative of the network segment between two intersecting points on the centreline. For consecutive segments, the start point of a segment should be the same as the end point of the preceding segment.

This is illustrated in the example below, where the end point of the first segment is the same as the start point of the second segment;

30002|05|LINESTRING (1756266.85 5919213.1, **1756352.16 5919253.86**)

30002|10|LINESTRING (**1756352.16 5919253.86**, 1756410.4 5919282.18)

Adding Traffic Counts to RAMM

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RAMM Notes and Assumptions	Indicative (draft) Data Dictionary	Other Supporting Links
RAMM has a MetroCount import tool. There are supporting configuration files available to help export data from the MetroCount application in a RAMM compatible format. The second link included on the right is a MetroCount support page discussing the process from a MetroCount perspective.	*(RAMM compatible import file to be generated from MetroCount software)*	Help page in RAMM with additional file downloads **MetroCount support page for RAMM** RAMM NZ Vehicle Classification Document RIMS Traffic Counting Guide Supplement

User Management

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Why permissions are important

- Data protection is extremely important and needs to be managed carefully.
- Within any organisation there will be many RAMM users with varying roles and responsibilities.
- The permissions in RAMM around access, and which actions can be performed on assets and other data are extensive.
- The Database Owner has the ability to control who has access to the database, which RAMM applications they can use, and specifically what actions they can perform within each application.

Area of access to RAMM

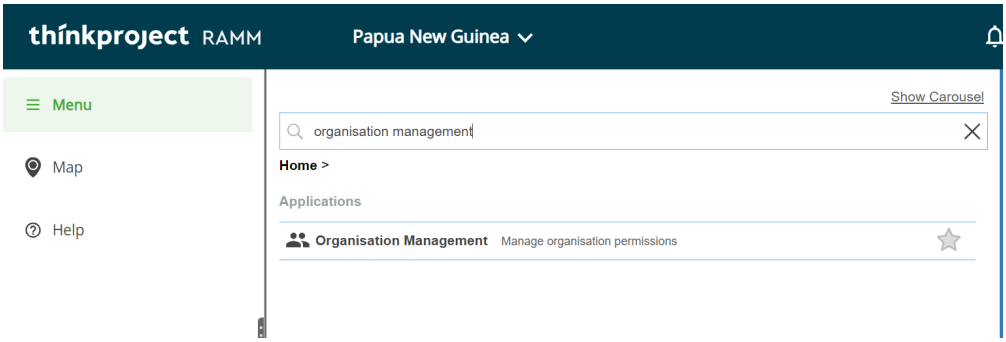
Initially, a user requires access to the database. Once access is granted, there are then further permissions for:

- **Asset Management** - Permissions allowing access to Security Zones (Areas), and to different assets in that Security Zone, as well as permissions for specific RAMM applications.
- **Work Management** - Permissions to create a Project/Contract and perform work on the assets in the database. Projects/Contracts are linked to a Security Zone. You can learn more about Work Management in our Jobs/Dispatches course.

Asset management

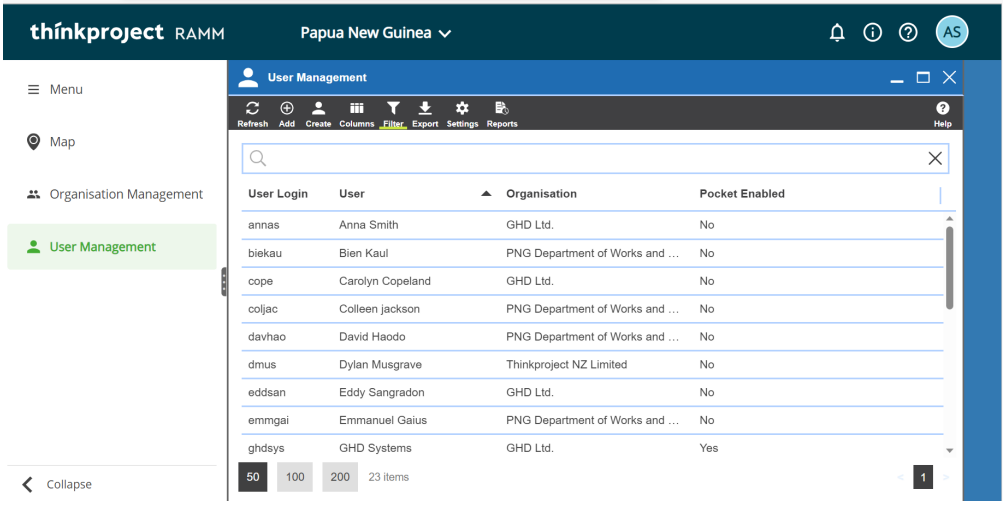
- *Security Zone Access - Asset Management*
- Within each database there will be one or more Security Zones. Users are granted access to the zone or zones where the assets are that they are responsible for maintaining.
- Within each Security Zone individual users can be granted permissions in these areas:
- **General** - Range of general database permissions for the Security Zone
- **Assets** - Permissions for individual assets
- **Staff** - Permissions for editing staff access
- **Specialist** - Permission to access more specialised RAMM applications.

Organisation management- where you create a new user log-in or update your password



User management- lets you view user permissions

Current Users with access

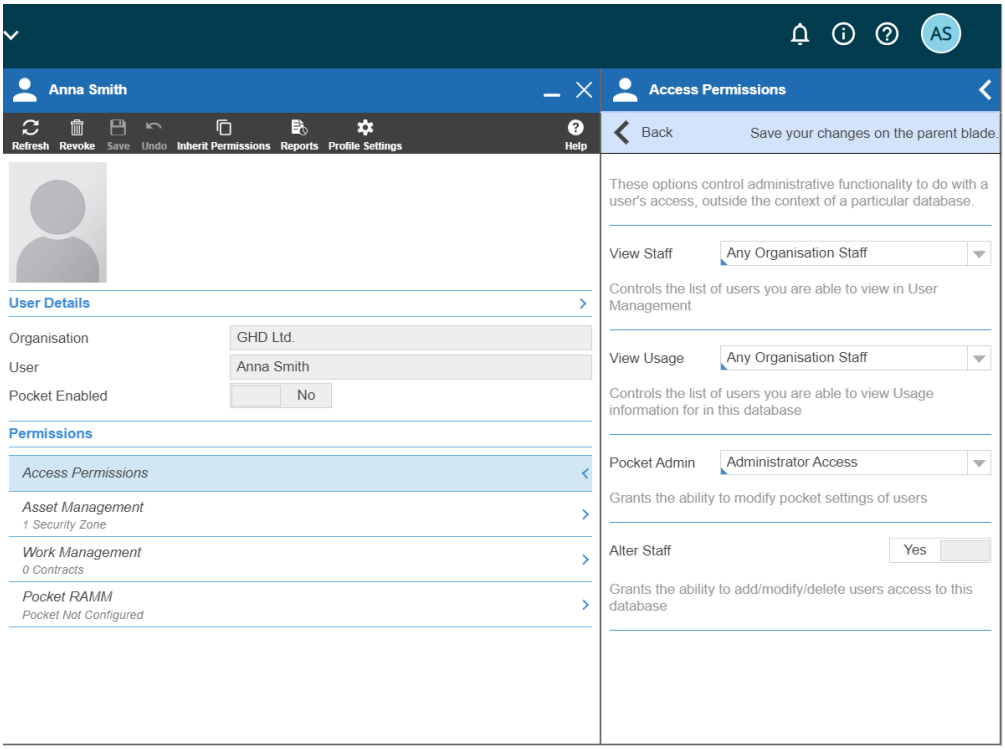


Permission areas in RAMM

Access permissions- tells you if the user has permission to view other users and/or if the user can edit other user permissions

Asset Management - shows you the security zone/s a user has access to as well as the users level of permissions in terms of updating/editing asset and inventory data

Work Management - shows all of the contracts a user has access to



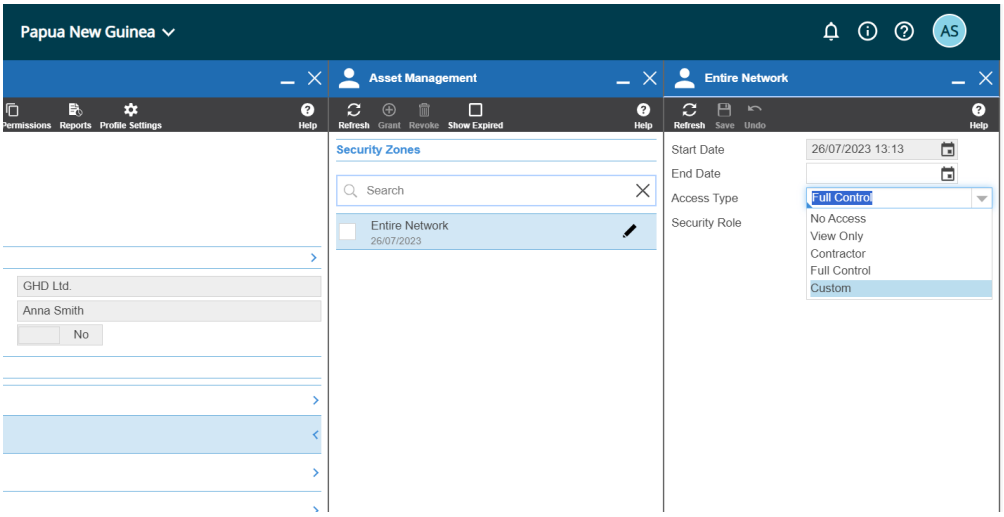
Asset management permission levels

view only access - where you cannot edit asset data but can view all data

Full control - where you can edit all asset data

Contractor - default RAMM permissions set up for a contractor

Custom – where you can edit/view pre-selected asset data



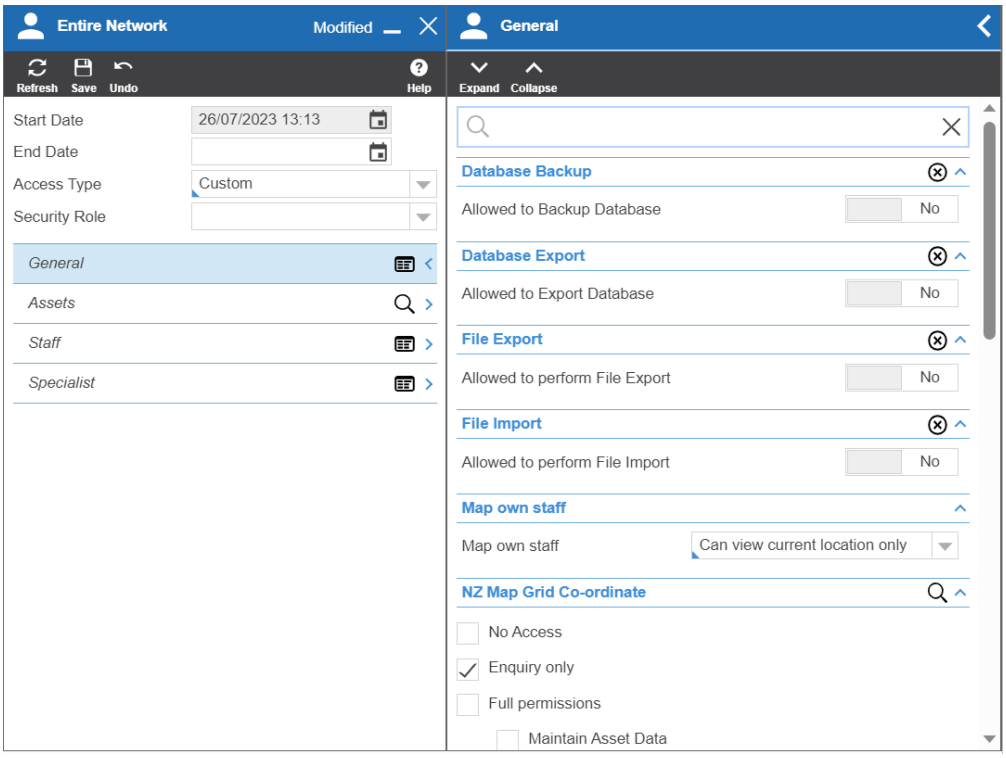
Custom RAMM settings

General- covers permissions for things such as exporting data from the database/importing files, adding UDTs, SQL access

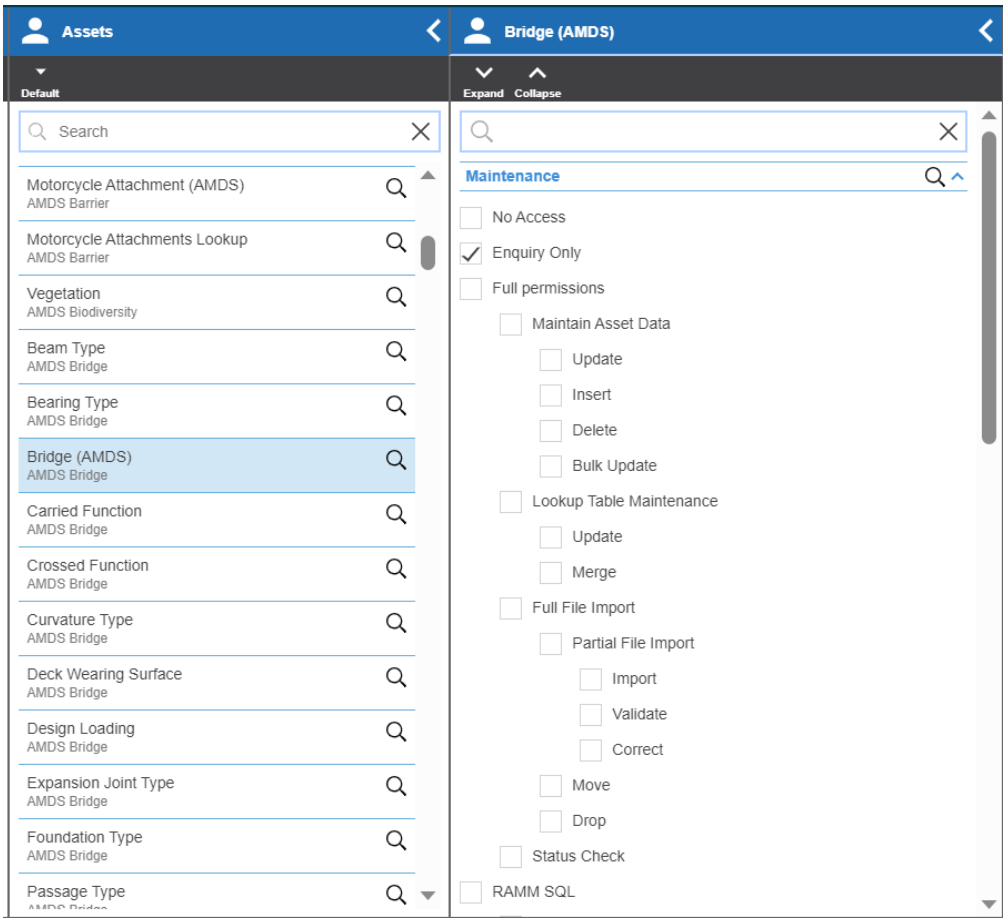
Assets- covers permissions for individual asset types

Staff- covers permissions for other RAMM users

Specialist- covers permissions for RAMM functions that are specialised such as high speed data, forward works programming, centreline segments



Bridge asset permissions example



Update

Insert

Delete

Bulk Update

Approve (if turned on for the asset type)

RAMM permissions key facts

- RAMM permissions can be customized to only include certain assets per user
- Anyone can have view only access for all asset data
- generally 1-2 users will be able to update/edit user permissions as well as add new users
- Currently the entire PNG road network is a single security zone

RAMM help videos

https://go.ramm.com/?help=UserManagement

https://go.ramm.com/?help=OrganisationManagementQuickStart

Get started

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Getting started with a new tool can seem like an overwhelming task. If you're not sure where to start, this page is for you.

Before you begin, we suggest you check out our Intro to KnowledgeOwl to learn quick basics. Or just start building and learn it as you go along!

Building your knowledge base

- Set up your knowledge base's basic configuration.
- Set up your knowledge base URL/domain.
- Adjust the look and feel to fit your branding needs.
- Determine who can access your knowledge base, and how.
- Configure and enable the features you'd like to use.
- Determine appropriate author roles and permissions. (If you're a solo writer, skip this!)
- Create some categories and articles, and share your knowledge base with the world! (Or at least a close friend. ☺)

This page is an abbreviated version of our fullGetting Started Guide.

Orientation

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Welcome to your new knowledge base! We're glad to have you here.

We've created some content here to answer questions you might have and share some different configuration options:

- **Get Started**: This is an abbreviated version of our whole Getting Started Guide, which walks you through some of the settings and configurations you may want to tweak to test things out. This is a custom content category, so it's a category that behaves more like an article.
- **Get help**: Find all the ways you can request help during and after your trial. This is a blog style category.
- **Evaluation resources**: Check out reviews from other KnowledgeOwl authors, learn how to connect with us outside of your trial, and learn how to delete all this content once you don't need it. This is a default category.
- **Trial FAQs**: Here, we provide answers to some of the questions we get asked most often by trial authors. This is a topic display category using the accordion layout. You can ignore this category if you created this new knowledge base as part of an existing paid account!
- **Welcome video with tips to get started**: Watch a short video where we'll give you some tips on how to get going with your knowledge base.

Use the Help menu

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On every page in app.knowledgeowl.com, you'll see a **Help** menu in the upper right. It includes these options:

- **In-App Help**: Clicking this will open our contextual help widget to suggest Support KB pages relevant to the page you're currently on, let you search for other resources, etc. (The help widget is powered by our Contextual Help Widget.)
- **Support KB**: Clicking this will open a new tab that will take you to the homepage of our Support KB.
- **Status Page**: Clicking this will open a new tab displaying our status page, so if you have slowness or an error, you can check if we already have an incident related to it that we're working on. (You can also subscribe to our status page there, so you can get emails when we do have incidents.)
- **Contact Support**: clicking this will open our contextual help widget directly to the Contact tab, so you can send us a question or request from wherever you are. This helps capture where you are when you submit the question, which saves you the effort of copying a link. One of our support owls will get back to you!

Check our Support knowledge base

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You can browse and search our Support knowledge base at any time using the**Help** menu in the upper right of app.knowledgeowl.com and selecting **Support KB** (or you can head straight to support.knowledgeowl.com, your choice!).

Check our YouTube channel

06/09/2023 9:09 am +10

We recently started doing a series of drop-in video sessions on select topics. Check out the recordings we have available at our YouTube channel.

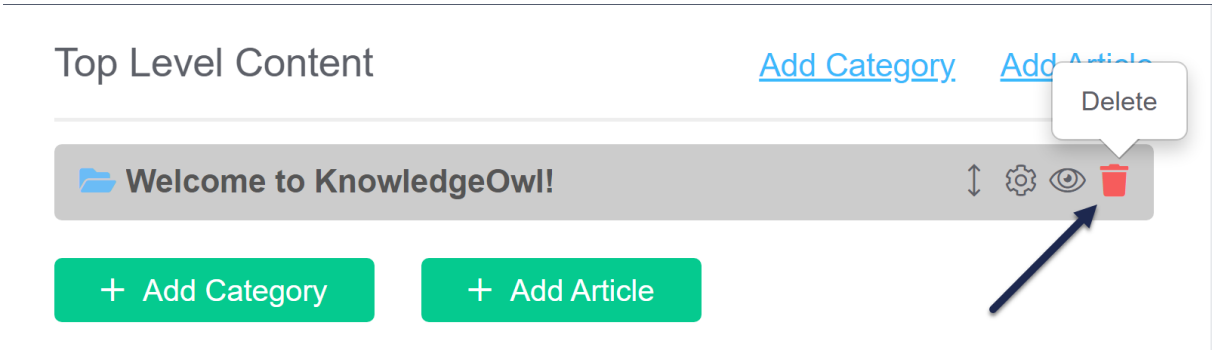
How to delete this content

06/09/2023 9:09 am +10

Once you don't need any of this content any more, you can quickly clear it out of your knowledge base:

1. In **Knowledge Base > Articles**, hover over any of the categories we added.

2. Click the trashcan icon that appears to the right of the category title:



3. In the confirmation pop-up, confirm you'd like to delete.

Deleting the top-level category will delete all of its subcategories and articles, so it will be as if we never existed. (Though if you deleted something you need, you can head over to **Manage > Articles**, open the Deleted filter, and still access it from there!) You can do this for any/all of the content we added.

Contact support

06/09/2023 9:09 am +10

You can contact our support owls in several ways:

- In app.knowledgeowl.com, click the **Help** link in the upper right and select **Contact Support**. This will open our contextual help widget so you can submit your question.
- In support.knowledgeowl.com, click the **Contact Support** link in the upper right. This automatically opens the **Contact** tab where you can submit your question.
- Email support@knowledgeowl.com with your questions.

Schedule a 15-minute discovery call

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This is a URL Redirect article. You can use URL Redirects to send your end-readers to files or resources stored within KnowledgeOwl or anywhere else on the internet. Open this article and you'll see!

What features are available during my trial?

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Our entire feature set is available at all plan levels, and we also make it available in your trial.

The one exception to the feature set is our bulk reader import. We limit this during trials since it can be used to send out large volumes of emails and we've had a few bad actors in the past. If you'd like to test this feature during your trial, let our support owls know.

What are my pricing and plan options?

06/09/2023 9:09 am +10

For full details on our plans and pricing, see:

- Plans
- Pricing

For other plan or pricing questions not answered there, see: Plans and trials FAQ.

All trial accounts come it at our Flex plan level. If you'd like to update to Business or Enterprise, see How do I update my trial to the Business or Enterprise plan? for more details.

How do I add more authors to my trial?

06/09/2023 9:09 am +10

You can add author seats in your KnowledgeOwl trial at any time.

To add more authors to your trial, you'll:

- Update **Your Account > Account** to increase the number of Authors, then click **Update** in the **Plan Cost** section to save those changes
- Create the author in **Your Account > Authors**

See more detailed instructions in our Support knowledge base:How do I add more authors to my trial?

What role should I use for the new authors?

When you sign up for a trial, your account is created with:

- A **Login Type** of Self administered username and password
- The **Full Account Admin** box checked
- In Knowledge Base Access, the **Editor** role on the knowledge base you created

If you want your other authors to have the same permissions as you, you can copy these exactly. The Full Account Admin box is not required for people to test or use the functionality. The **Writer** role has fewer permissions than the **Editor**, and you can also create custom roles if you'd like. See more detailed information on the default Editor and Writer role permissions as well as how to create custom author roles in our Support knowledge base: Author roles & custom roles

How do I add more knowledge bases to my trial?

06/09/2023 9:09 am +10

You can add more knowledge bases in your KnowledgeOwl trial at any time.

To add more knowledge bases to your trial, you'll:

- Update **Your Account > Account** to increase the number of Knowledge Bases, then click **Update** in the **Plan Cost** section to save those changes
- Head to the main dashboard to Create an additional knowledge base
- Assign that knowledge base to other users in their **Knowledge Base Access**

See more detailed instructions in our Support knowledge base:How do I add more knowledge bases to my trial?

How do I extend my trial?

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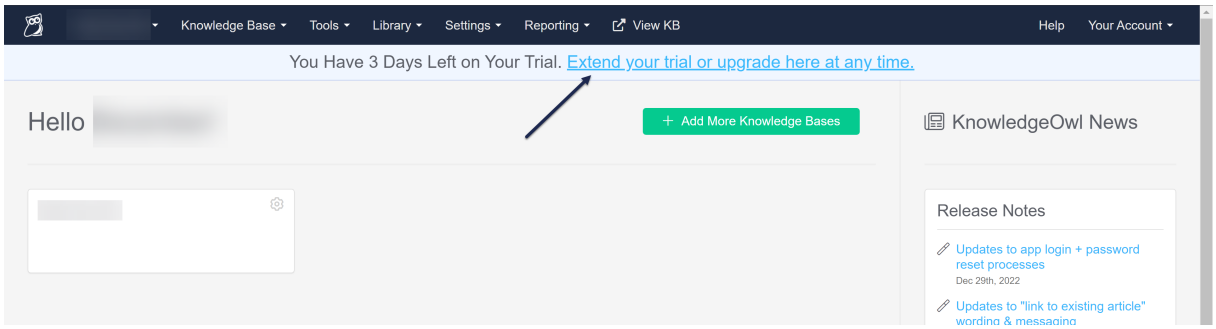
Your initial trial is good for 30 days. There are a couple points at which you can extend your trial:

After the first 15 days

At any point after your first 15 days, you can extend your trial by an additional 30 days. Once you hit this point in your trial, the message on the dashboard when you log in adjusts to: You have xx Days Left on Your Trial. Extend your trial or upgrade here at any time. We recommend extending near the end of your trial so you get the most amount of time possible. 😉

1. Click the **Extend your trial or upgrade here at any time** link on the dashboard.



2. This will take you to **Your Account > Account**. Near the top of the page, you'll see an informational callout that will tell you how many days you have left and give you the option to click to extend your trial for another 30 days:

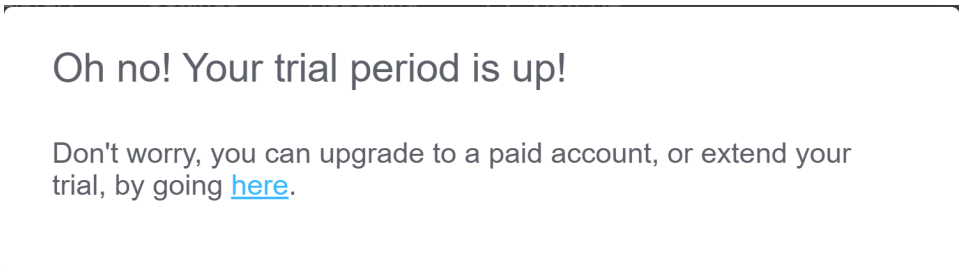
3. Click the **Click here to extend your trial for another 30 days** link in the message.

4. You'll get a quick dropdown confirmation and the message should update to say: "Your trial will expire in 30 days."

If you've already extended your trial by 30 days, and you still need more time, and let us know how much more time you need, and we can extend it further.

After your trial expires

Once your trial has expired, the next time you log in you'll see this pop-up:



To extend your trial by 30 days:

1. Click the underlined **here** link, which will take you to **Your Account > Account**.
2. You'll see an option to extend your trial by another 30 days:
3. Click the link to extend your trial by 30 days.

If you've already extended your trial by 30 days, and you still need more time, and let us know how much more time you need, and we can extend it further.

What happens when my trial expires?

06/09/2023 9:09 am +10

We understand that evaluating knowledge bases can take time, and sometimes 30 days is just not enough time to do a full evaluation--or priorities change and you're asked to prioritize something else instead.

When your trial expires, your trial information will continue to exist for at least **6 months** past the date of expiration.

This includes:

- Your own author account and permissions, plus any additional author accounts you created
- Any knowledge bases you created, plus all the content they contain
- Any other settings changes you made in your trial

You can extend your trial to regain access to your trial and all the work you've done, so you can pick right back up where you left off.

Or you can choose to subscribe to make the relationship more permanent--see How do I pay for my account? in our Support knowledge base for more information!

What happens when I subscribe to KnowledgeOwl?

06/09/2023 9:09 am +10

We were hoping you would ask this question. 😊

When you decide to subscribe to KnowledgeOwl, you can choose to pay in-app with a credit card (monthly or annually) or set up an annual invoicing process. See How do I pay for my account? for more information on these billing options.

We don't want you to lose all the work you've done during your trial, so once you subscribe, we keep all the content, authors, and changes you've already made. But you're welcome to wipe them all and start fresh if you want!

What if we had multiple trial accounts?

While you can add more authors to your trial at any time, sometimes different members of your team may have signed up for trials independently, so there may be multiple accounts.

If one of these accounts has everything you want, use that account to subscribe from.

If you need a knowledge base or author account migrated from a separate trial into your main account, click the **Help** link in the upper right of app.knowledgeowl.com and let us know what you need moved. Our support owls should be able to get things moved around so that your subscribed account has what it needs.

Welcome video with tips on getting started

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Knowledge Types

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This article provides an introduction to the different knowledge types used in this Knowledge Base as well as some pointers on how to write them and what can be included.

Knowledge Types are associated to articles by using 'Tags' in KnowledgeOwl.

Policy

A policy sets our the organizations intention and / or rules for different situations.

> A policy should be clear on who it applies to and under what situation or activity. For example, in this situation then do this .....

Process

A process is a sequence of (procedural) steps for accomplishing an activity and its outcome. The process should be supported by documenting its inputs, outputs, constraints and the systems supporting it.

> In most cases a process should be provides as a workflow diagram at the top of a Topic Display Category with each step described as a procedure article beneath it.

Processes, focus on the **who**, **what** and **when** of an activity with particular emphasis on work relationships and decision making outcomes.

Unlike procedures, processes do not include job related detail and are therefore higher-level in nature.

Procedure

A procedure is a sequence of numbered steps for accomplishing a task. Sometime also referred to a Standard Operating Procedure (SOP).

> In most cases, introduce a procedure with an introductory sentence. This introductory sentence should provide context to the reader that isn't part of the section heading.

Note a procedure is not a step by step guide on how to use a system. It is assumed that the person has the system skills to carry out the steps of the procedure.

Form (including checklists and worksheets)

Forms are used to support a procedure or occasionally a policy. These usually require the entering of information like an application form and a register of information.

Forms focus on providing practical aids for helping to undertake a procedure or manage information.

A form can also be a checklist where the user ticks off information as they work through an activity.
A form can also be a worksheet where the user completes questions, usually in a training situation.

Plan

Plans are used as a detailed type of Procedure that provides step by step instructions that relates to a specific type of event and usually for a specific location.

Plans support the standard operating procedures and as they are more specific and localized usually take precedent when necessary.

Plans focus on the working detail prepared in advance for a specific or generic event such as a planned event or a specific incident or disaster scenario.

Manual (including codes of practice, guideline and best practice manuals)

Manuals are used to provide detailed instructions or guidelines for best practice. These can include system manuals, training manuals, facility manuals, maintenance manuals as well as codes of practice, guidelines and best practice manuals.

Best practice and guideline manuals are not formal policy to follow as they can be open to interpretation.

Work Instruction (Systems)

A step by step guide how to achieve a specific task in a given system.

Guide

A guide is usually a practical document for users, that gathers together relevant process and procedures along with work instructions and system information to carryout a nominated area or activity of work.

While this might just be an aggregation, for convenience, of the individual parts mentioned above, it could also be a stand alone document aimed at particular users (e.g. an external consultant).

A guide should provide quick and easy to use instructions for achieving a specific task or to make a decision. They are simple job-aids that can combine instructions on both procedures and system use at the same time.

Agreements (including contracts)

Agreements are used to document the agreements between two or more parties. This could range from a high-level Memorandum of Understanding through to a detailed support or maintenance contract.

Specification

Specifications set out technical requirements or expectations for an area or activity.

They are usually produced by outside organizations or the wider business for use by internal and external staff.

Register

Registers are usually a spreadsheet or table of information that needs to be managed on an ongoing basis. For example, contacts register, risk register and quality documents register)

Report

A report is a document prepared at the end of an activity to usually provide an overview of the methodology undertaken and a summary of the results. For example a report can be provided at the end of a network condition survey or an investigation in to the rate of deteriation of bridges.

> Created by either external consultants or internal staff, reports should be stored as knowledge when they have a long term benefit like documenting research that underpins and supports why decisions are made in a certain way or capturing the details behind the development of a prioritisation method / algorithm.

Other Information

This type is just a catch all for when information doesn't fit into any other Knowledge Types.

Work In Progress

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To not restrict information being made available, the author can use "WIP" under a section header that signifies that the section is still a 'Work in Progress'. This allows the rest of the content to be made available to users sooner, rather than waiting for the whole article to e completed before publishing. In this case the Article should have a publishing status set to "Needs Review".