Lab Guide

Drive Service Efficiency With Knowledge

Semhar Yemaneab & Paul McConnon

Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

Lab Sponsored by Microsoft Azure



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Lab Goal

This lab explains the changes to menus and modules associated with Knowledge Management v3.

It also presents additional details on each of the menus and modules reviewed in the lab.

Lab 1.0 New Menus and Modules

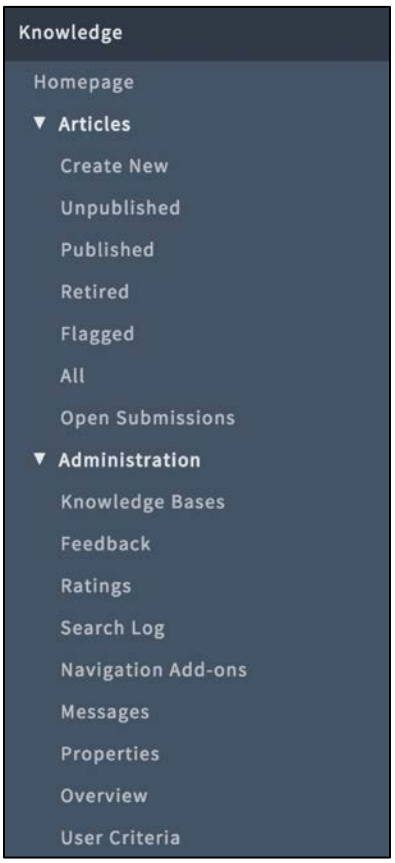
Log on to Your Training Instance

1. Navigate to the unique instance URL you received.
2. Log on with the provided credentials.

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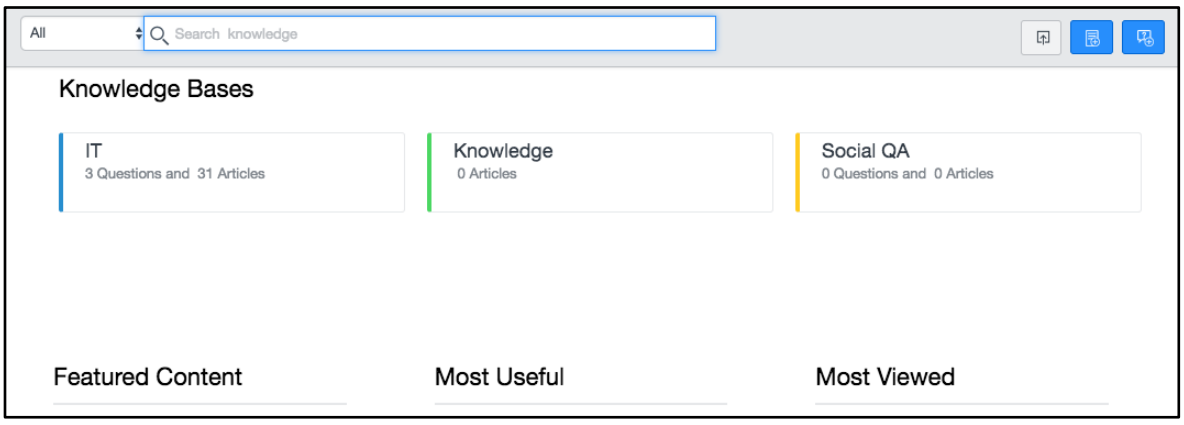
The Knowledge Homepage

1. Navigate to **Knowledge > Homepage**.



2. Notice there are three Knowledge Bases available out-of-the-box.

3. Your screen should look like the example.



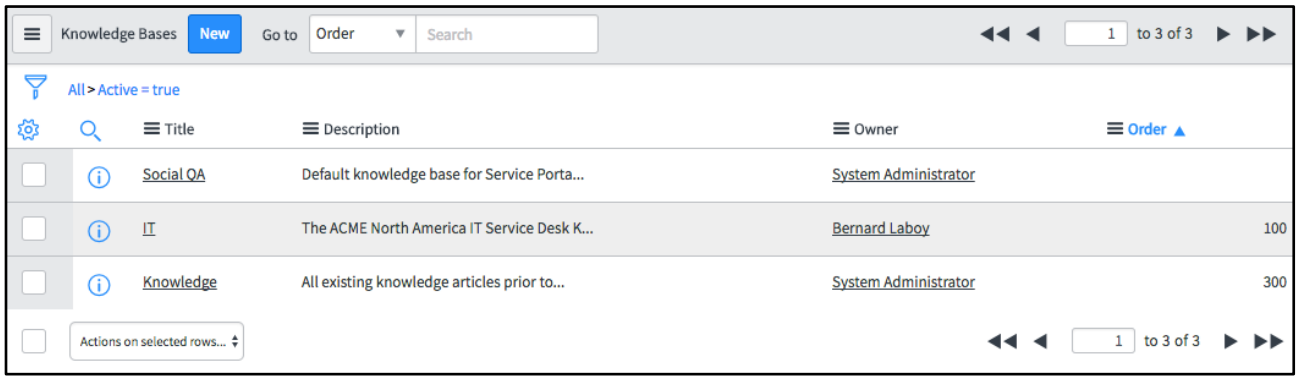
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Knowledge Bases Module

1. Navigate to **Knowledge > Knowledge Bases**.
2. Notice the same three Knowledge Bases available out-of-the-box.

Lab Success Verification

1. Your screen should look like the example.



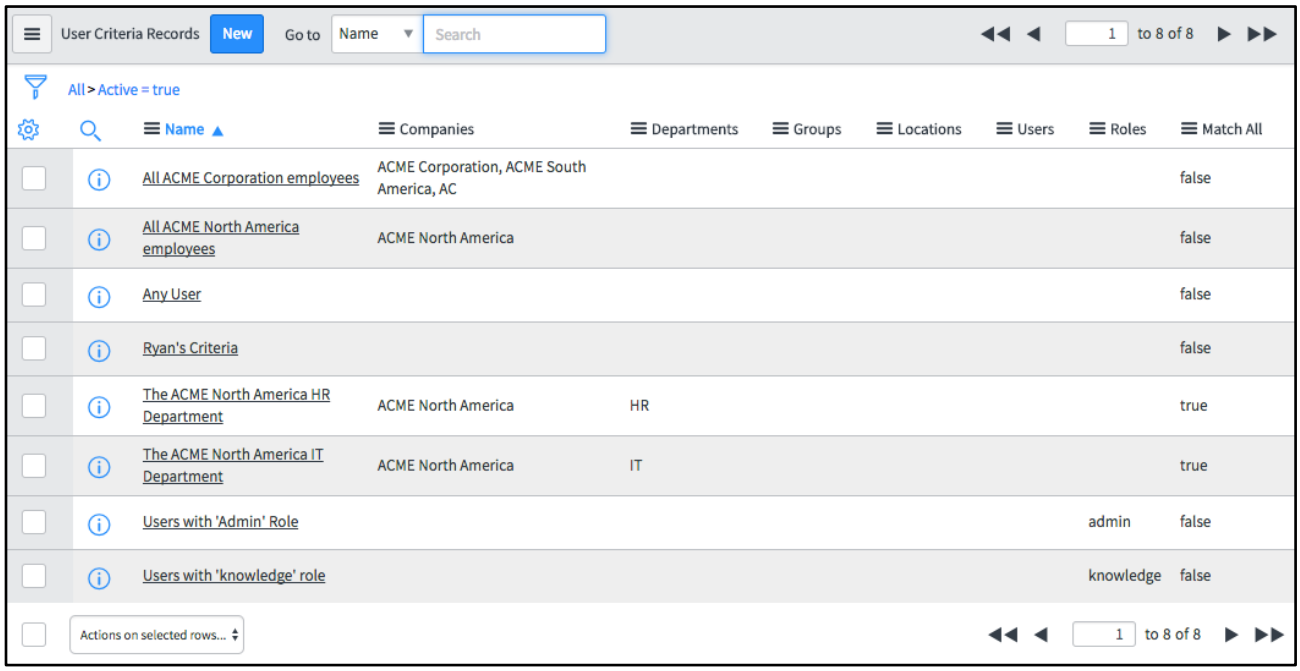
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User Criteria Module

1. Navigate to **Knowledge > Administration > User Criteria**.
2. Notice there are eight out-of-the-box User Criteria available.

Lab Success Verification

1. Your screen should look like the example.



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Lab 2.0
User Criteria

Lab Goal

This lab explains how to create User Criteria that limit viewing and editing content in specific Knowledge Bases. The lab covers these setup criteria:

- **Create New Role-Based User Criteria**—to assign viewer and edit rules based on role-based user criteria
- **Create New Multi-Attribute User Criteria**—to assign viewer and edit rules based on multi-attribute user criteria
- **Create User Criteria for Individual Users**—to assign viewer and edit rules based on individual user criteria

Create New Role-Based User Criteria

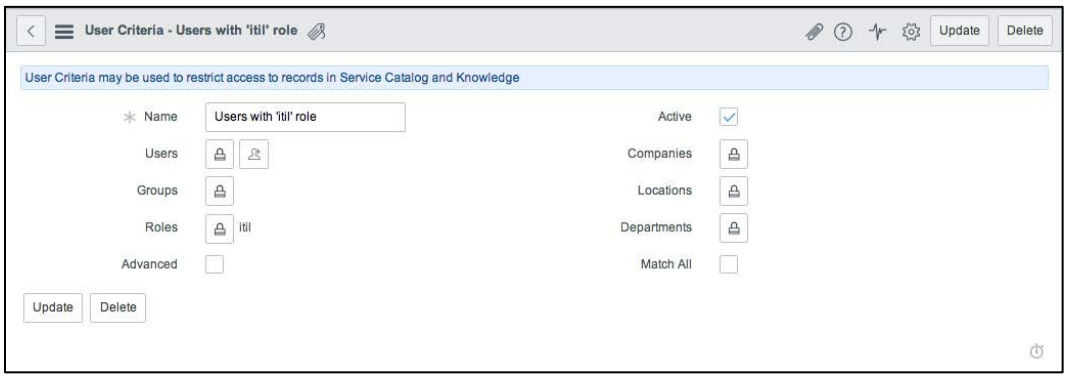
1. Navigate to **Knowledge > Administration > User Criteria**.
2. Click **New**.
3. On the **User Criteria Form**, enter the following:

   Name: **Users with 'itil' role**
   Roles: **itil**
   Ensure **Active** box is **checked**
4. Right-click in the header and click **Save.**

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Lab Success Verification

1. Your screen should look like the example.



Create New Multi-Attribute User Criteria

1. Navigate to **Knowledge > Administration > User Criteria**.
2. Click **New.**
3. On the **User Criteria** form, enter the following:

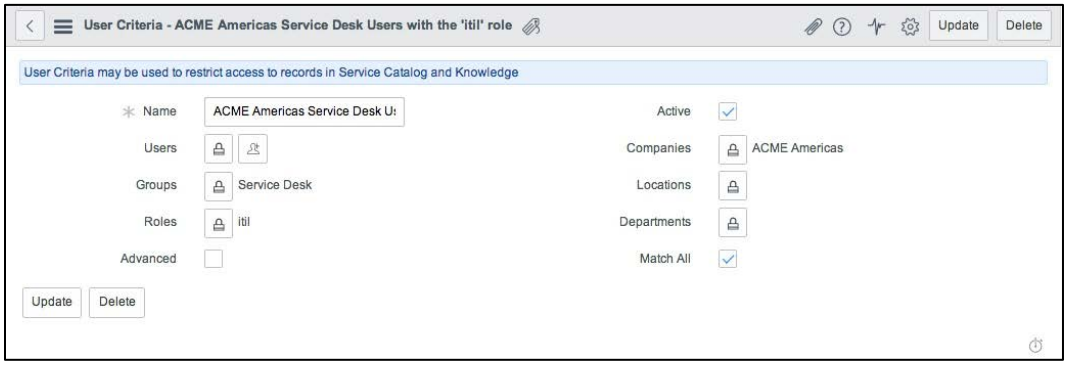
   Name: **ACME Americas Service Desk Users with the 'itil' role**
   Groups**: Service Desk**
   Roles: **itil**

   Companies: **ACME Americas**
   Ensure **Active** box is **checked**
   Ensure **Match All box** is **checked**
4. Right-click in the header**, a**nd click **Save.**

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Lab Success Verification

1. Your screen should look like the example.



Create User Criteria for Individual Users

1. Navigate to **Knowledge > Administration > User Criteria**.

2. Click **New**.

3. On the **User Criteria** form, enter the following:

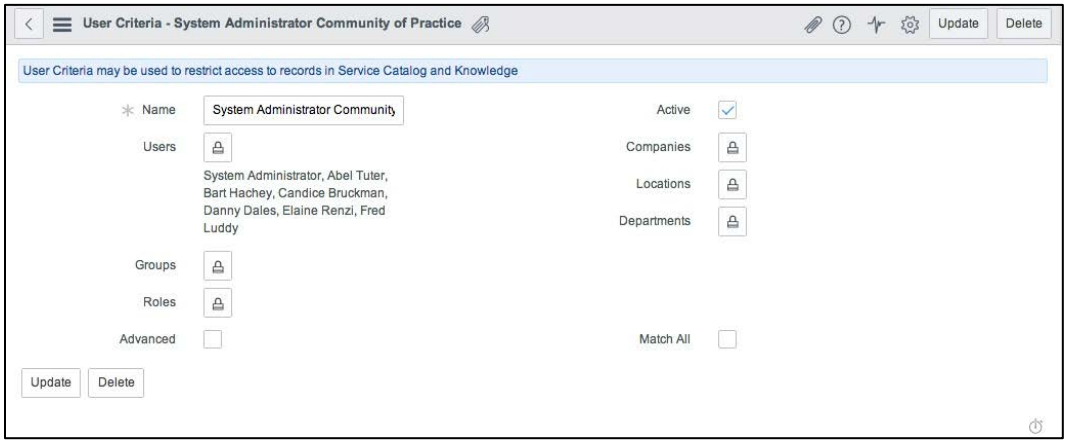
   Name: **System Administrator Community of Practice**
   Users: **System Administrator, Abel Tuter, Bart Hachey, Candice Bruckman, Danny Dales, Elaine Renzi, Fred Luddy**
   Ensure **Active** box is **checked**

4. Right-click in the header, and click **Save.**

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Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 3.0 Create Knowledge Bases

This lab explains how to create the following new Knowledge Bases for appropriately segmented content.

- **Create a Knowledge Base with Unlimited Viewing and Limited Editing**—to create a Knowledge Base with publicly accessible content, to which only identified users can contribute
- **Create a Knowledge Base with Different Viewing and Editing**—to create a Knowledge Base with limited editing (only those identified in **Can Contribute**) and limited viewing (only those identified in **Can Read** AND **Can Contribute**)
- **Create a Knowledge Base with Equally Limited Viewing and Editing**—to create a Knowledge Base with highly restricted limitations for **Can Read** and **Can Contribute**

Create a Knowledge Base with Unlimited Visibility and Limited Edit Ability

1. Navigate to **Knowledge > Administration > Knowledge Bases**.
2. Click **New**.
3. On the **Knowledge Base** form, enter the following:

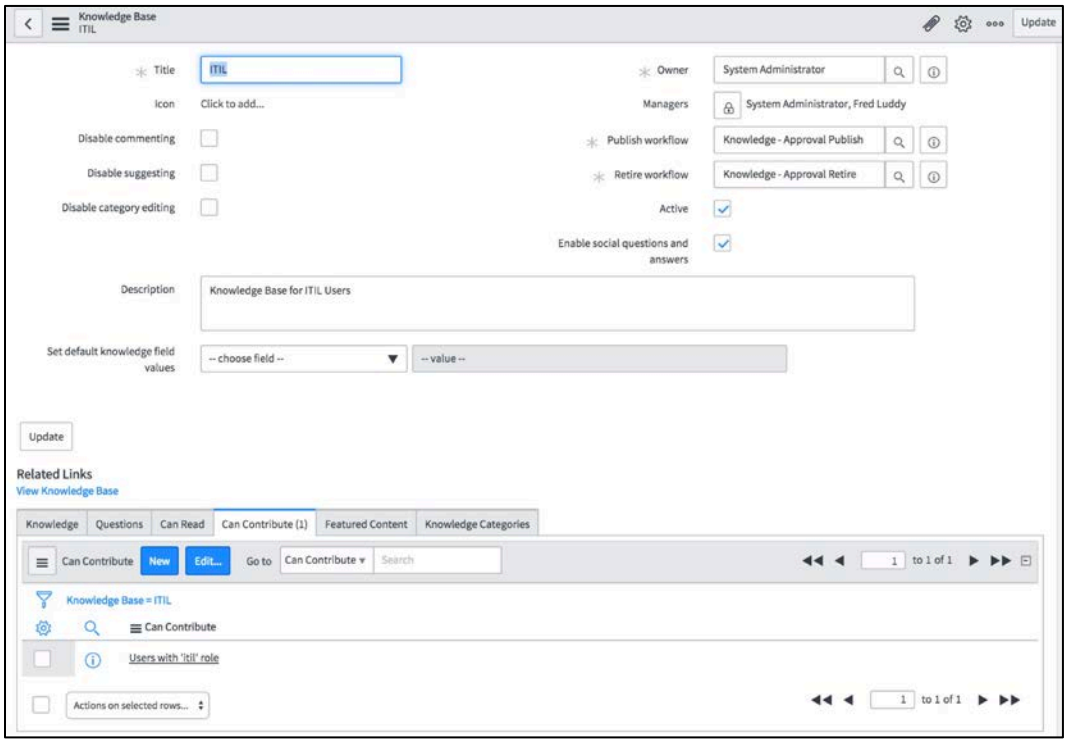
   Name: **ITIL**
   Owner: **System Administrator**
   Managers: **System Administrator, Fred Luddy**
   Description: **Knowledge Base for ITIL Users**
   Publish workflow: **Knowledge – Approval Publish**
   Retire workflow: **Knowledge – Approval Retire**
   Set default knowledge field values: **Article type > HTML**
   Ensure **Active** box is **checked**
   Ensure **Enable social questions** and **answers** box is **checked**
4. Right-click the header, and click **Save**.
5. Open the **Can Contribute** tab.
6. Click **Edit**.
7. Select **Users with 'itil' role** from **Collection** on the left and add to the **Can Contribute** list on the right.

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8. Click **Save.**

Lab Success Verification

1. Your screen should look like the example.



Create a Knowledge Base with Different Viewing and Editing

1. Navigate to **Knowledge > Administration > Knowledge Bases**.

2. Click **New.**

3. On the **Knowledge Base Form**, enter the following:

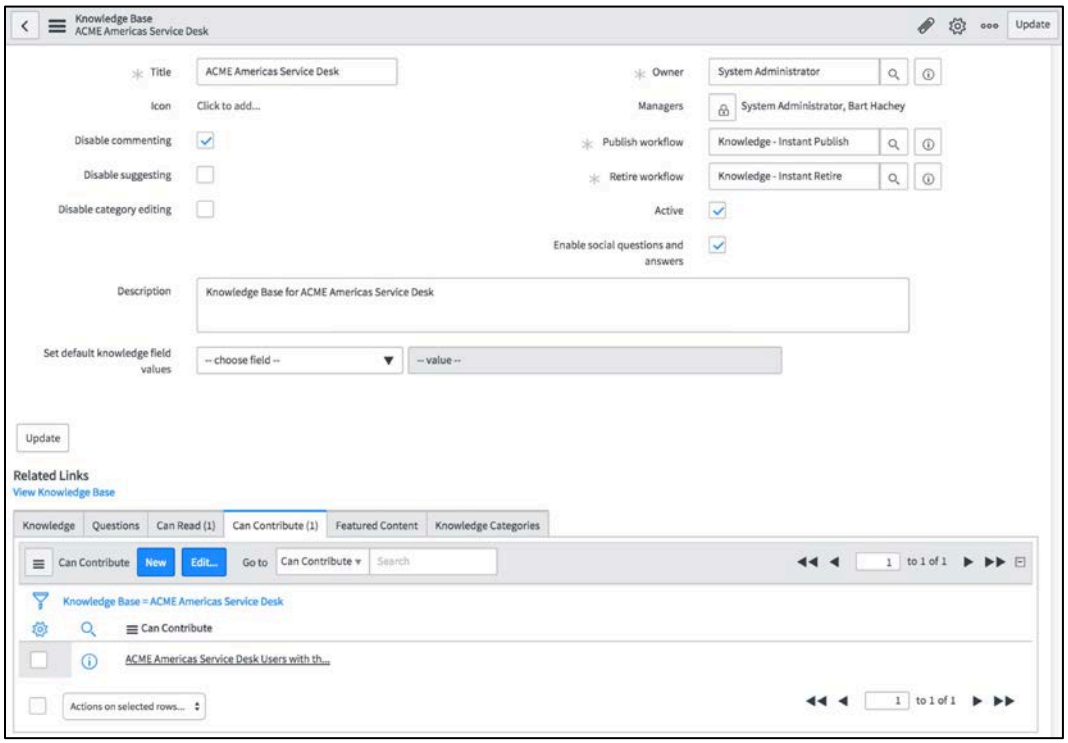
   Name: **ACME Americas Service Desk**
   Disable **commenting: Checked**
   Owner: **System Administrator**
   Managers: **System Administrator, Bart Hachey**
   Description: **Knowledge Base for ACME Americas Service Desk**
   Ensure **Active** box is **checked**
   Ensure **Enable social questions and answers** box is **checked**

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4. Right-click in the header, and click **Save.**
5. Open the **Can Read** tab.
6. Click **Edit.**
7. Select **Users with the itil role** from the **Collection** on the left, and add to the **Can Read** list on the right.
8. Click **Save**.
9. Open the **Can Contribute** tab.
10. Click **Edit**.
11. Select **ACME Americas Service Desk Users with the itil role** from Collection on the left, and add to the **Can Contribute** list on the right.
12. Click **Save.**

Lab Success Verification

1. Your screen should look like the example.



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Create a Knowledge Base with Equally Limited Viewing and Editing

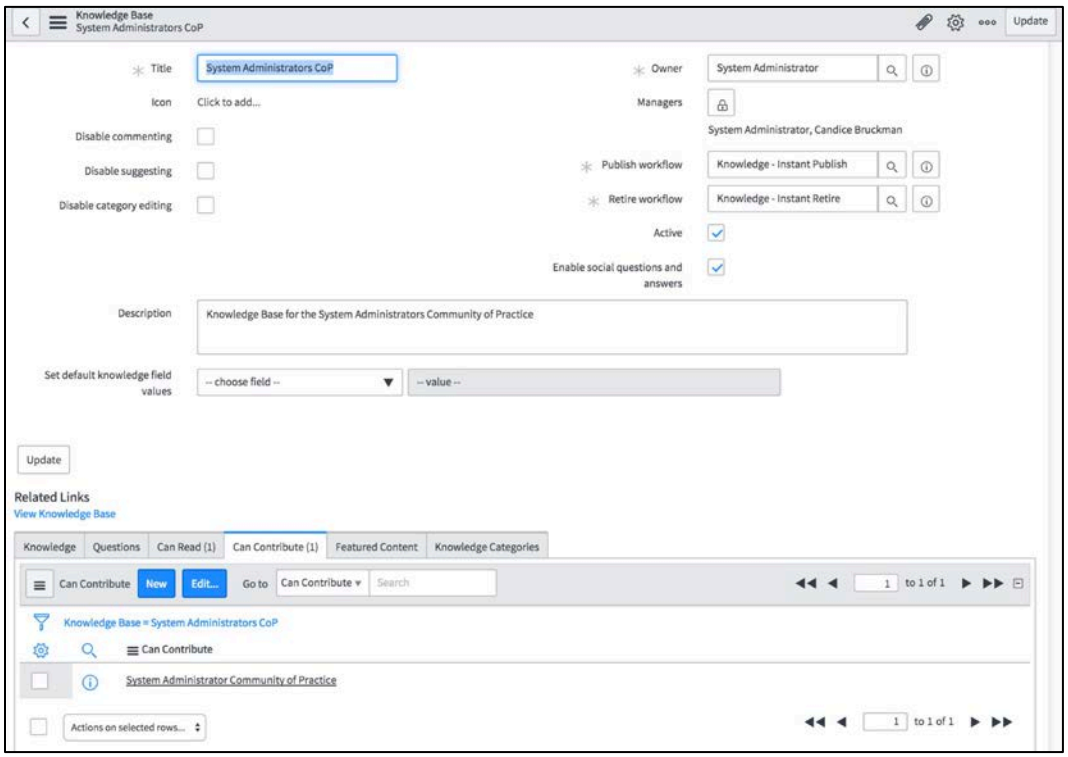
1. Navigate to **Knowledge > Administration > Knowledge Bases**.
2. Click **New**.
3. On the **Knowledge Base Form**, enter the following:

   Title: **System Administrators CoP**
   Owner: **System Administrator**
   Managers: **System Administrator, Candice Bruckman**
   Description: **Knowledge Base for the System Administrators Community of Practice**
   Ensure **Active** box is **checked**
   Ensure **Enable social questions and answers** box is **checked**
4. Right-click in the header, and click **Save.**
5. Open the **Can Read** tab**.**
6. Click **Edit**.
7. Select **System Administrator Community of Practice** from the **Collection** on the left, and add it to the **Can Read** list on the right.
8. Click **Save**.
9. Open the **Can Contribute** tab.
10. Click **Edit**.
11. Select **System Administrator Community of Practice** from **Collection** on the left, and add to the **Can Contribute** list on the right.
12. Click **Save**.

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Lab Success Verification

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Lab Goal

Lab 4.0 Category Structure

This lab explains how to create Categories within new Knowledge Bases using the following methods.

- Create Categories Manually, to add hierarchical Categories and Subcategories into Knowledge Bases manually

Create Categories Manually

1. Navigate to **Knowledge > Articles > Create New**.
2. Select Knowledge Base: **ITIL**.
3. Open the **Category Picker** by selecting the **magnifying glass** next to the **Category** field.
4. In the Category Picker, click the plus **(+)** sign at the bottom of the first column.
5. Type **Incident Management**, and press **Enter**.
6. Continue to create the following Categories in the first column, as completed in **steps 4** and **5**:

   Change Management
   Asset Management
   Knowledge Management

7. Highlight **Incident Management**, hover over the second column, and click the plus **(+)** sign at the bottom.
8. Add the following subcategories:

   Processes
   Procedures
   Best Practices

9. **Under Processes** add the following subcategories:

   Service Desk
   Development
   Escalation

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10. Add the same subcategories under **Procedures** and **Best Practices**.

    Your screen should look like the example.



11. Repeat **steps 7 through 9** for each of the remaining primary categories (Change Management, Asset Management, and Knowledge Management).

12. Click **OK**.

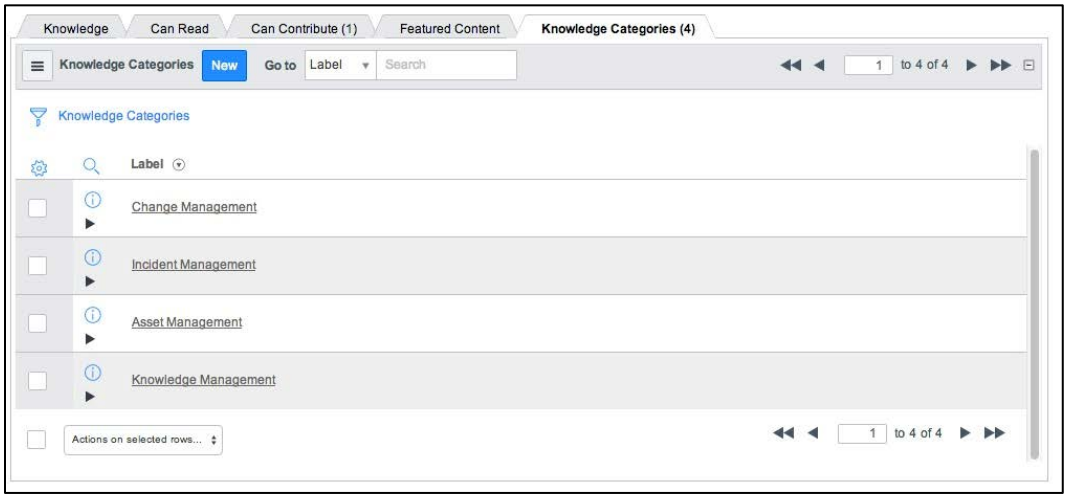
13. Navigate to **Knowledge > Administration > Knowledge Bases**.

14. Open **ITIL**.

15. Open the **Knowledge Categories** tab.

Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

This lab explains how to migrate content from one Knowledge Base to another using the following methods:

- **Migrate Individual Knowledge Articles**—move an article from one Knowledge Base into another Knowledge Base manually
- **Migrate Content with a Script**—move content from one Knowledge Base to another automatically using a script

Lab 5.0 Migrate Content

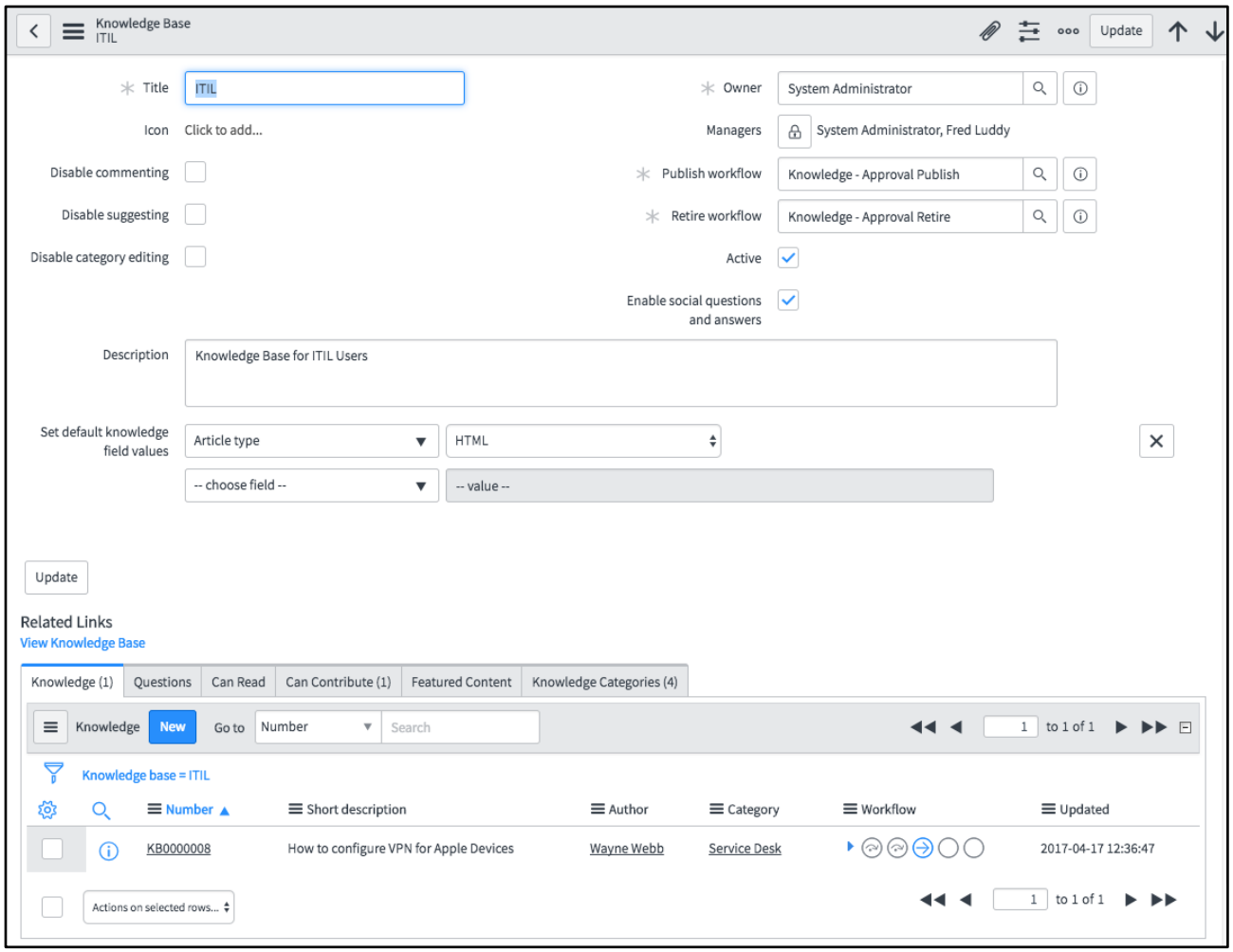
Migrate Individual Knowledge Articles

1. Navigate to **Knowledge > Administration > Knowledge Bases**.
2. Open **IT**.
3. On the Knowledge tab, filter for **Workflow = Published**.
4. Open **KB0000008 – How to configure VPN for Apple Devices**.
5. Change the Knowledge base from IT to **ITIL**.
6. Click the **magnifying glass** next to the **Category** field to open the **Category picker**.
7. Select **Incident Management> Best Practices> Service Desk**.
8. Click **OK,** then click **Update** on the Knowledge form.
9. Navigate to **Knowledge > Administration > Knowledge Bases**.
10. Open **ITIL**.

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Lab Success Verification

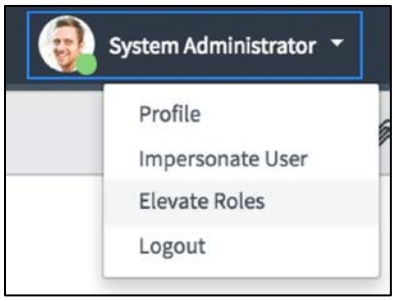
1. Your screen should look like the example.



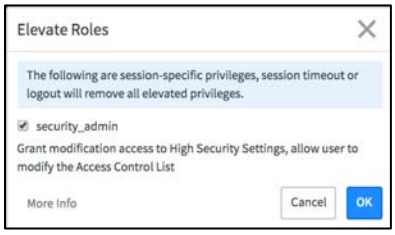
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Migrate Content with a Script

1. In the **Header Banner**, click on the user (System Administrator).
2. Select **Elevate Roles**.



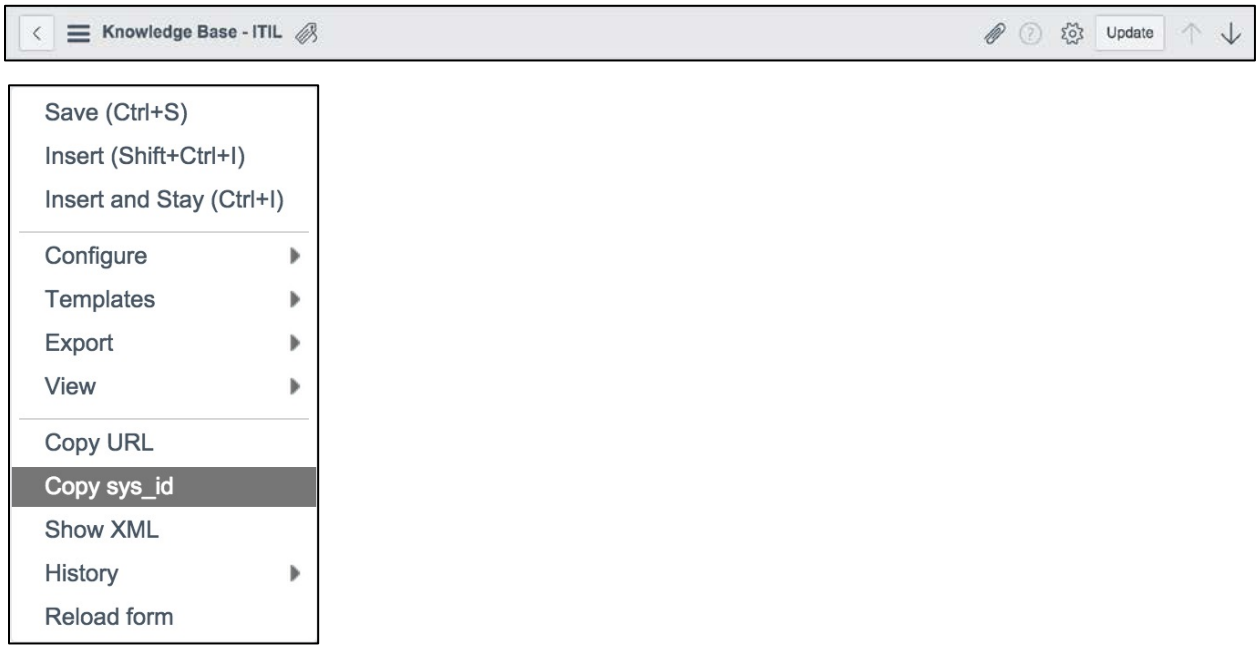
3. Ensure the **security_admin** box is **checked**.



4. Click **OK**.
5. Navigate to **Knowledge > Administration > Knowledge Bases**.
6. Open **ITIL**.

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7. Right-click the header bar and choose **Copy sys_id**.



8. Copy and paste the **sys_id** into a notepad.
9. Open **KB0000008 – How to configure VPN for Apple Devices**.
10. Click the **Information** icon of the **Category** field.



11. Right-click the header bar and choose **Copy sys_id.**

    Copy and paste the **sys_id** into a notepad**.**

12. **Navigate** to **System Definition > Scripts – Background**.

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13. Paste the following script into Run script (JavaScript executed on server) textbox:

```
var TARGET_KB_SYS_ID = 'a7e8a78bff0221009b20ffffffffff17';
var TARGET_KB_CATEGORY = '4008ed12ff0131009b20ffffffffffef';

var KB_ARTICLES_TO_MOVE = [
   "KB0000009",
   "KB0000006"
];

for (var i = 0; i < KB_ARTICLES_TO_MOVE.length; i++) {
   moveKBArticle(KB_ARTICLES_TO_MOVE[i]);
}

function moveKBArticle(kbNumber) {

   var kb = new GlideRecord('kb_knowledge');
   kb.setWorkflow(false);
   kb.addQuery('number',kbNumber);
   kb.query();
   if (kb.next()) {
      kb.kb_knowledge_base = TARGET_KB_SYS_ID;
      kb.kb_category = TARGET_KB_CATEGORY;
      kb.update();
      gs.print('Updated ' + kbNumber);
   } else {
      s.print('Did not find ' + kbNumber);
   }
}
```

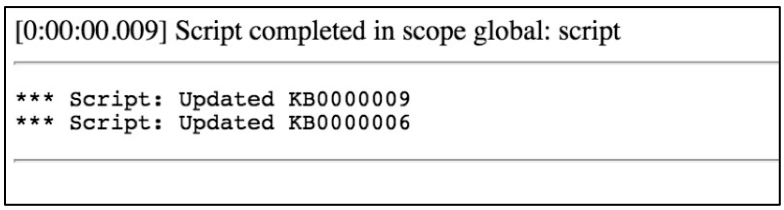
14. Replace **'a7e8a78bff0221009b20ffffffffff17'** with the sys_id copied in **step 4.**

15. Replace **'4008ed12ff0131009b20ffffffffffef'** with the sys_id copied in **step 9**.

16. Click **Run Script**.

Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 6.0 Create New Content

This lab explains how to create new Knowledge Articles using the following methods:

- **Create Knowledge in a Knowledge Base with Defined Categories and an Approval Workflow**—by creating Knowledge Articles in a set Knowledge Base that requires approval
- **Create Knowledge in a Knowledge Base with Undefined Categories and an Instant Publish Workflow**—by creating Knowledge Articles in a Knowledge Base with dynamic categories for instant publication

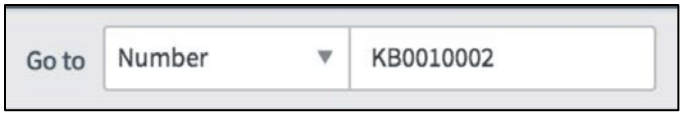
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Create Knowledge in a Knowledge Base with Defined Categories and an Approval Workflow

1. Navigate to **Knowledge > Articles > Create New**.
2. On the **Knowledge** form, populate the following:

   Knowledge base: **ITIL**
   Category: **Knowledge Management > Best Practices > Service Desk**
   Short Description: **When to Create Knowledge Articles**

   Text: **Creating Knowledge Articles can be time-consuming, and we know you can't create one for every Incident you resolve. It's best to create Knowledge Articles when there is a high likelihood of an issue recurring, and having content available could help you or your peers resolve an issue faster in the future. For example, if multiple users are calling in stating they've been locked out of their computers because their passwords have expired, and there are reproducible steps you could provide to make it easier for you or your peers to unlock a user's computer in the future, this would be a great candidate for a Knowledge Article.**
3. Right-click in the header, and click **Save.**
4. Copy the Article **Number**.
5. Click the **Publish UI Action**. This action sends you back to the full list of knowledge articles (kb_knowledge.list).
6. Paste the copied article number into the search box. Click **Enter**.

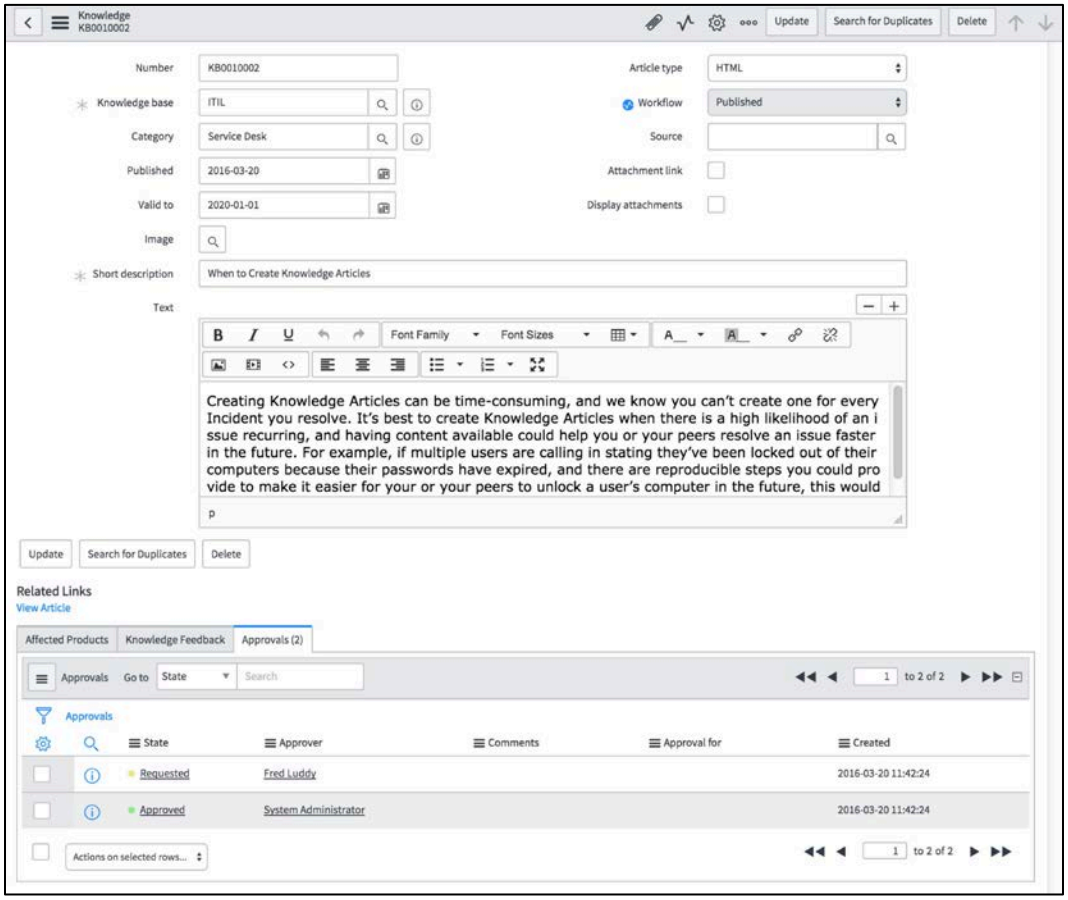


7. Reopen the newly created article and open the **Approvals** tab.
8. Notice approval requests are sent to the users identified as Managers in the ITIL Knowledge Base.
9. Double-click next to **Requested** for Approver **System Administrator**.
10. Change the drop-down selection to **Approved**, and click the **green** check mark.
11. Notice the **Workflow** field now shows the article is **Published**.

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Lab Success Verification

1. Your screen should look like the example.



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Create Knowledge in a Knowledge Base with Undefined Categories and an Instant Publish Workflow

1. Navigate to **Knowledge > Articles > Create New**.

2. On the **Knowledge Form**, populate the following:

   Knowledge base: **System Administrators CoP**
   Category: **System UI > UI Actions** (these Categories will need to be created)
   Be sure t**o click OK** when the Categories have been **created**
   Short Description: **UI Action Controls**
   Text: **You can create a UI action to provide any or all of these controls**
   A button on a form
   A context menu item on a form (appears when you right-click the form header)
   A related link in a form
   A button in the banner on top of a list
   A button at the bottom of a list
   A context menu item on a list (appears when you right-click the list)
   An menu item for the action choice list at the bottom of a list
   A related link at the bottom of a list

3. Right-click in the header, and click **Save**.

4. Copy the Article **Number**.

5. Click the **Publish UI Action**. This action sends you back to the full list of knowledge articles (kb_knowledge.list).

6. Paste the copied article number into the search box. Click **Enter**.

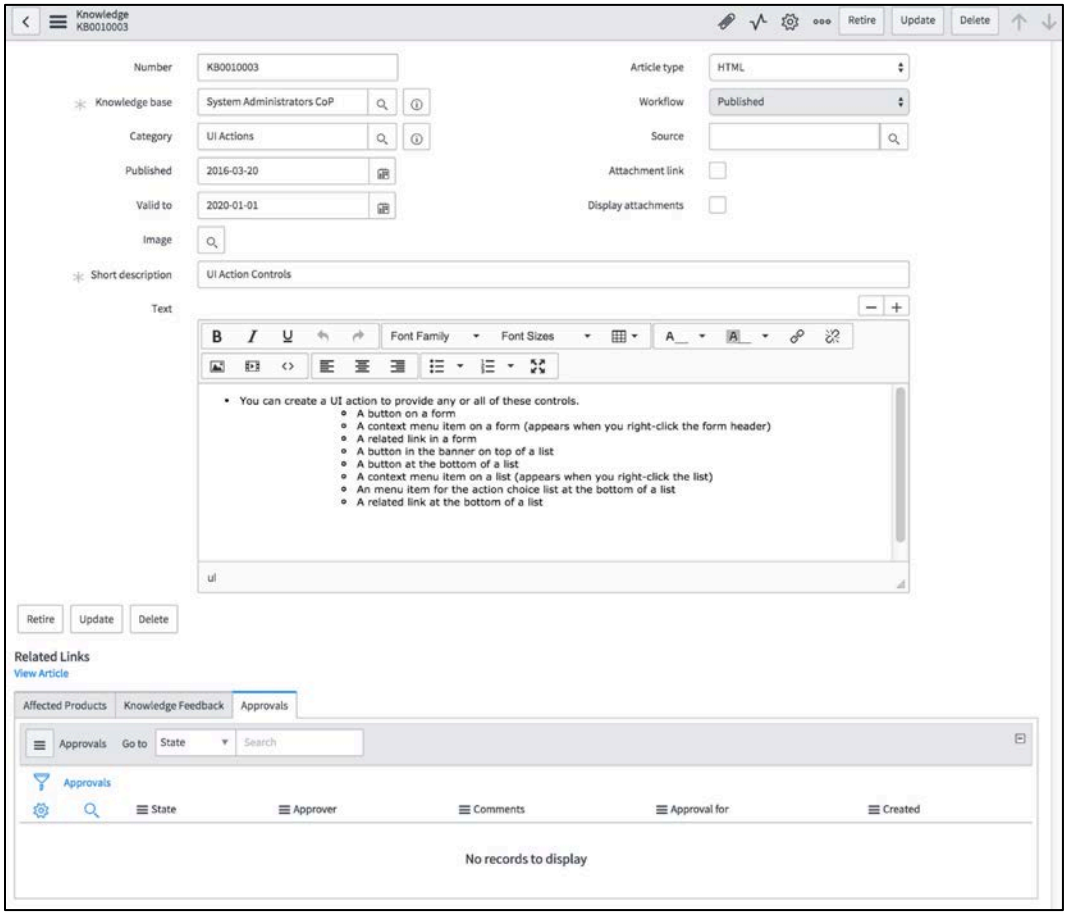
7. Notice on the Knowledge table that the article is now in a workflow state of **Published**.

8. Reopen the newly created Knowledge Article.

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Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 7.0 Featured Content/ Pinning

This lab explains how to identify featured content/ pinned articles using the following methods:

- **Identify Featured Content for a Homepage**—pinning articles to either the Knowledge Homepage or a specific Knowledge Base Homepage
- **Identify Featured Content for a Specific Query**—pinning articles to a specific keyword
- **Add Additional Featured Content for Specific Queries**

Identify Featured Content for a Homepage

1. Navigate to **Knowledge > Administration > Knowledge Bases**.
2. Open **ITIL**.
3. Open the **Featured Content** tab and select **New**.
4. On the **Knowledge keyword** form, click the magnifying glass next to the **Knowledge** field.
5. Set filter for **Knowledge Base IS ITIL** and **Workflow IS Published**. Click **Run**.
6. Select **KB0010002 – When to Create Knowledge Articles**.
7. On the **Knowledge keyword** form, click the lock. Then, click the magnifying glass next to the **Keywords** field.
8. Click **New**.
9. Type **mykb_homepage**.
10. Click **Submit** on both keyword pages.

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11. Your screen should look like the example.



12. Navigate to **Knowledge > Administration > Knowledge Bases**.

13. Open the **IT** Knowledge Base.

14. Open the **Featured Content** tab, noticing there are already two identified Featured Content articles.

15. To make these articles show up on the knowledge homepage, change their keywords from **homepage** to **mykb_homepage**.

16. Edit both keywords for the existing featured articles by clicking the **info icon** next to the article number.  Clicking the article number opens the article, not the keyword form.

17. Highlight the **keyword (homepage)** on the keyword form by clicking it.

18. After the keyword is highlighted, the editing icons become active. Click the  icon to remove the current keyword.

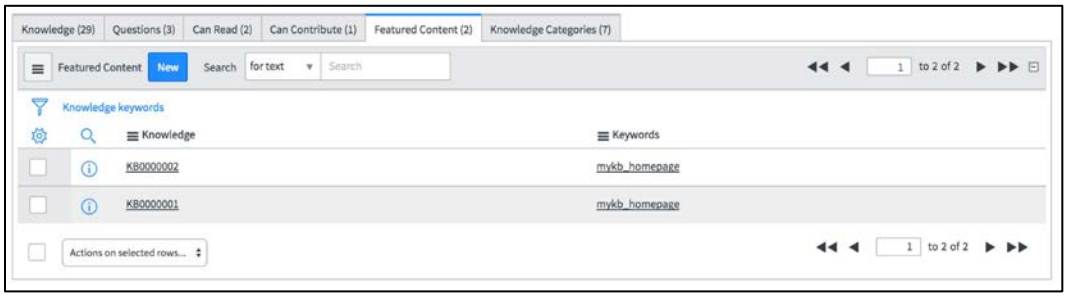
19. Start typing **mykb_homepage**. It becomes available in a drop-down list below the keywords field. Select it.

20. Click **Update**.

21. Complete the same steps for the other existing featured article.

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22. Your screen should look like the example.



23. Select **New.**

24. On the **Knowledge keyword** form, click the **magnifying glass** next to the **Knowledge** field.

25. Set filter for **Knowledge Base IS IT** and **Workflow IS Published**. Click **Run**.

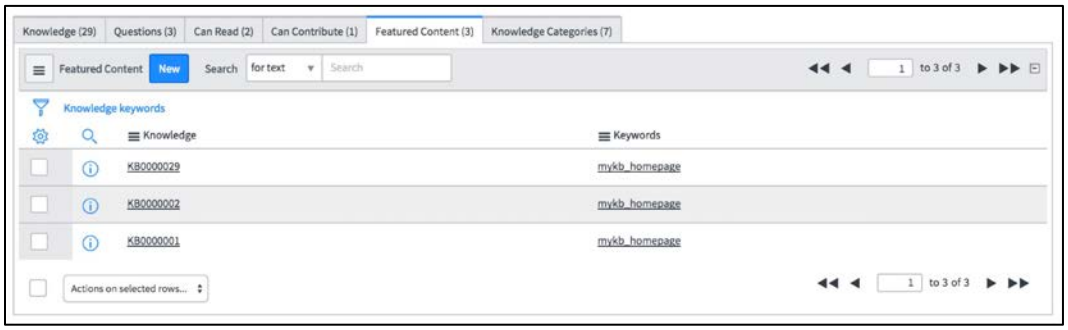
26. Select **KB0000029 – What is Spam?**

27. On the **Knowledge keyword** form, click the lock. Click the **magnifying glass** next to the **Keywords** field.

28. Select **mykb_homepage** and click **Submit**.

Lab Success Verification

1. Your screen should look like the example.



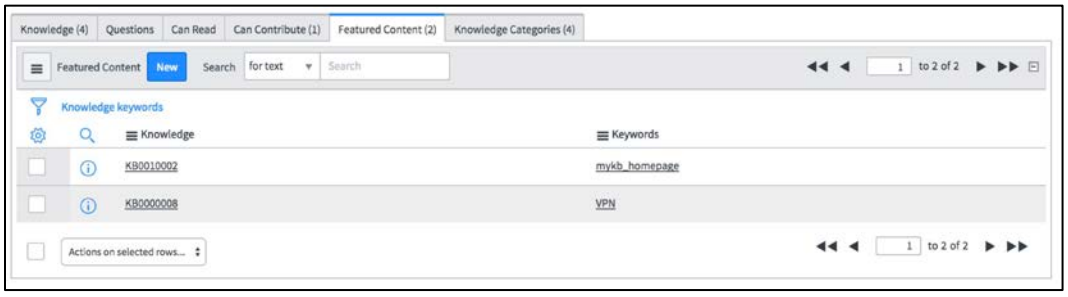
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Identify Featured Content for a Specific Query

1. Navigate to **Knowledge > Administration > Knowledge Bases**.
2. Open **ITIL**.
2. Open the **Featured Content** tab and select **New**.
3. On the **Knowledge keyword** form, click the **magnifying glass** next to the **Knowledge** field.
4. Set filter for **Knowledge Base IS ITIL** and **Workflow IS Published**. Click **Run**.
5. Select **KB0000008 – How to configure VPN for Apple Devices**.
6. On the **Knowledge keyword** form, click the **lock**. Click the **magnifying glass** next to the **Keywords** field**.**
7. Click **New**.
8. In the **Keyword** field, type **VPN**. Click **Submit**.
9. Click **Submit** on the **Knowledge keyword** form.

Lab Success Verification

1. Your screen should look like the example.



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Add More Featured Content for Specific Queries

1. Navigate to **Knowledge > Administration > Knowledge Bases**.
2. Open the **IT** Knowledge Base.
3. Open the **Featured Content** tab, and select **New**.
4. On the **Knowledge keyword form**, click the **magnifying glass** next to the **Knowledge** field.
5. Set filter for **Knowledge Base IS IT** and **Workflow IS Published**. Click **Run**.
6. Select **KB0000017 – What is the Windows key?**
7. On the **Knowledge keyword** form, click the **lock**. Click the **magnifying glass** next to the **Keywords** field.
8. Click **New**.
9. In the **Keyword** field, type **windows**. Click **Submit**.
10. Click **Submit** on the **Knowledge keyword** form.
11. Navigate to **Knowledge > Administration > Knowledge Bases**.
12. Open the **System Administrators CoP** Knowledge Base.
13. Open the **Featured Content** tab, and select **New**.
14. On the **Knowledge keyword** form, click the **magnifying glass** next to the **Knowledge** field.
15. Filter for **Knowledge Base IS System Administrators CoP** and **Workflow IS Published**. Click **Run**.
16. Select **KB0010003 – UI Action Controls**
17. On the **Knowledge keyword** form, select **mykb_homepage**. Click the **magnifying glass** next to the **Keywords** field.
18. Click **New.**
19. In the **Keyword** field, type **action**. Click **Submit**.
20. Click **Submit** on the **Knowledge keyword** form.

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Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 8.0 View Knowledge

This lab explains how to see how System Administrators and Users view knowledge bases, content, categories, and pinning, in the following scenarios:

- **Knowledge Homepage as System Administrator**—to view content as a System Administrator, who owns all Knowledge Bases
- **Knowledge Browsing as System Administrator**—to browse the Knowledge Content as a System Administrator, who owns all Knowledge Bases
- **Knowledge Searching as System Administrator**—to search for Knowledge Content as a System Administrator, who owns all Knowledge Bases
- **Knowledge Homepage as User**—to view content as a user limited by User Criteria
- **Knowledge Browsing as User**—to browse content as a user limited by User Criteria
- **Knowledge Searching as User**—to search for Knowledge Content as a user limited by User Criteria

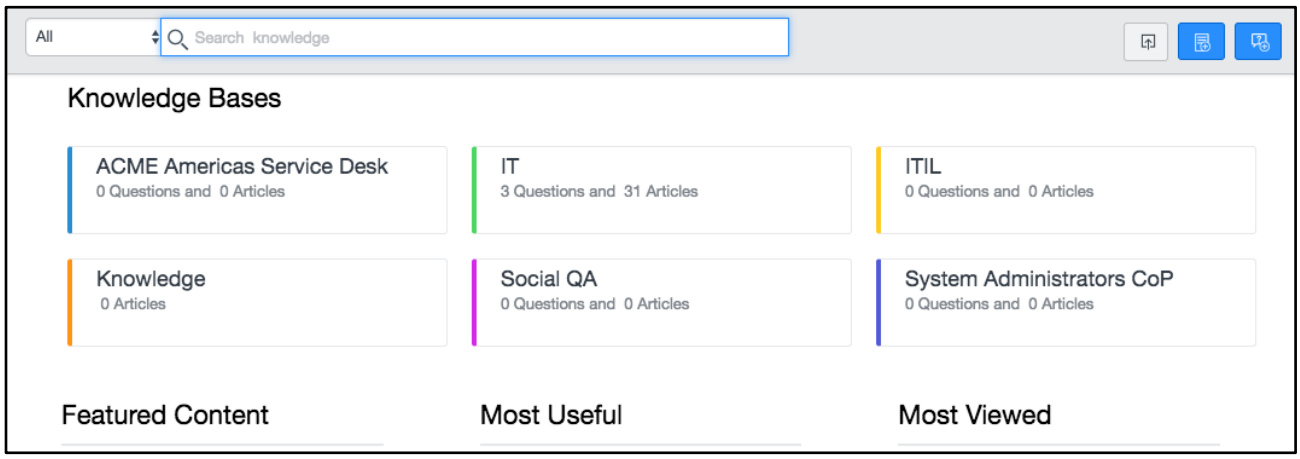
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Knowledge Homepage as System Administrator

1. Navigate to **Knowledge > Homepage**.
2. Notice, because you (System Administrator) are the owner of all five Knowledge Bases, you can view them all on the homepage.

Lab Success Verification

1. Your screen should look like the example.



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Browse Knowledge as System Administrator

1. Open the **ITIL** Knowledge Base and click **Incident Management**.
2. Notice the "How to configure VPN for Apple Devices," article moved from the IT Knowledge Base and is visible in the browsing frame.

   Your screen should look like the example.



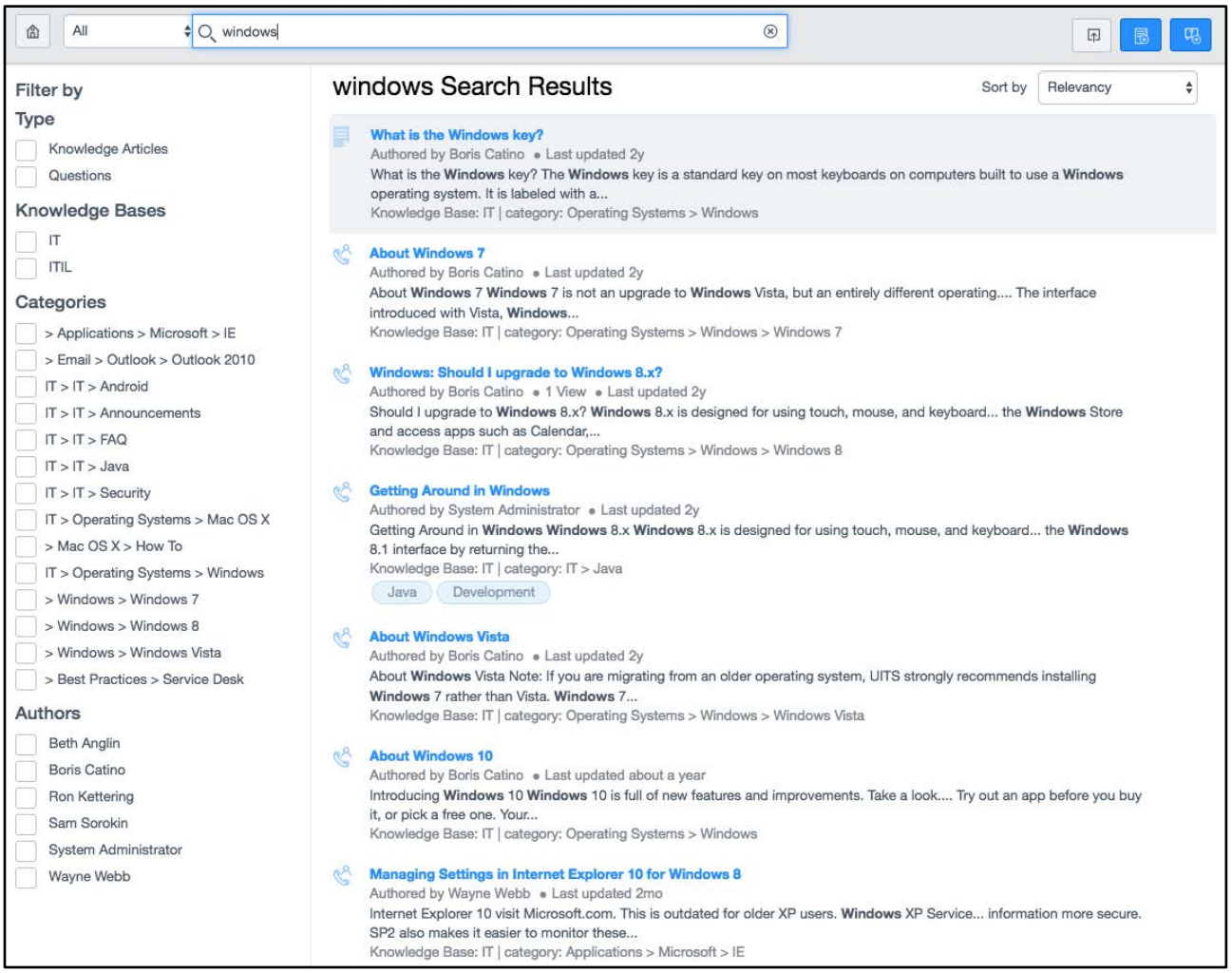
3. Open **"How to configure VPN for Apple Devices."**
4. Give the article **5 stars**, and answer **Helpful? Yes**.
5. Use the **in-frame Back** button to return to the ITIL Knowledge Base.
6. Change the Knowledge Base drop-down selection to **IT**.
7. Select **Operating Systems > Windows > Windows 8**. Open **'Windows: Should I upgrade to Windows 8.x?'**
8. Give the article **5 stars**, and answer **Helpful? Yes**.
9. Navigate to **Knowledge > Homepage**.
10. Notice "Windows: Should I upgrade to Windows 8.x?" and "How to configure VPN for Apple Devices" are now listed under "Most Useful."

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Search Knowledge as System Administrator

1. While still on the Knowledge Homepage, search for **windows**.
2. Notice multiple results are received, but at the top in gray-blue is “What is the Windows key?” the article identified as Featured Content for the keyword “windows.”
3. Notice you can continue to browse after searching.

   Your screen should look like the example.



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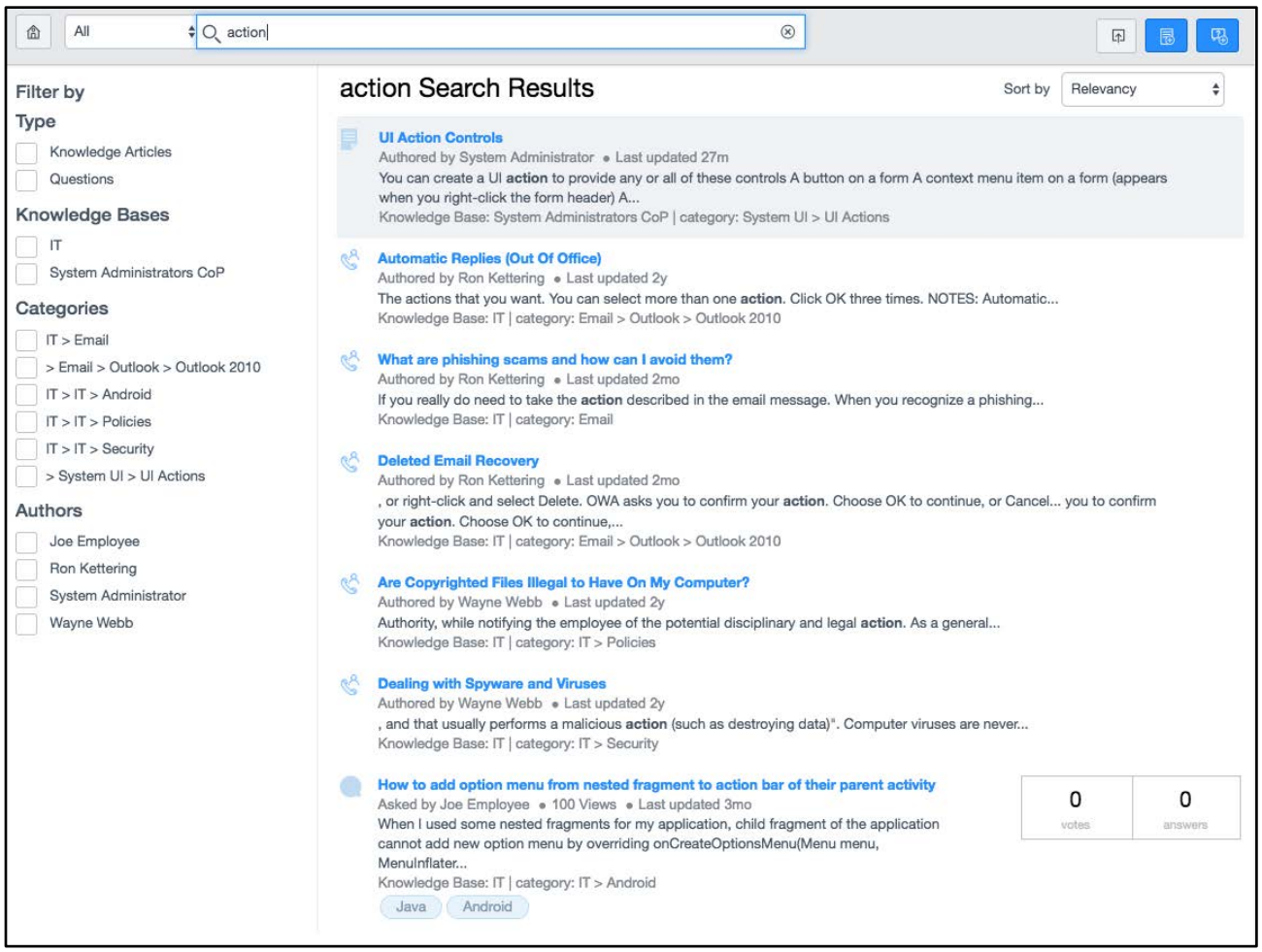
4. Return to the Knowledge Homepage, and search for **action**.

5. Notice multiple results are received, but at the top in gray-blue is “UI Action Controls,” the article we created and identified as Featured Content in the System Administrator CoP Knowledge Base for the homepage and the keyword “action.”

6. Notice you can continue to browse after searching.

Lab Success Verification

1. Your screen should look like the example.



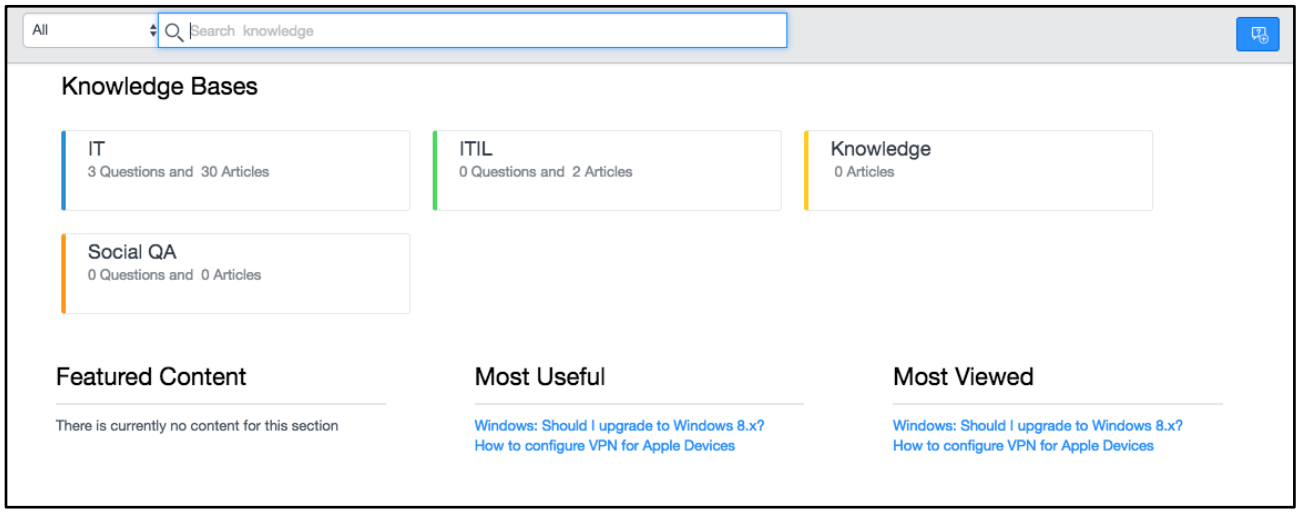
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Knowledge Homepage as User

1. Impersonate user **Aileen Mottern**.
2. Navigate to **Self-Service > Knowledge**.
3. Notice, since Aileen is not a Knowledge Base Manager or Owner, she can only see Knowledge Bases where visibility has not been limited based on User Criteria.

Lab Success Verification

1. Your screen should look like the example.



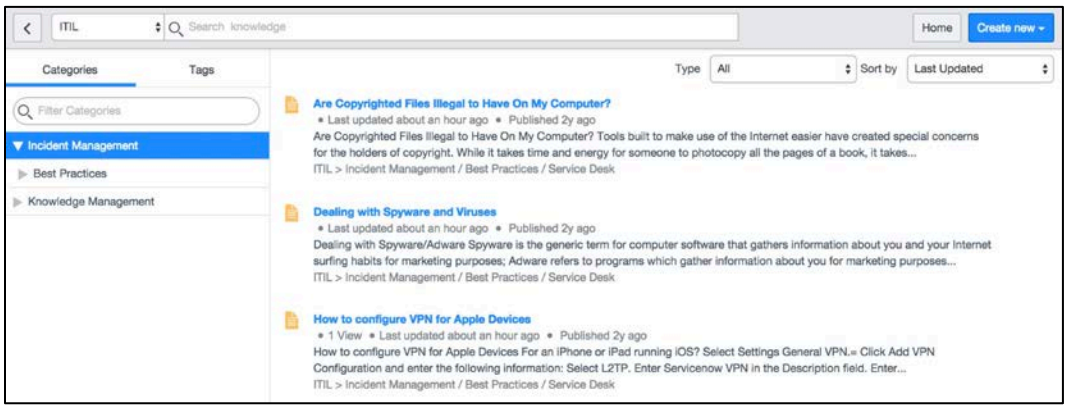
Knowledge Browsing as User

1. Open the **ITIL** Knowledge Base, and click **Incident Management**.
2. Notice the same articles are visible to Aileen as those visible to System Administrator.

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Lab Success Verification

1. Your screen should look like the example.



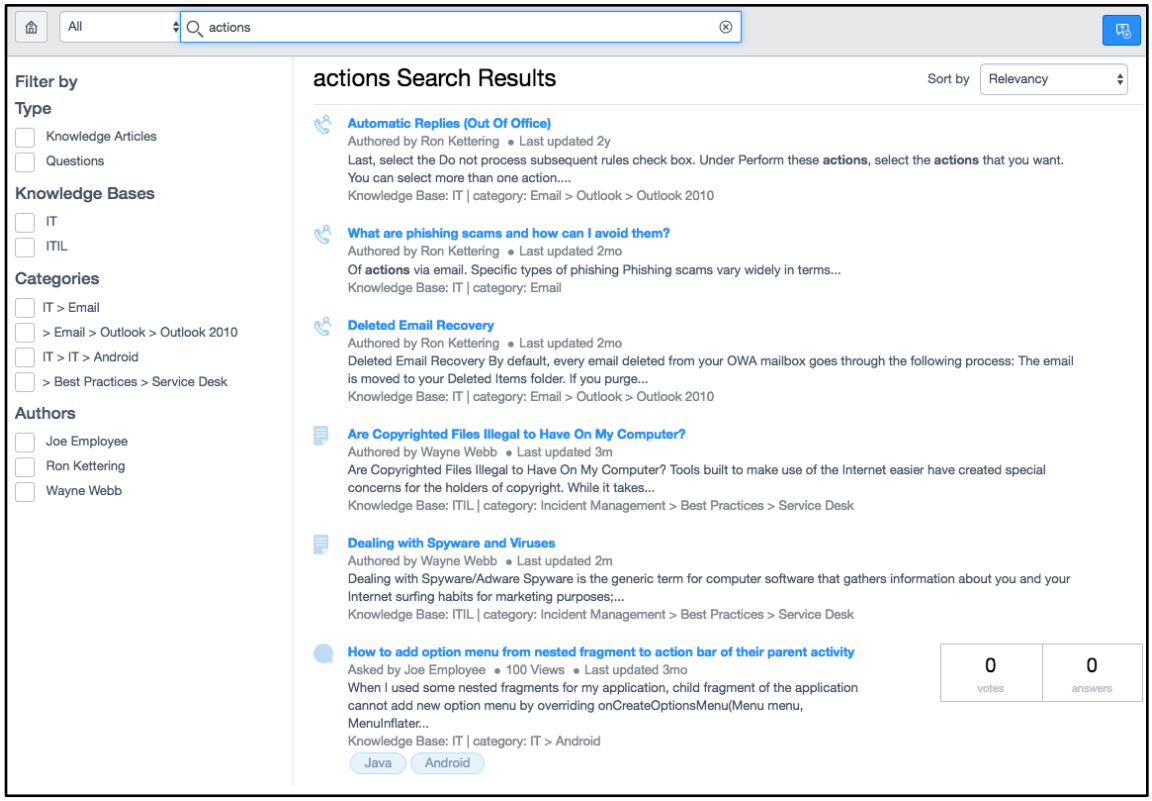
Search Knowledge as User

1. Return to the Knowledge Homepage, search for **windows**.
2. Notice multiple results are received, but at the top in gray-blue is the “What is the Windows key?” the article we identified as Featured Content for the keyword “windows.”
3. Notice you can continue to browse after searching for a phrase.
4. Return to the Knowledge Homepage, and search for **action**.
5. Notice multiple results are received, but “UI Action Controls,” the article we created and identified as Featured Content in the System Administrator CoP Knowledge Base for the homepage and the keyword “action” is not returned. This is because Aileen Mottern is not included in the user criteria associated with this content.

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Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 9.0 Enabling Social Q&A

This lab explains how to administer and use Social Q&A, which is organized by knowledge base, category, and tags.

- **Enable Social Q&A**—to enable Social Q&A for a knowledge base you manage
- **Disable Social Q&A**—to disable Social Q&A for a knowledge base you manage
- **Verify where Social Q&A is Enabled**—to ensure only the appropriate knowledge bases have Social Q&A enabled
- **Social Q&A Access Controls**—to determine which users have access to use Social Q&A within a specific knowledge base

Enable Social Q&A

1. Ensure you are logged in as yourself (System Administrator).
2. Navigate to **Knowledge > Knowledge Bases**.
3. Select **ITIL**.
4. Ensure the **Enable social questions and answers** check box is **checked**. This check box only appears if the Social Q&A plugin has been enabled.

Disable Social Q&A

1. Navigate to **Knowledge > Knowledge Bases**.
2. Select **System Administrators CoP**.
3. Deselect the **Enable social questions and answers** check box.
4. Click **Update**.

Verify Where Social Q&A is Enabled

1. Navigate to **Knowledge > Homepage**.
2. Click the second blue **Post a Question** UI Action.

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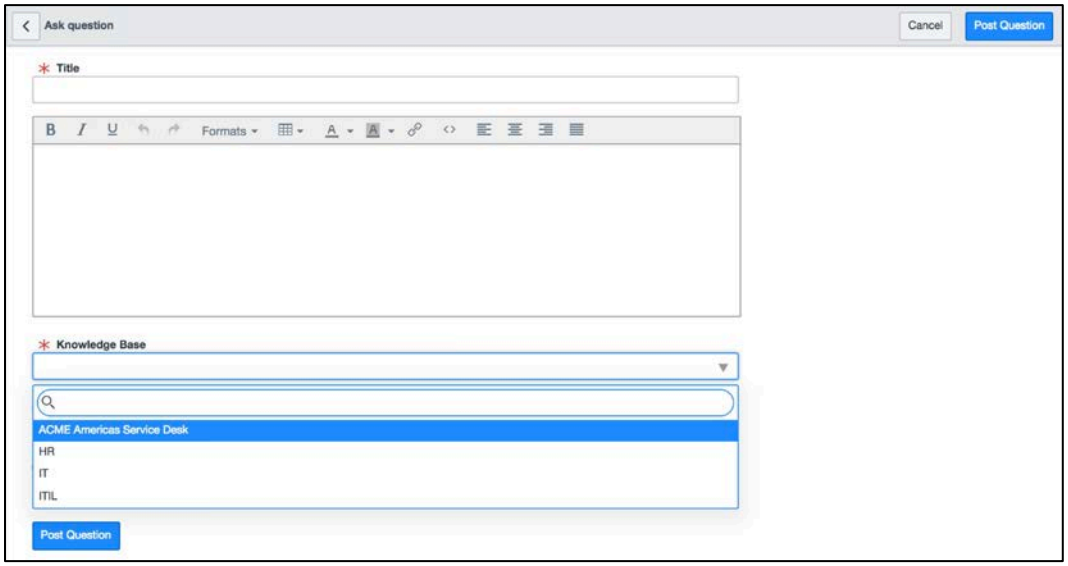
3. Notice both **Article** and **Question** are available actions. This is because the Social Q&A plug in is active. Select **Question**.

4. On the **Ask a Question** form, open the **Knowledge Base** drop-down list.

5. Notice all the Knowledge Bases are available except **System Administrators CoP**.

Lab Success Verification

1. Your screen should look like the example.



Social Q&A Access Controls

1. Navigate to **Knowledge > Knowledge Bases**.

2. Select **ITIL**.

3. Access the **Can Read** and **Can Contribute** related lists.

4. The previously identified user attributes for knowledge also apply to Social Q&A for the ITIL Knowledge Base.

5. Updating the **Can Read** or **Can Contribute** related lists for Social Q&A will also affect who can read, edit, or create content within the selected knowledge base.

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Lab Goal

Lab 10.0 Social Q&A Questions

This lab explains how to administer and use Social Q&A, which is organized by knowledge base, category, and tags.

- **Ask Questions**—to submit questions
- **Answer Questions**—to provide possible answers to questions that have been asked by other users
- **Comment on Questions and answers**—to provide feedback about specific questions and answers
- **Edit Comments and Answers**—to clarify previously submitted comments and answers
- **Edit Questions**—to clarify previously submitted questions
- **Vote on Questions and Answers**—to like or dislike questions and answers
- **Subscribe to a Question**—to receive updates as more information is available for specific questions
- **Delete a Question**—to remove questions completely
- **Share a Question**—to capture the URL for the specific question to allow additional users to find it quickly

Ask Questions

1. Navigate to **Self-Service > Knowledge**.
2. Click **Create New**.
3. Click **Question**.
4. On the **Ask a Question** form, enter the following:

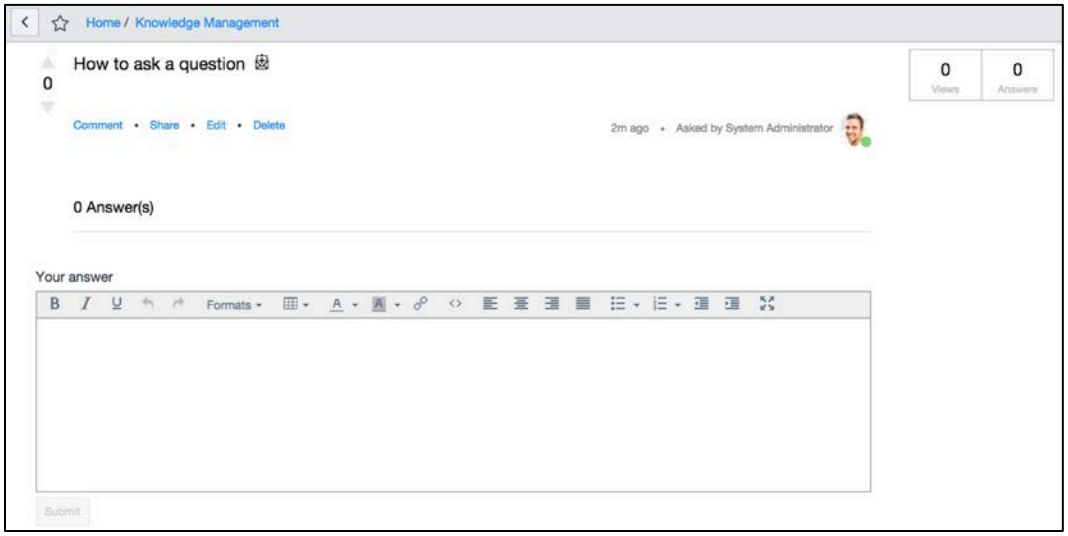
   Title: **How to ask a question**
   Knowledge Base: **ITIL**
   Category**: Knowledge Management**

5. **Click Post Question**.

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Lab Success Verification

1. Your screen should look like the example.



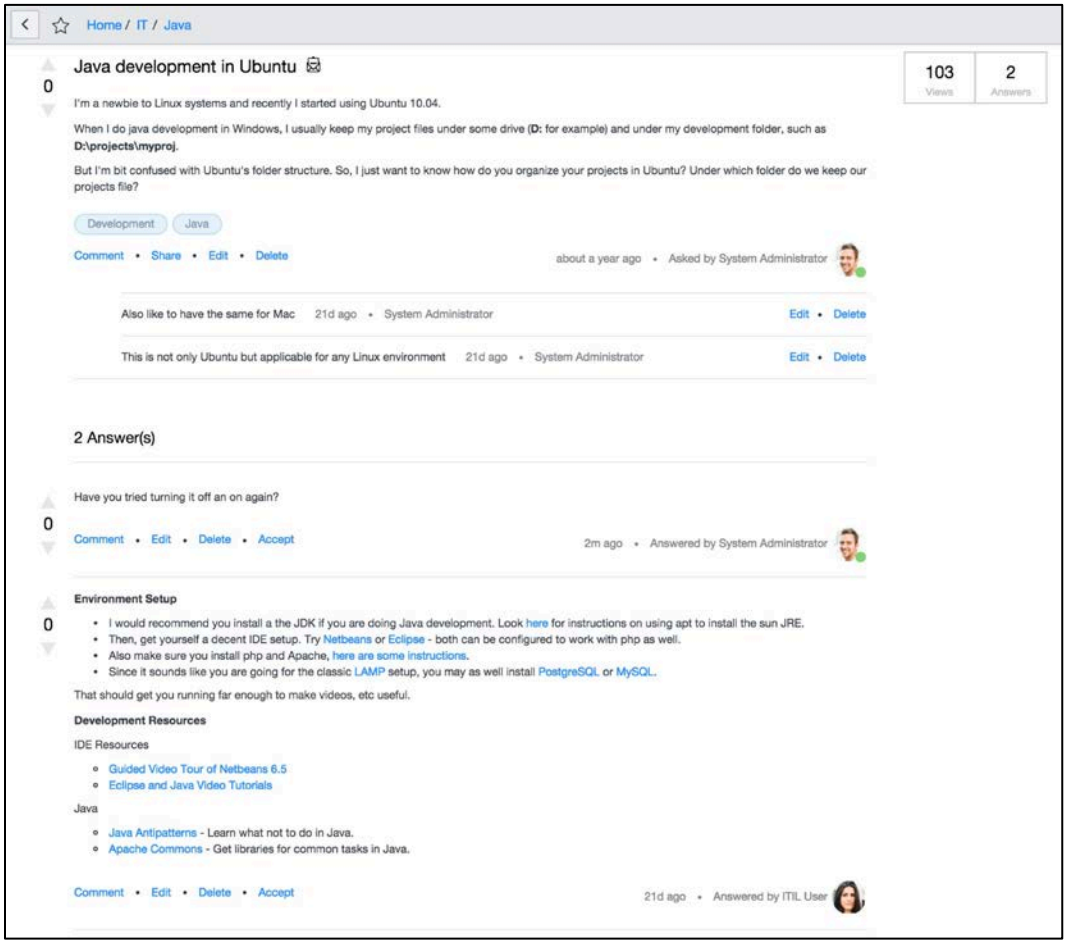
Answer Questions

1. Navigate to **Self-Service > Knowledge**.
2. Search for **Java**.
3. Select **Java development in Ubuntu**.
4. Type the following in the **Your Answer** field: **Have you tried turning it off and on again?**
5. Click **Submit**.

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Lab Success Verification

1. Your screen should look like the example.



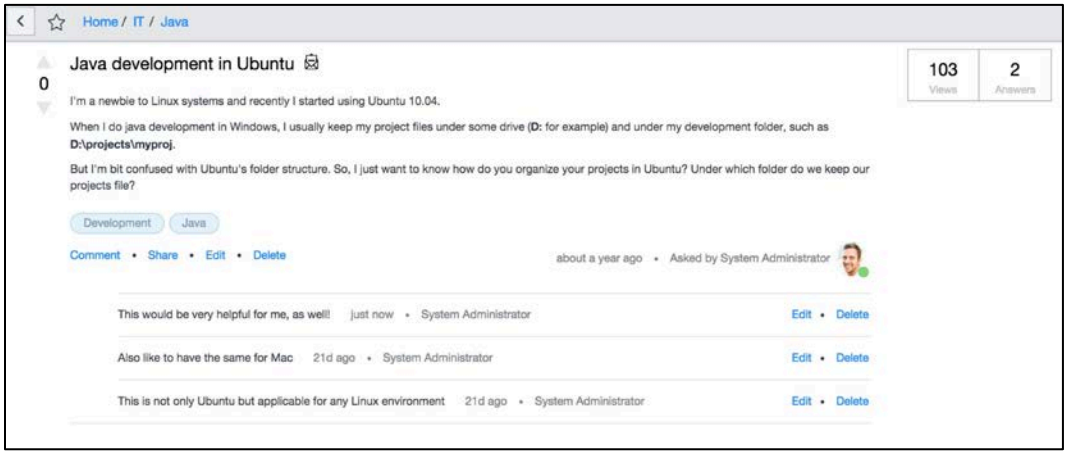
Comment on Questions or Answers

1. While still on **Java development in Ubuntu**, click the **Comment** link directly under the **Tags**.
2. Enter the following comment text: **This would be very helpful for me, as well!**
3. Remember Comments have a maximum length of 140 characters!
4. Click **Post comment** or press **Enter**.

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Lab Success Verification

1. Your screen should look like the example.



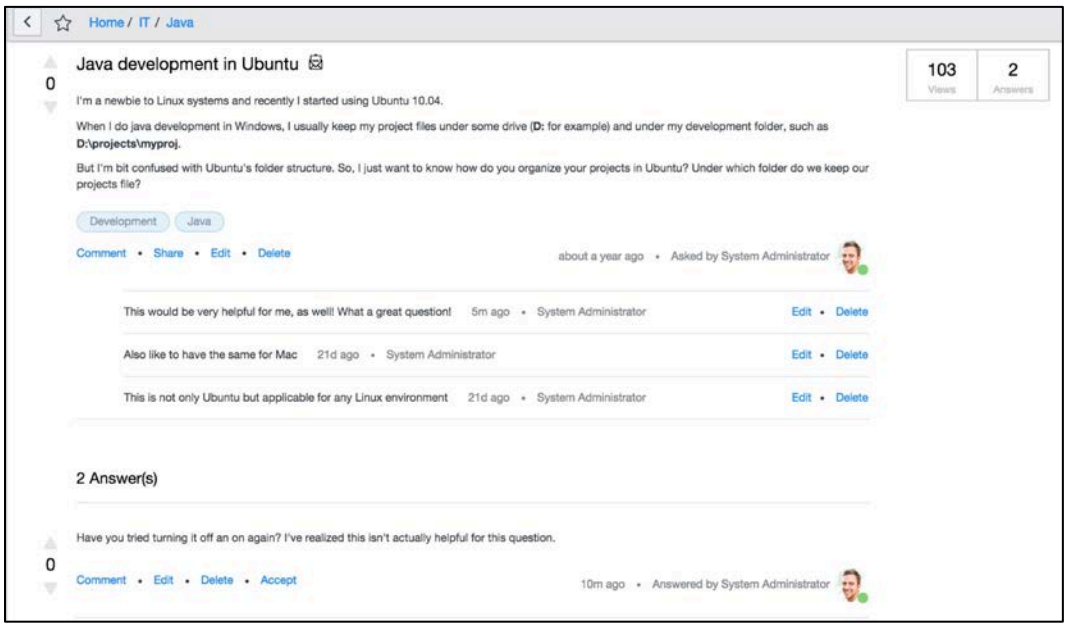
Edit Comments and Answers

1. Within the same question, click **Edit** next to the Comment you posted.
2. Add the following text: **What a great question!**
3. Click **Update**.
4. Within the same question, click **Edit** next to the Answer you posted.
5. Add the following text: **I've realized this isn't actually helpful for this question.**
6. Click **Update**.

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Lab Success Verification

1. Your screen should look like the example.



Edit Questions

1. Navigate to **Self-Service > Knowledge**.
2. Search for **question**.
3. Select **How to ask a question**.
4. Click **Edit** under the question.
5. Click inside the WYSIWYG editor and add the following text: **I specifically mean questions within the Social Q&A platform. I'm not sure how to ask questions of users who have access to this knowledge base.**
6. Click **Advanced** next to **Update**.
7. Change the Category to **Knowledge Management/ Best Practices**.
8. Click **Update**.

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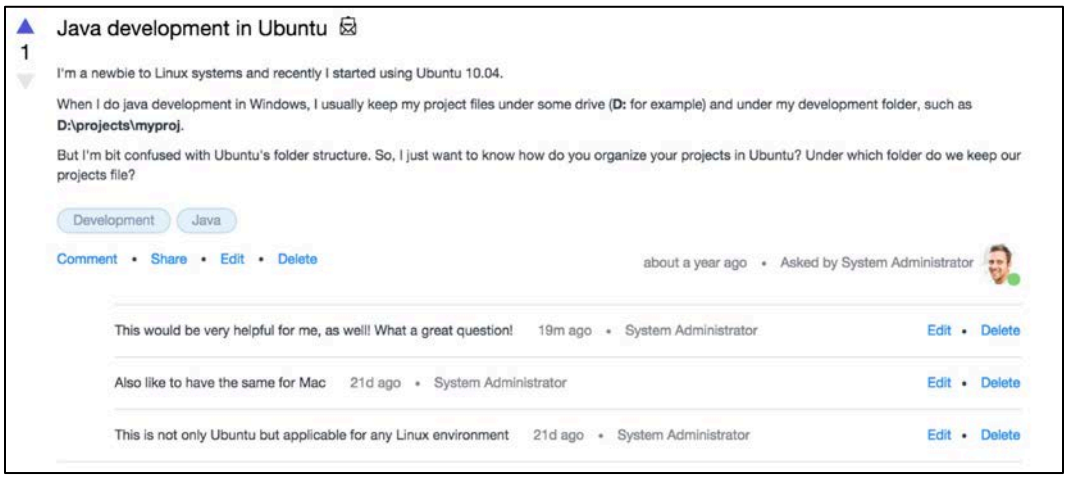
Lab Success Verification

1. Your screen should look like the example.



Vote on Questions and Answers

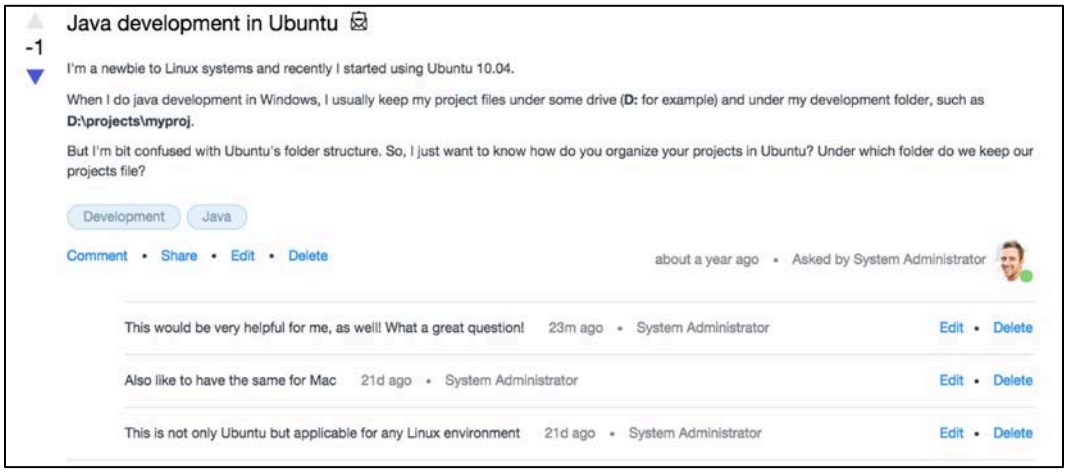
1. Navigate to **Self-Service > Knowledge**.
2. Search for **Java**.
3. Select **Java development in Ubuntu**.
4. Click the **Up Arrow** next to the question to upvote.
5. Your screen should look like the example.



6. Try to click the **Up Arrow** again. Notice you cannot, but you can still click the **Down Arrow.** Clicking the **Down Arrow** nullifies the previous vote.
7. Click the **Down Arrow** again.

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8. Your screen should look like the example.



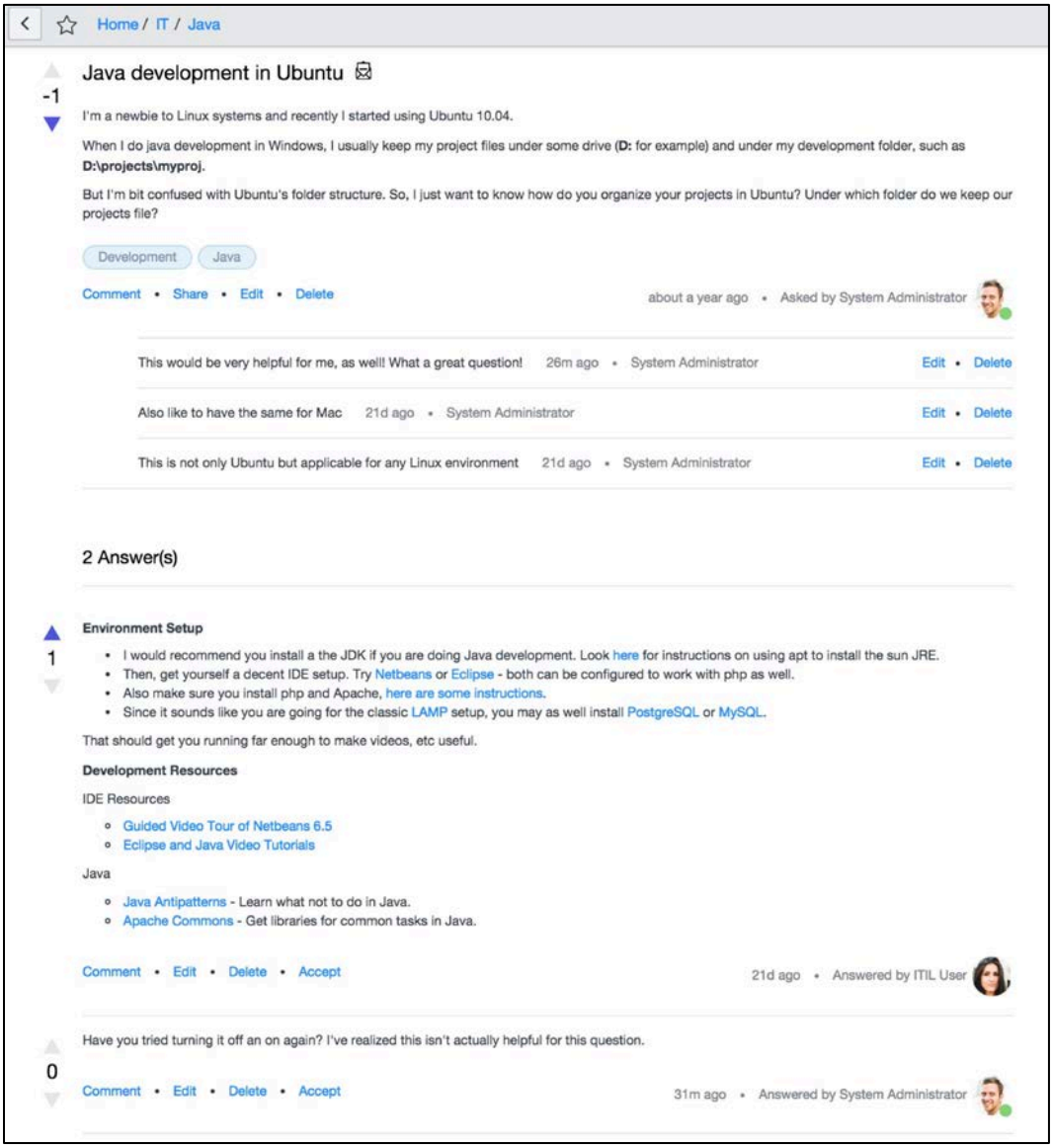
9. On the same question, upvote the Answer from ITIL User.

10. Notice the Answer from ITIL User is now at the top of the list.

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Lab Success Verification

1. Your screen should look like the example.



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Subscribe to a Question

1. While on the same question, click the **Subscribe** icon. 
2. To stop receiving notifications, click the **Unsubscribe** icon. 

Delete a Question

1. Navigate to **Self-Service > Knowledge**.
2. Search for **question**.
3. Click the **Delete** link.
4. Click the **Delete** UI Action on the pop-up window.
5. Notice you return to the previous search. The question should no longer be available in the search results.

Share a Question

1. Navigate to **Self-Service > Knowledge**.
2. Search for **Java**.
3. Select **Java development in Ubuntu**.
4. Click the **Share** link.
5. If a dialog box opens, type **CTRL + C** to copy the link.
6. Use this link to distribute the question.

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Lab Goal

Lab 11.0
Social Q&A Tags

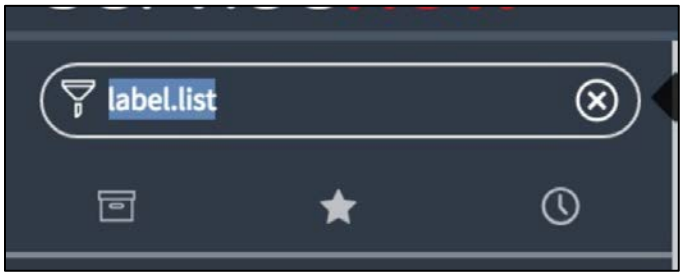
(Extra Credit)

This lab explains how to administer and use Social Q&A, which is organized by knowledge base, category, and tags.

- **Create Social Q&A Tags**—to create additional keywords that can be used to ensure easier discoverability of content
- **Apply Social Q&A Tags**—to apply the keywords to ensure easier discoverability of content

Create Social Q&A Tags

1. In the left navigation search box, type **label.list**.



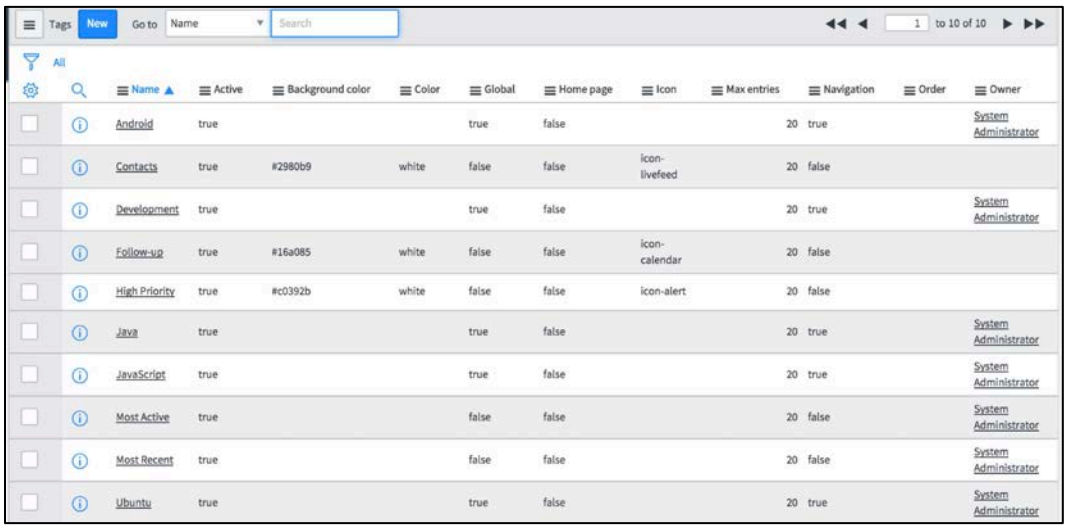
2. Click **Enter**.
3. This is the list of **Tags** available for use in Social Q&A and across the instance.
4. Click **New**.
5. On the **Tag Form**, populate the following:

   Name: **Ubuntu**
   Viewable by: **Everyone**

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Lab Success Verification

1. Your screen should look like the example.



Name	Active	Background color	Color	Global	Home page	Icon	Max entries	Navigation	Order	Owner
Android	true			true	false		20	true		System Administrator
Contacts	true	#2980b9	white	false	false	icon-livefeed	20	false		
Development	true			true	false		20	true		System Administrator
Follow-up	true	#16a085	white	false	false	icon-calendar	20	false		
High Priority	true	#c0392b	white	false	false	icon-alert	20	false		
Java	true			true	false		20	true		System Administrator
JavaScript	true			true	false		20	true		System Administrator
Most Active	true			false	false		20	false		System Administrator
Most Recent	true			false	false		20	false		System Administrator
Ubuntu	true			true	false		20	true		System Administrator

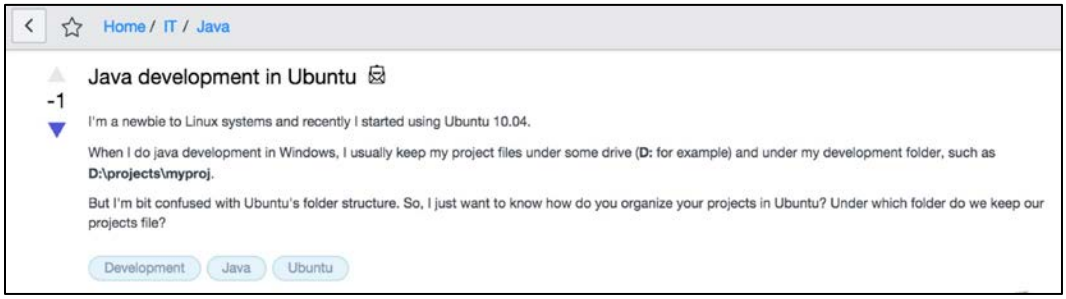
Apply Social Q&A Tags

1. Navigate to **Self-Service > Knowledge**.
2. Search for **Java**.
3. Select **Java development in Ubuntu**.
4. Click the **Edit** link.
5. Click the **Advanced** link.
6. In the **Tags** field, type **Ubuntu**.
7. Click **Enter**.
8. Notice the **Ubuntu** tag is added to the question.
9. Click **Update**.

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Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 12.0
Search

(Extra Credit)

This lab explains how to administer and use Social Q&A, which is organized by knowledge base, category, and tags.

- **Create Meta**—to provide keywords to ensure content is discoverable by Zing Text Search
- **Adjust ts_weight**—to make specific fields more valuable to Zing Text Search

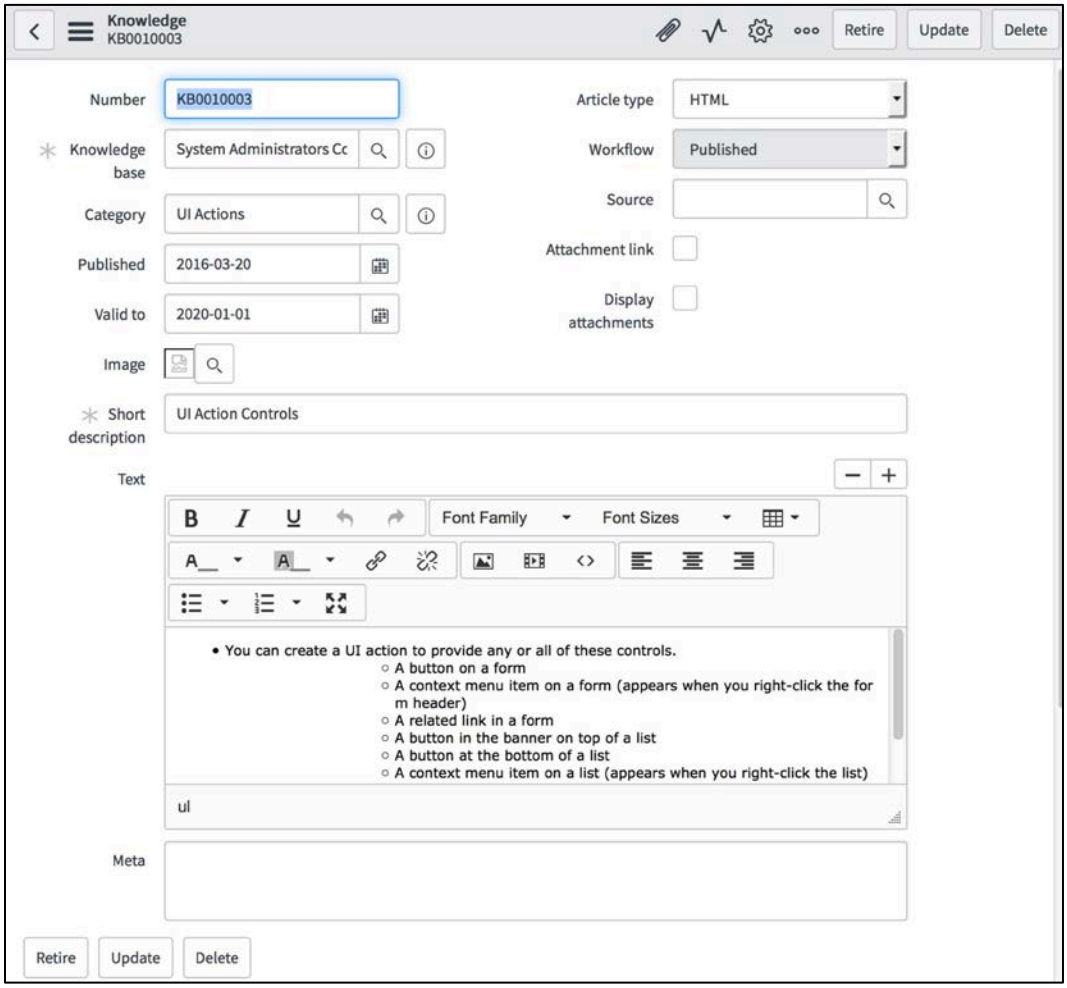
Add Meta to the Knowledge Form

1. Navigate to **Self-Service > Knowledge**.
2. Click **System Administrators CoP**.
3. Open **UI Action Controls**.
4. Click the **Edit** UI Action.
5. Notice the **Meta** field is not available.
6. Right-click in the header bar.
7. Select **Configure** > **Form Layout**.
8. Select **Meta** from the **Available** (left) side, and move it to the **Selected** (right) side.
9. Click **Save**.

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Lab Success Verification

Your screen should look like the example.



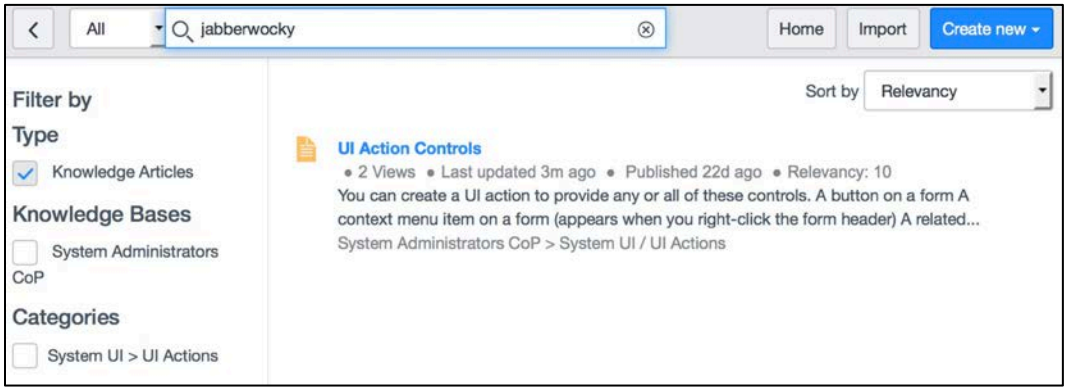
Populate Meta

1. In the Meta field, add the following: **jabberwocky**
2. Right-click in the header, and click **Save**.
3. Navigate to **Self-Service > Knowledge**.
4. Search for **jabberwocky**.

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Lab Success Verification

Your screen should look like the example.



Manipulate Meta

1. Notice the Relevancy indicator is: **10**.
2. Open the **UI Action Controls** article.
3. Click **Edit**.
4. In the Meta field, add the following: **jabberwocky, jabberwocky, jabberwocky**
5. Right-click in the header, and click **Save**.
6. Navigate to **Self-Service > Knowledge**.
7. Search for **jabberwocky**.
8. Notice the Relevancy indicator is: **30**.

Manipulate Text Search Weights

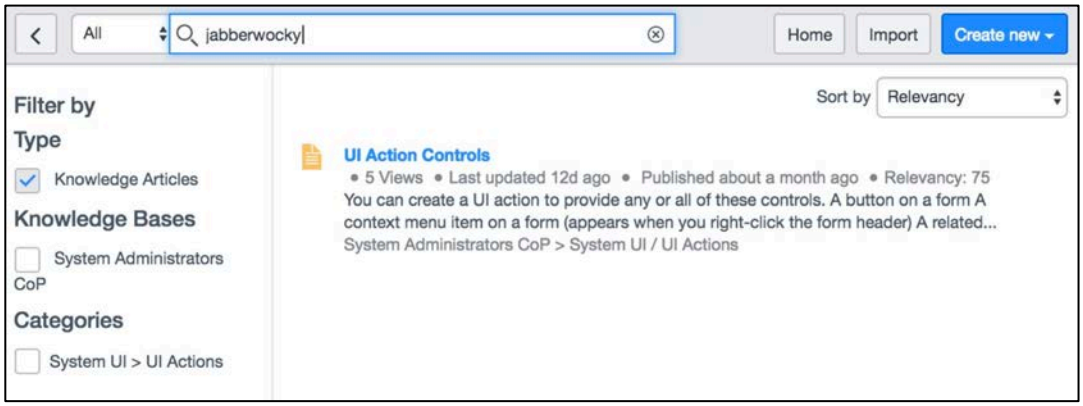
1. Navigate to **System Definition** > **Dictionary**.
2. Add the **Attributes** field to the table by clicking the cog.
3. Filter for **Table IS kb_knowledge** AND **Column name IS meta**.
4. Open the form.
5. Open the **Attributes** Related List at the bottom of the form.

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6. Notice the first Attribute is **Text Search Weight = 10**.
7. Double-click in the Value field, and change the Text Search Weight to **25**.
8. Navigate to **Self-Service > Knowledge**.
9. Search for **jabberwocky**.
10. Notice the Relevancy indicator is: **75**. (Re-indexing of the knowledge table may take a few minutes, so it may be a moment before the Relevancy indicator is updated.)

Lab Success Verification

1. Your screen should look like the example.



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