knowledge17

http://clabs.link/lab132015

WORK at LIGHTSPEED

Drive Service Efficiency With Knowledge

Semhar Yemaneab
Sr. Solution Consultant
ServiceNow

Paul McConnon
Director, Solution Consulting Architect
ServiceNow

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servicenow

Agenda

Introducing Knowledge v3

Menus, Modules, and Properties

User Criteria

Knowledge Bases

Category Structure

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Agenda

Content Migration

Creating, Featuring, and Viewing Content

Enabling and Using Social Q&A

Improving Search Effectiveness

Jakarta Roadmap

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Speaker Introduction



Name: Semhar Yemaneab

Title: Sr. Solution Consultant, CSM

Function: Sales

Company: ServiceNow

Experience: 4.5 years with ServiceNow, 8.5 years experience on working on ServiceNow. Former ServiceNow admin for a Healthcare system in Minneapolis.

Expertise: CSM**,** ITIL and Enterprise Service Management

Achievements: Assisted customers with resolving business issues with ServiceNow solutions.

Current Projects: Building vertical specific solution sets for CSM.

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Speaker Introduction



Name: Paul McConnon

Title: Director, Solution Consulting, Customer Service Management

Function: Sales

Company: ServiceNow

Experience: 6 months at ServiceNow, 6+ years in Enterprise Software, 12+ years in Customer Service Operations

Expertise: Customer Service, Contact Center Operations, Knowledge Centered Support

Achievements: Helping our customers deliver a more effortless, connected and proactive experience for their customers

Current Projects: Building a team of top Customer Service experts at ServiceNow

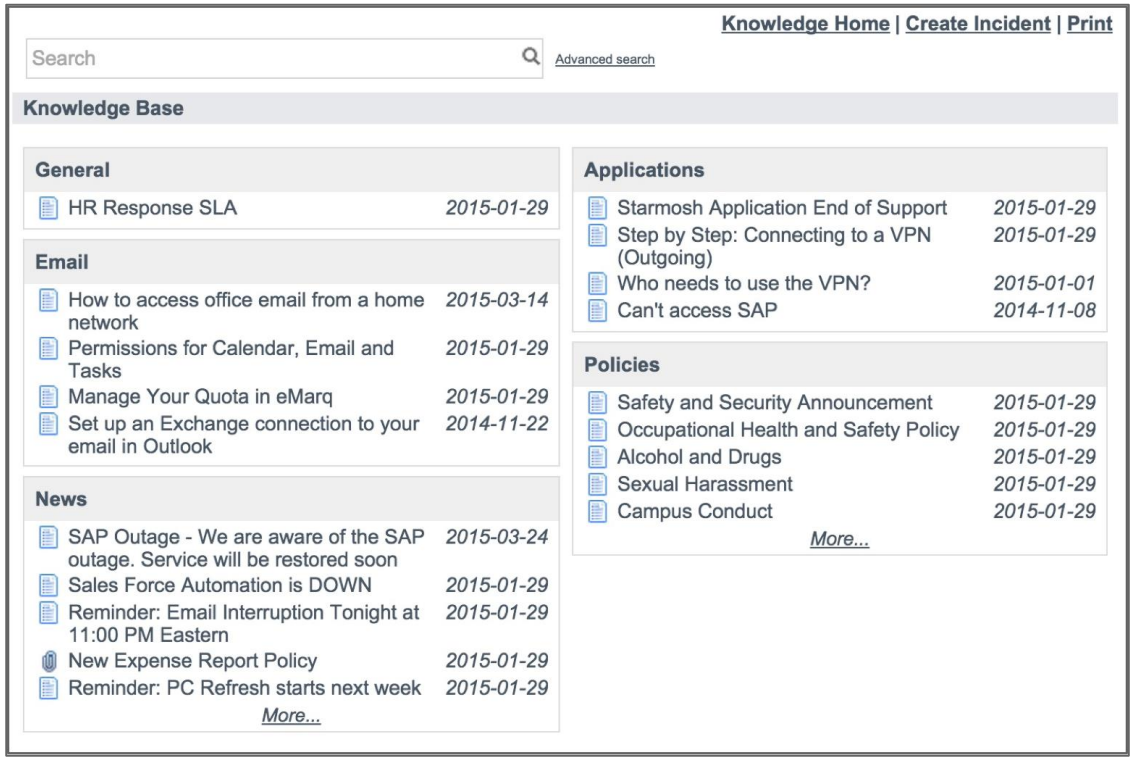
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Introducing Knowledge v3: Stepping into the NOW

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Knowledge v2 – Minimum Viable Product

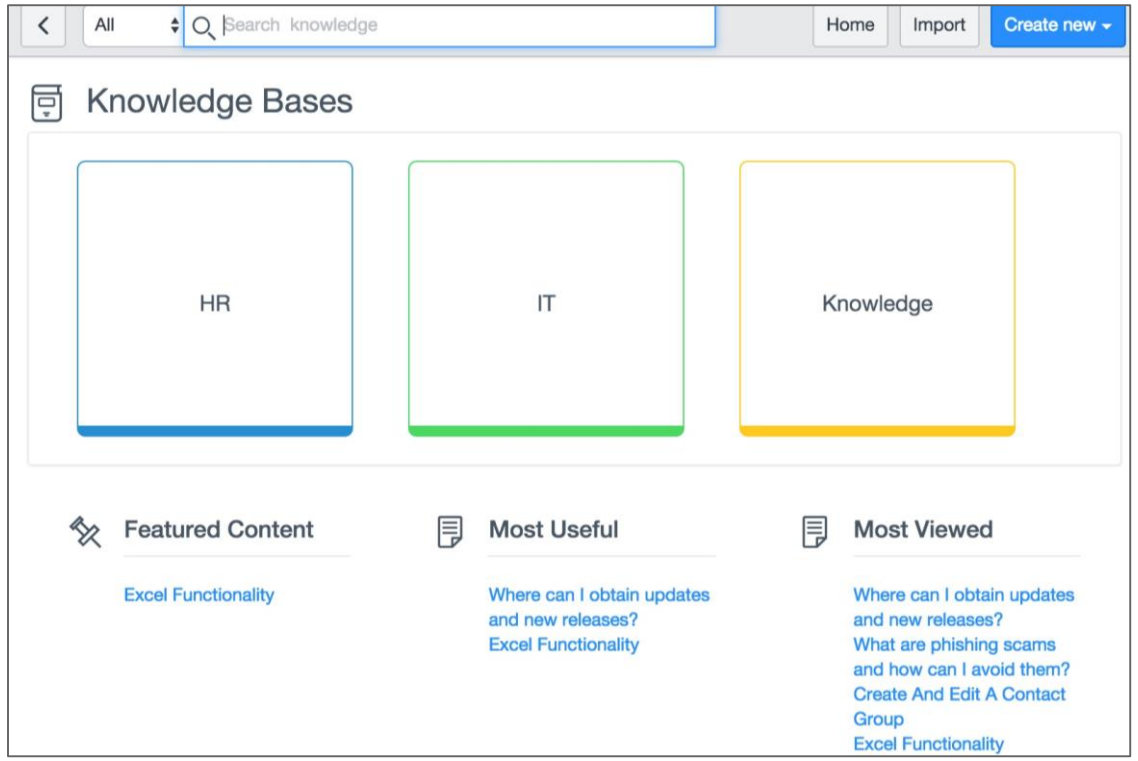
- One Knowledge Base
- Content Segmented in Topics and Categories
- Centralized Management
- Role-based Content Creation and Editing
- Utilitarian User Interface
- Universal User Experience



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Knowledge v3 – Most Valuable Product

- Multiple Knowledge Bases
- Content Segmented in Knowledge Bases with Categories and Infinite Subcategories
- Decentralized, Content-Specific Management
- User Attribute-based Content Creation and Editing
- Updated User Interface
- Personalized User Experience



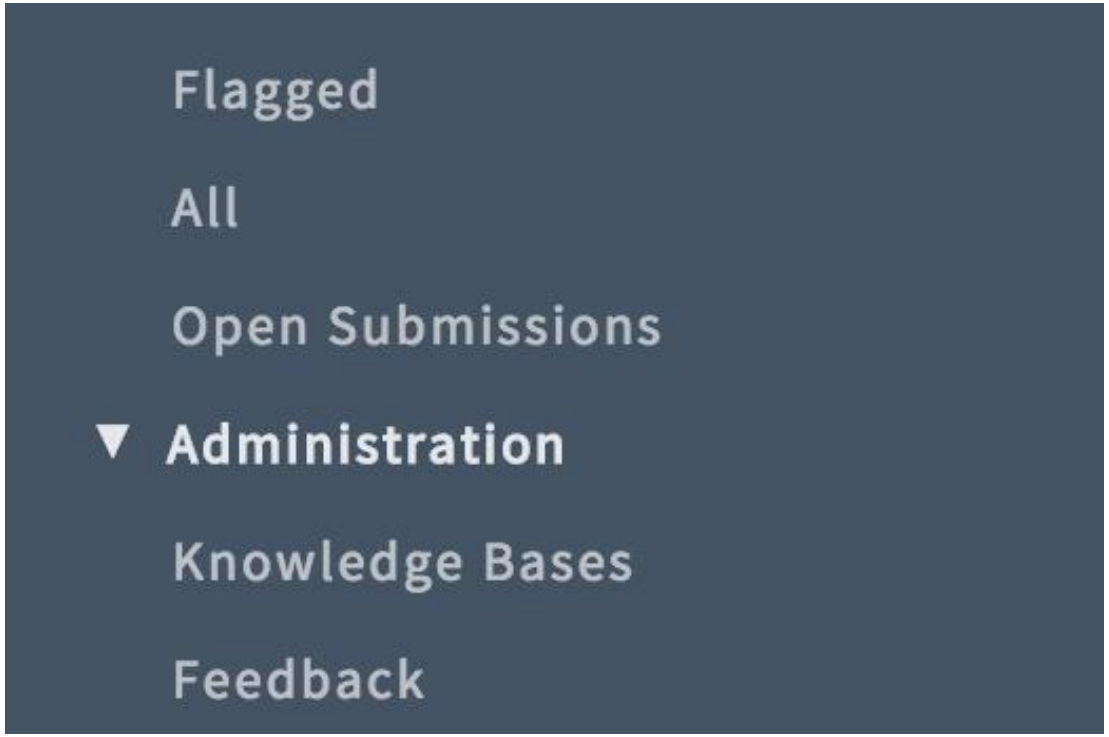
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Menus, Modules, and Properties: Navigating to Better Knowledge

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New Menu Items and Modules

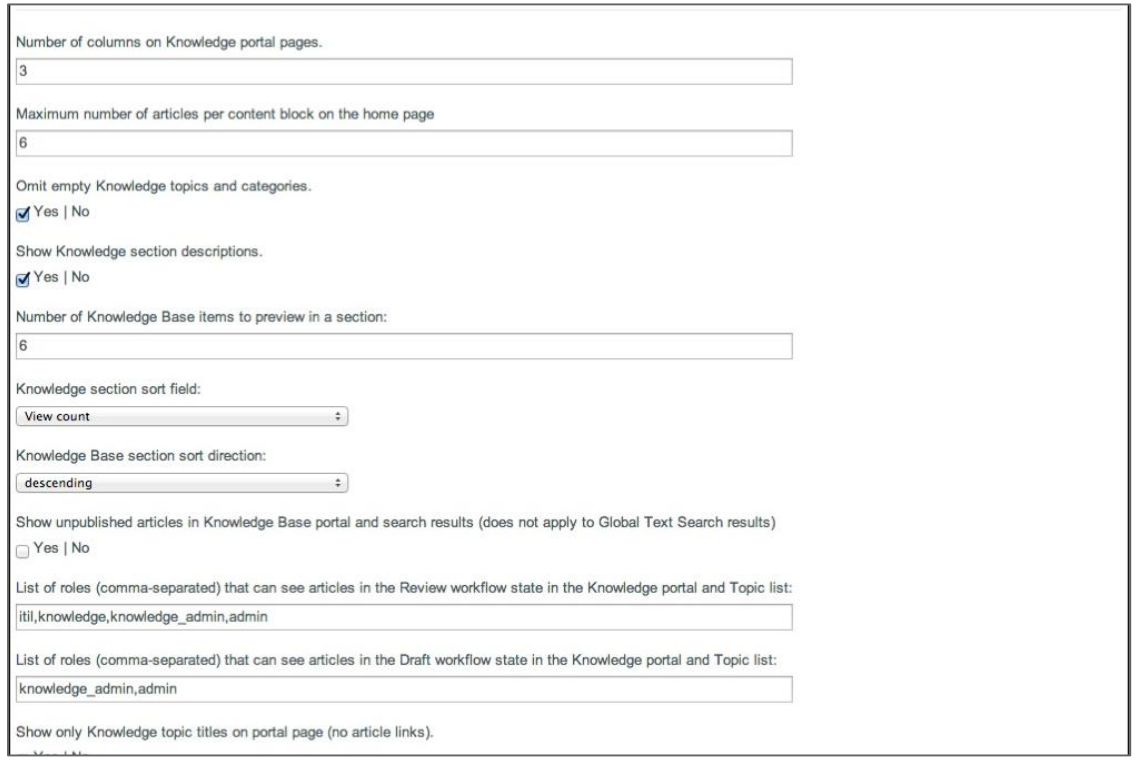
- Homepage
  - Opens Knowledge_Home_Launcher
    - This determines the appropriate home page for users based on their browser and credentials
- New Menu Header for My Knowledge
  - Knowledge Bases
    - Create and edit the highest level of content segmentation: Knowledge Base
- Administration
  - New Module for User Criteria
    - Create and edit attributes of users used to apply Can Read/ Can Contribute rights on Knowledge Bases



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Knowledge Portal Properties

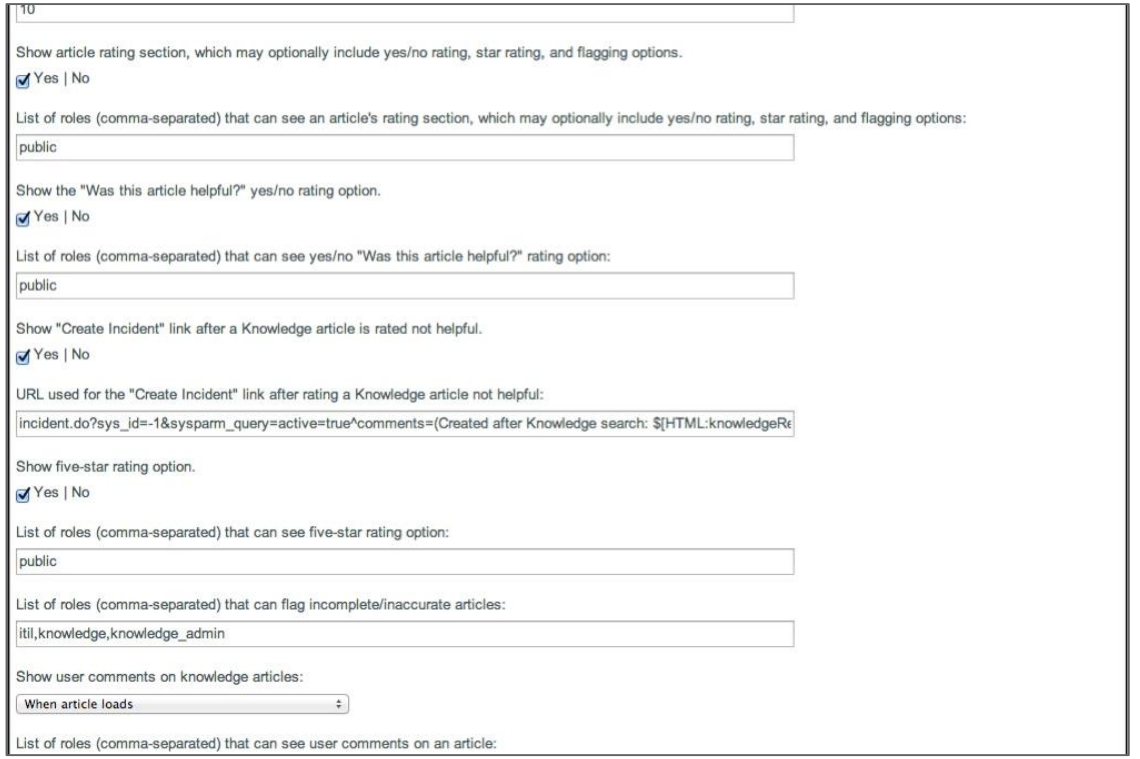
- Configure the following:
  - The way content appears to users:
    - Column limits
    - Articles per content block
    - Description visibility
  - Requirements for visibility of content in the Portal:
    - Unpublished content
    - Empty categories
  - Roles with additional privileges:
    - Review workflow state
    - Draft workflow state
  - Days used when calculating View Count



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Article View Properties

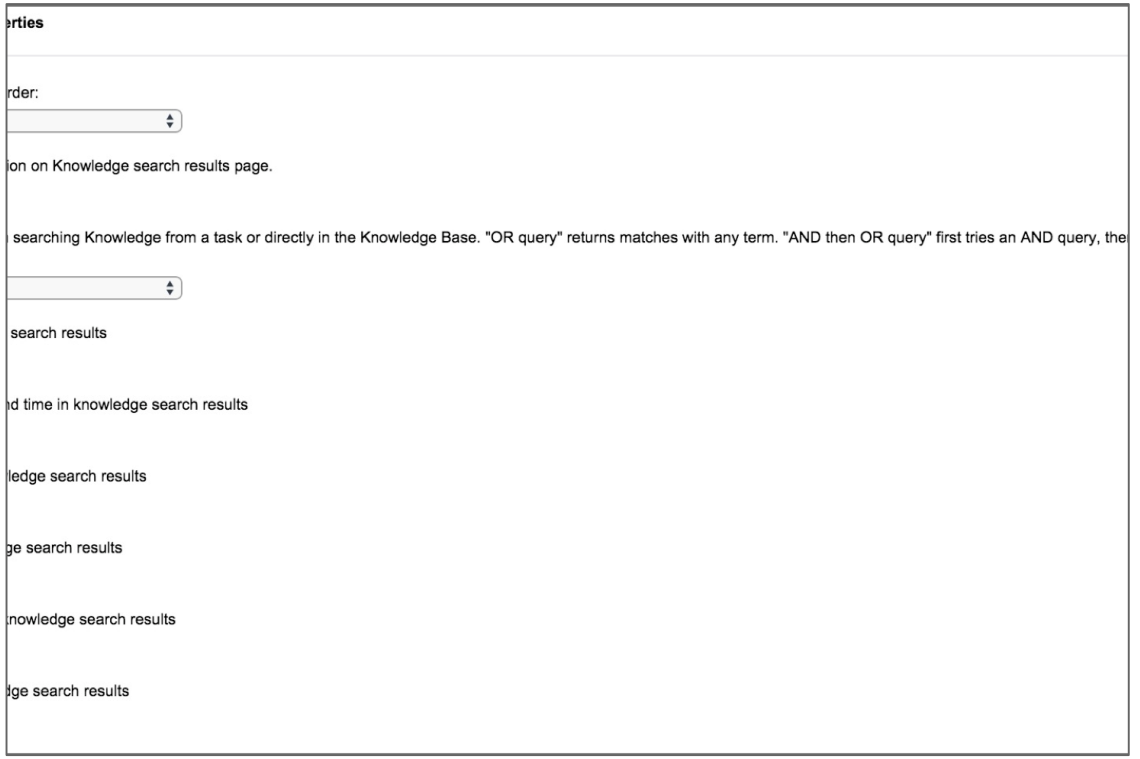
- Configure the following:
  - The way content appears to users:
    - Attached Tasks
    - Number of Attached Tasks
    - Create Incident Link
  - Requirements for visibility of content in the Article:
    - Article Ratings
    - “Was this article helpful” option
    - Flagging
    - User Comments
  - Use Live Feed for Commenting



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Knowledge Search Properties

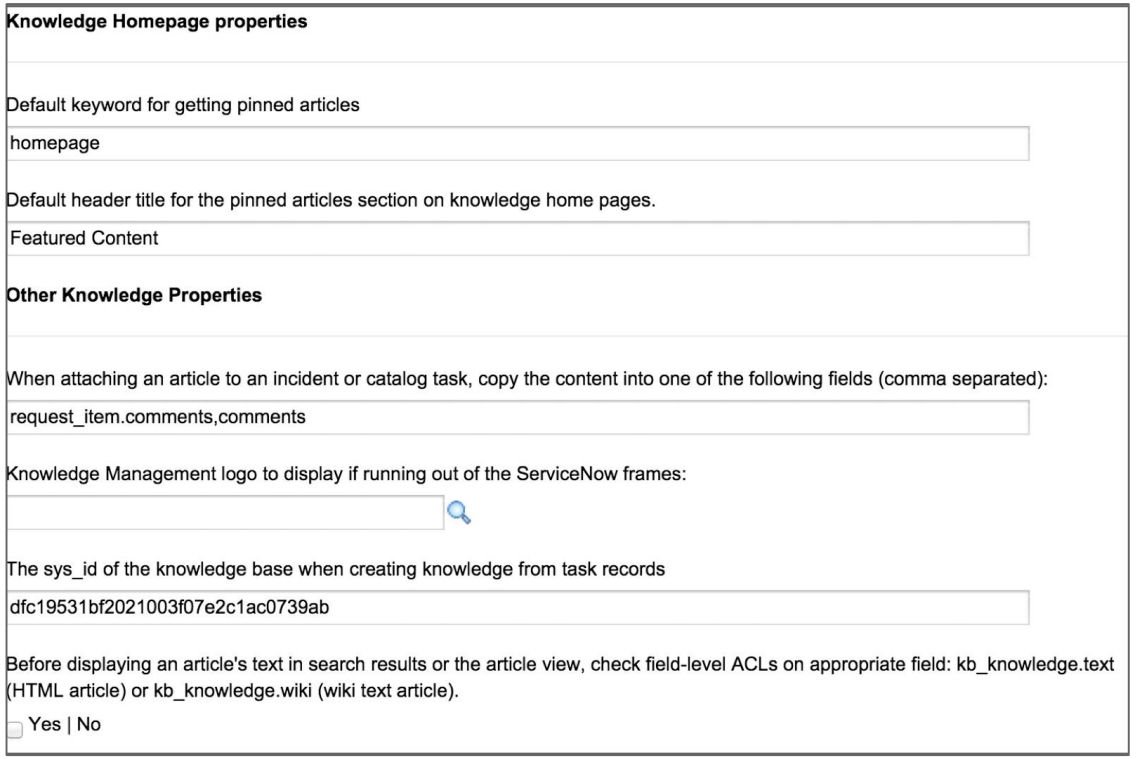
- Configure the following:
  - Results Order
  - Search Method
    - AND then OR
    - OR
  - Information shown in Search Results



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Knowledge Homepage and Other Knowledge Properties

- Configure the following:
  - Knowledge Homepage
    - Default Keyword for Pinned Articles
    - Pinned Article Header
  - Other Knowledge Properties
    - Field to copy content to when attaching an article
    - Knowledge Management Logo in frameless page
    - Check Field-level ACLs on kb_knowledge.text or kb_knowledge.wiki before displaying content in search results



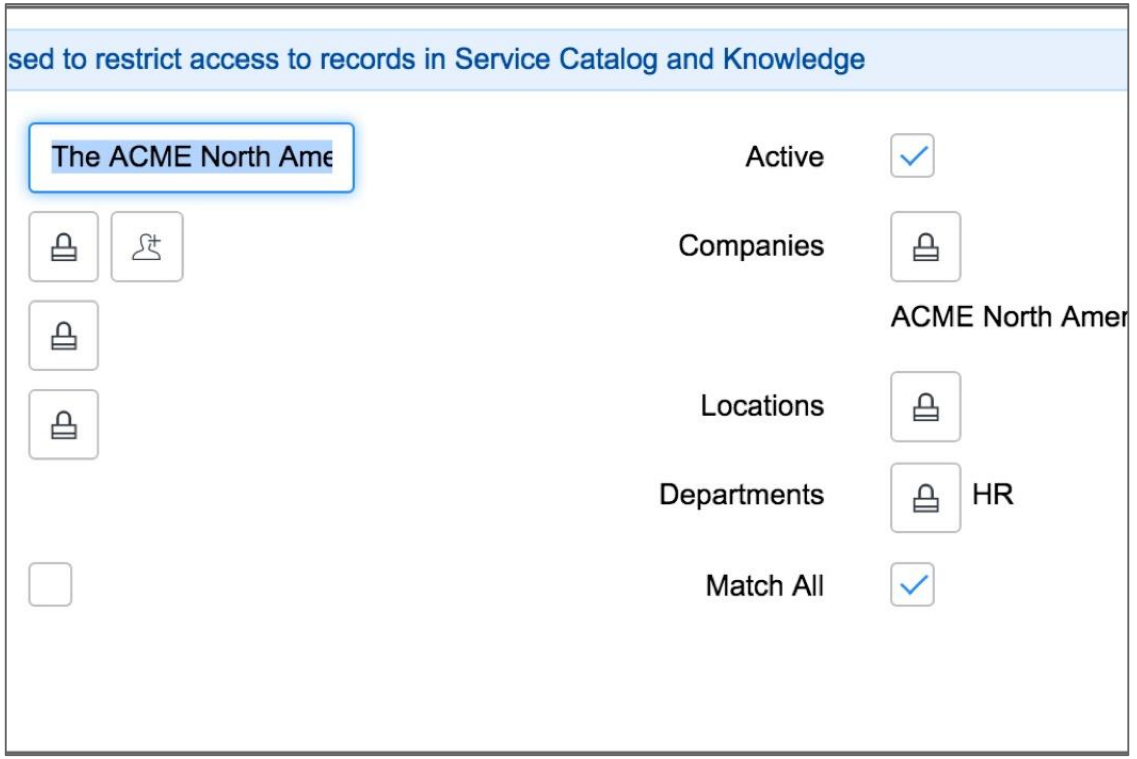
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User Criteria: Controlling Content Visibility

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Creating User Criteria

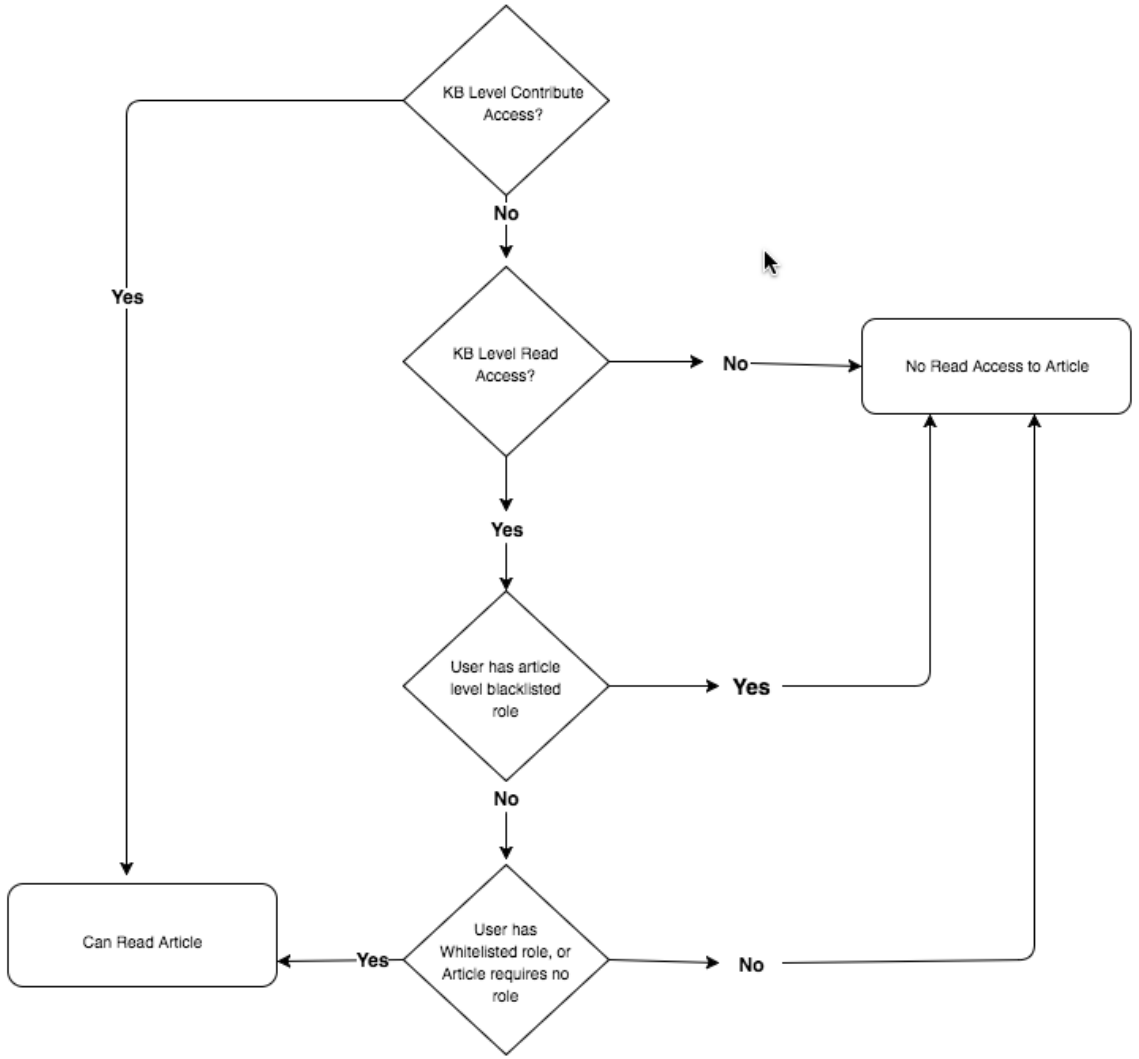
- Control access to content based on user attributes
  - Applicable to the Service Catalog and Knowledge Bases
- Match All
  - This checkbox verifies all conditions identified in the User Criteria are met when displaying content
- Reuse User Criteria
  - Create records to be shared across multiple items, categories, and content types
- Use common, meaningful naming conventions



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Creating User Criteria

- Support for article level access criteria



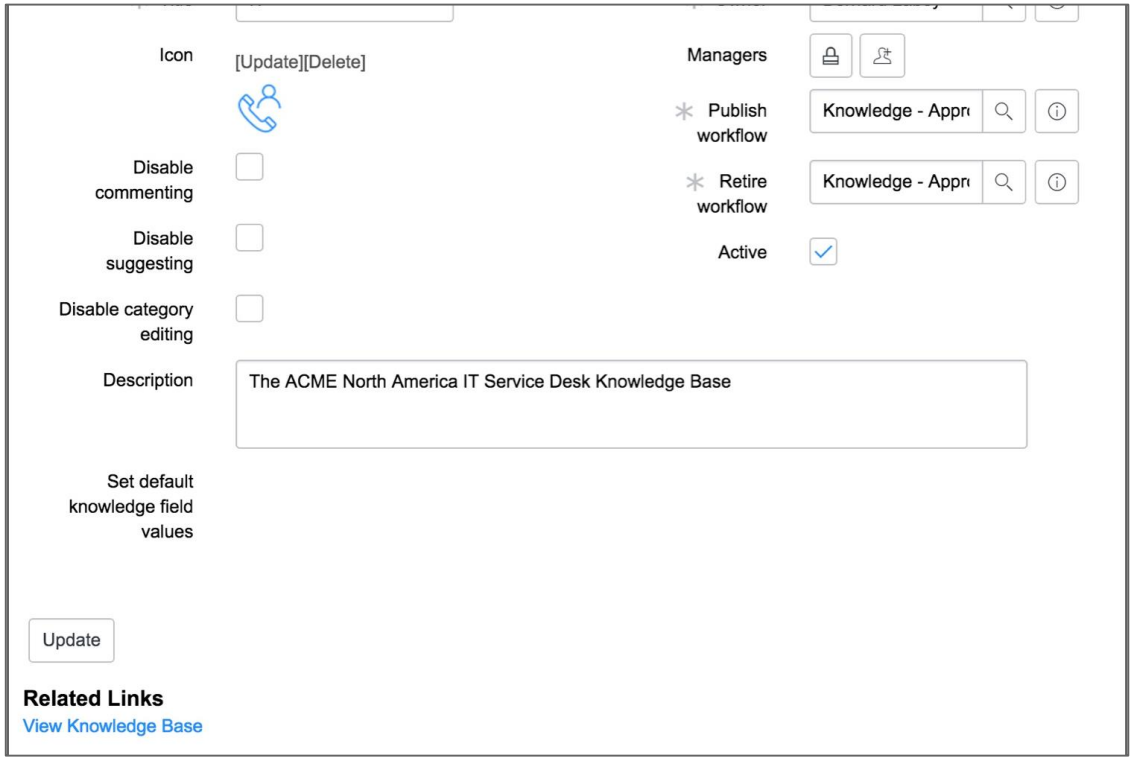
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Knowledge Bases:
Creating Valuable Segments of Content

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Creating Knowledge Bases

- Control Knowledge Base Attributes
- Identify the following:
  - Owners and managers
  - Publish and Retire
    - Identify separate graphical workflows for Publish and Retire on a per KB basis
- Enable or disable:
  - Commenting / Suggesting
  - Category editing
- Apply User Criteria for Can Read and Can Contribute
- Identify Featured Content
- Create Category Structure



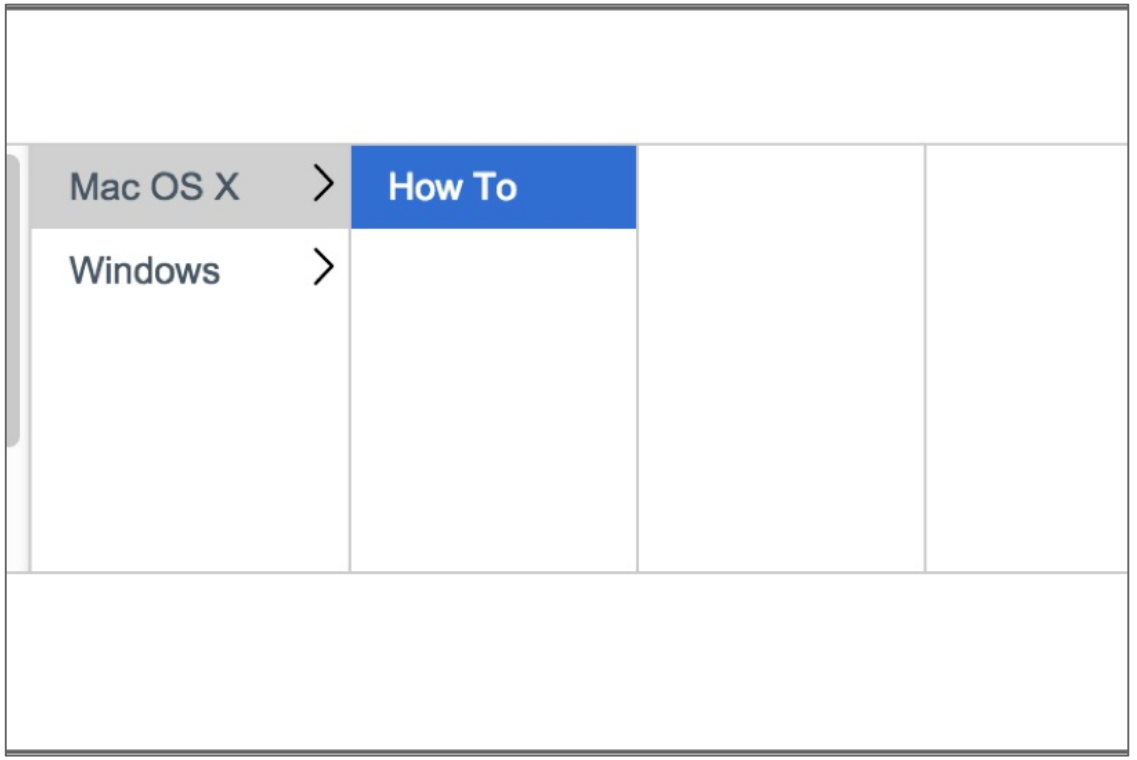
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Category Structure:
Building a Flexible (or Inflexible) Taxonomy

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Creating Category Structures

- Use the new Category Picker to create Category structures for each Knowledge Base
  - Each Knowledge Base requires its own Category structure
- Create Infinite Subcategory levels
- Only the final Category or Subcategory will display in the Category field of the Knowledge form



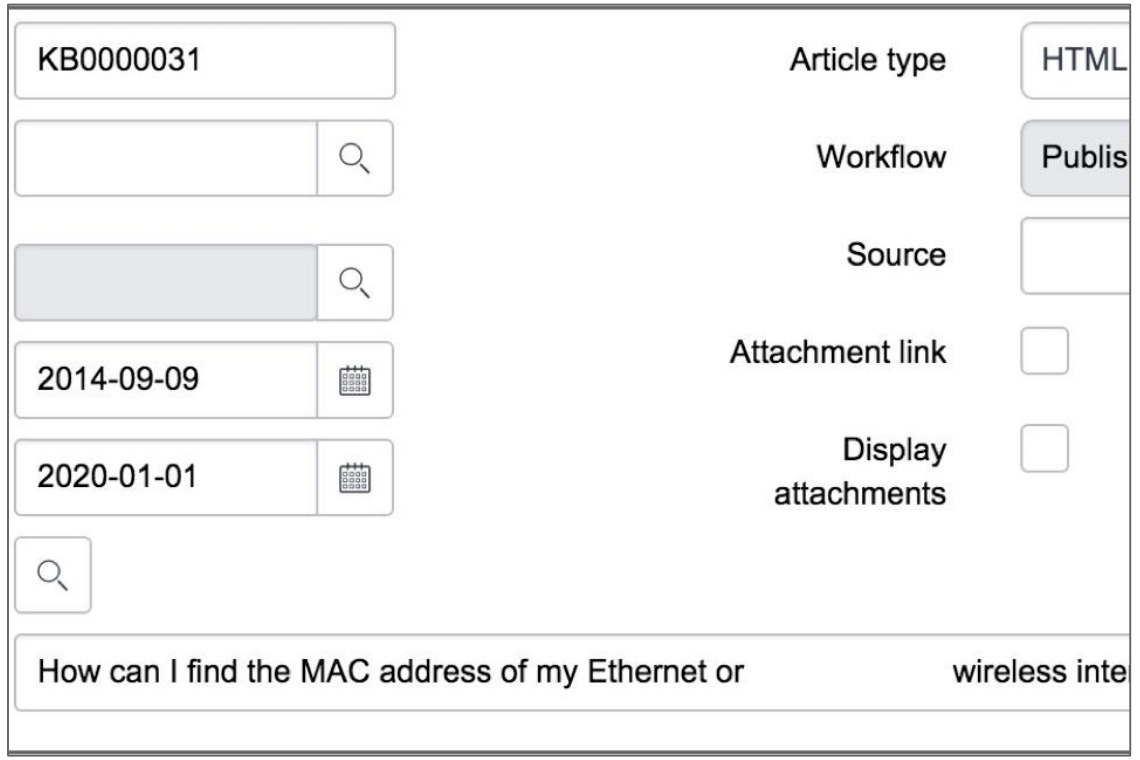
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Migrating Content:
Putting Content Where it Goes

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Migrating Content

- Knowledge Articles can be moved from one Knowledge Base to another in the following ways:
  - Manually, or one-by-one, by changing the Knowledge Base field on the form
    - This will be most effective once articles have previously been moved from v2 to v3 Knowledge Bases
  - Automatically through a mass update of kb_knowledge.list
    - This will be most effective for the initial, mass migration of content from the v2 Knowledge Base to new v3 Knowledge Bases
- Workflow states will be retained when articles are migrated



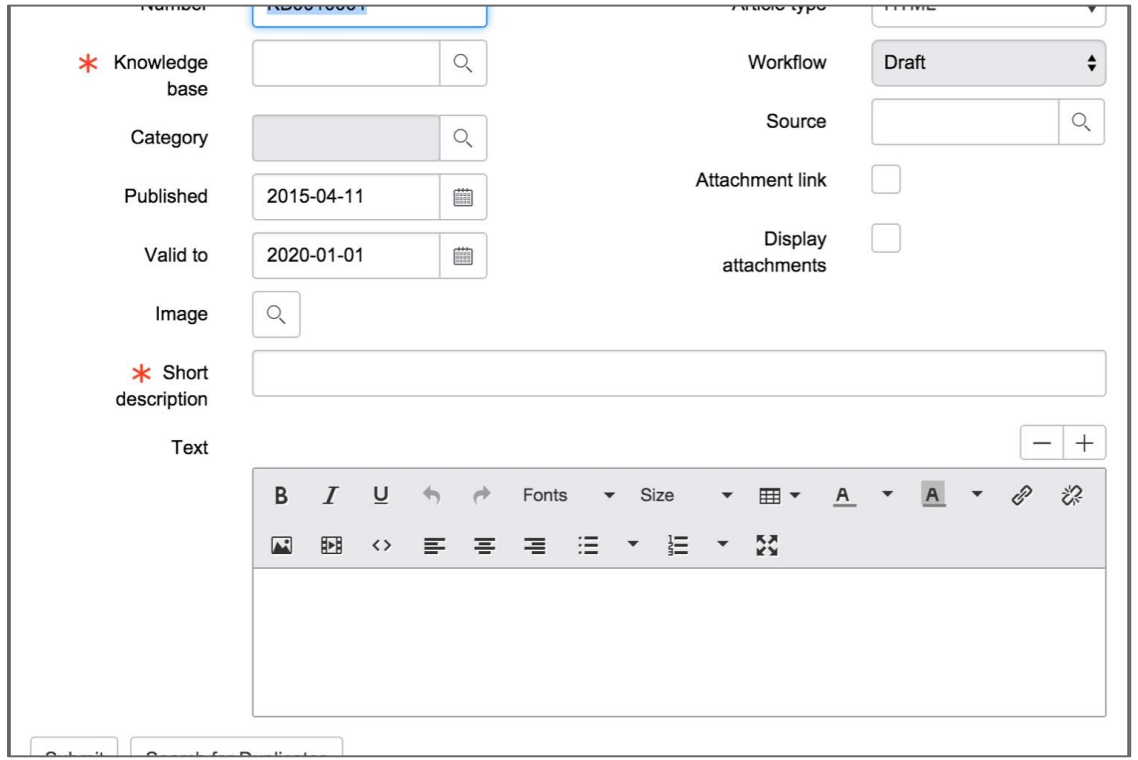
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Creating, Featuring, and Viewing Content: Share that Powerful Knowledge!

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Creating Content

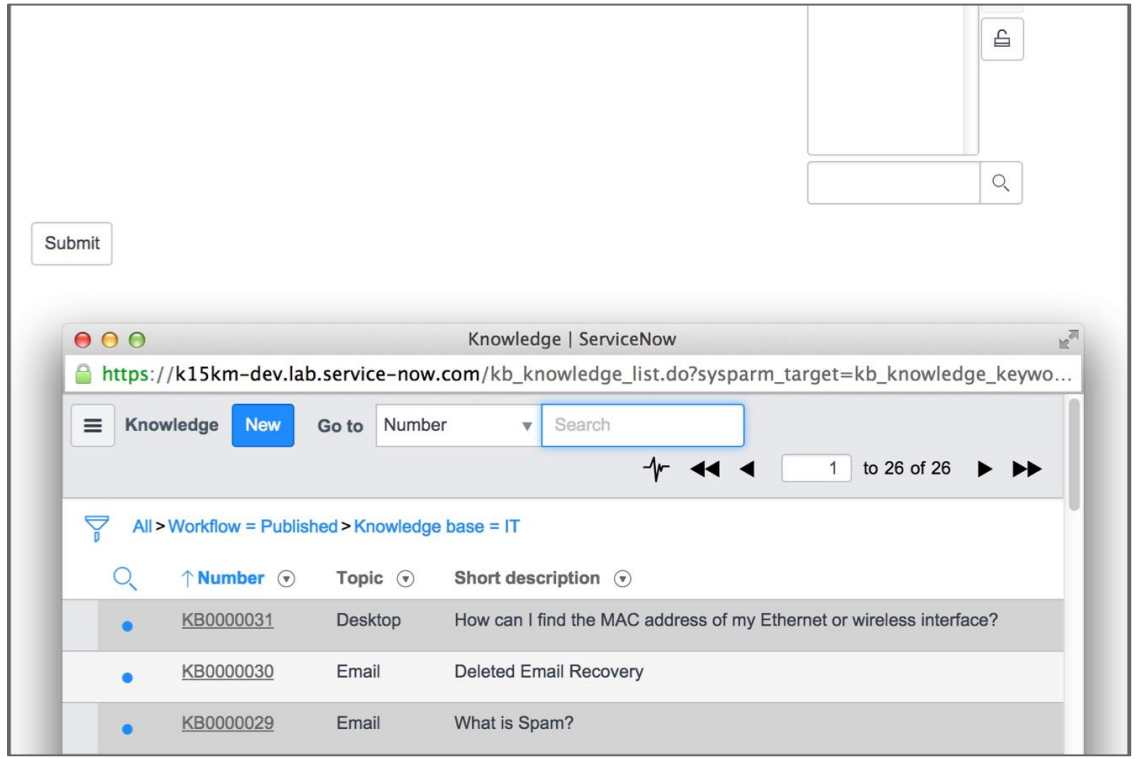
- The Create New Knowledge form is largely the same except the new fields for Knowledge Base and Category
- Ensure form views are updated in the following places if the OOB form will not be used:
  - Knowledge > My Knowledge > Create New
  - Create Content UI Action on the Knowledge Homepage
  - Edit UI Action on kb_view
  - Any custom Create KB Article UI Actions or dropdown selections



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Featuring Content

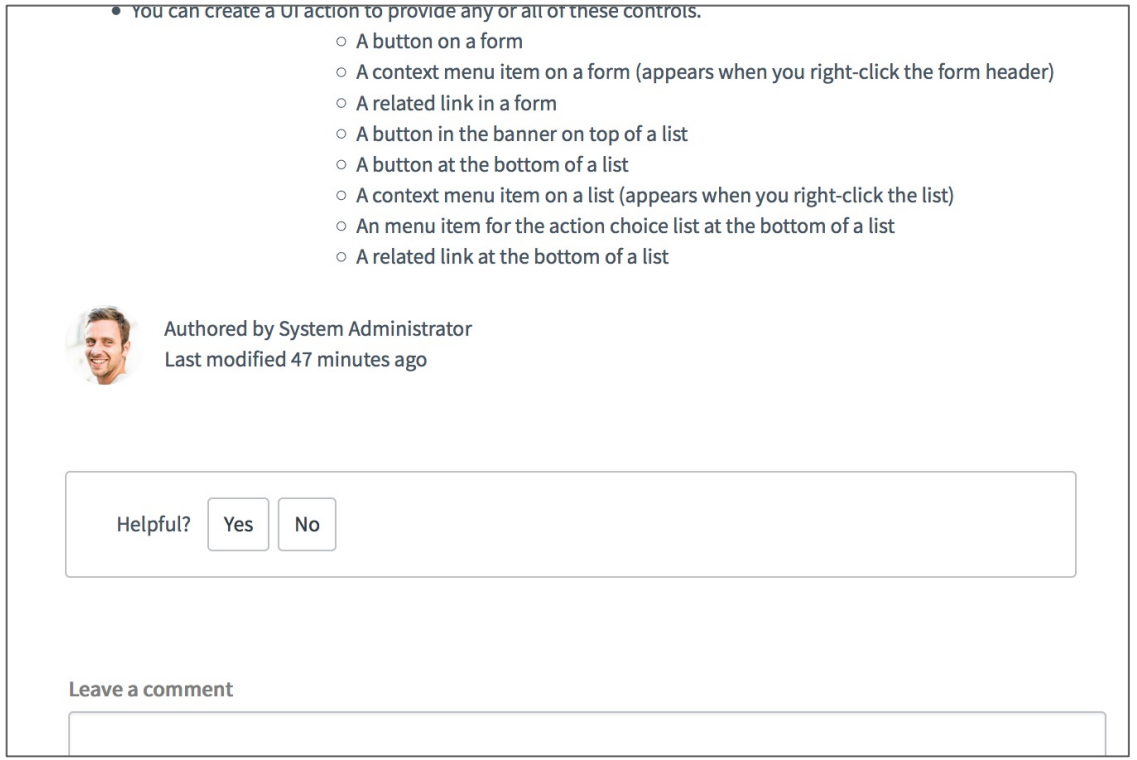
- Display pinned articles in any of the following locations:
  - Knowledge Homepage
  - A specific Knowledge Base's Homepage
  - Search Results



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Viewing Content

- Modern, configurable User Interface with the following:
  - Breadcrumbs
  - Article Flagging
  - Star Ratings
  - View Count
  - Recently attached Tasks
  - Article Information
  - Commenting (Live Feed if selected)
    - Ability to attach files to Comments
  - Permalink



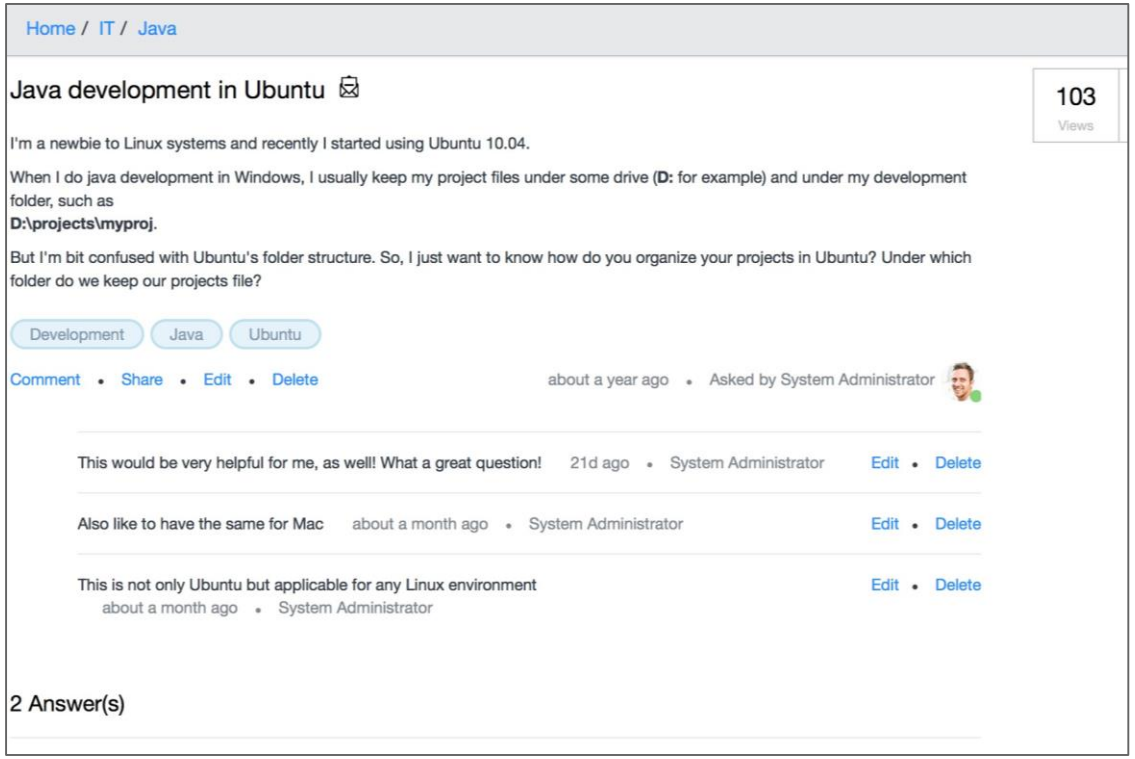
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Enabling and Using Social Q&A: Keep the Conversation Going

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Social Q&A

- With Social Q&A, users can:
  - Ask Questions
  - Answer Questions
  - Vote on Helpful Questions and Answers
  - Share Information Within Your Organization
- Questions and Answers are all associated with a knowledge base
- Locating content is easy with the same access controls, search, and homepage as knowledge articles



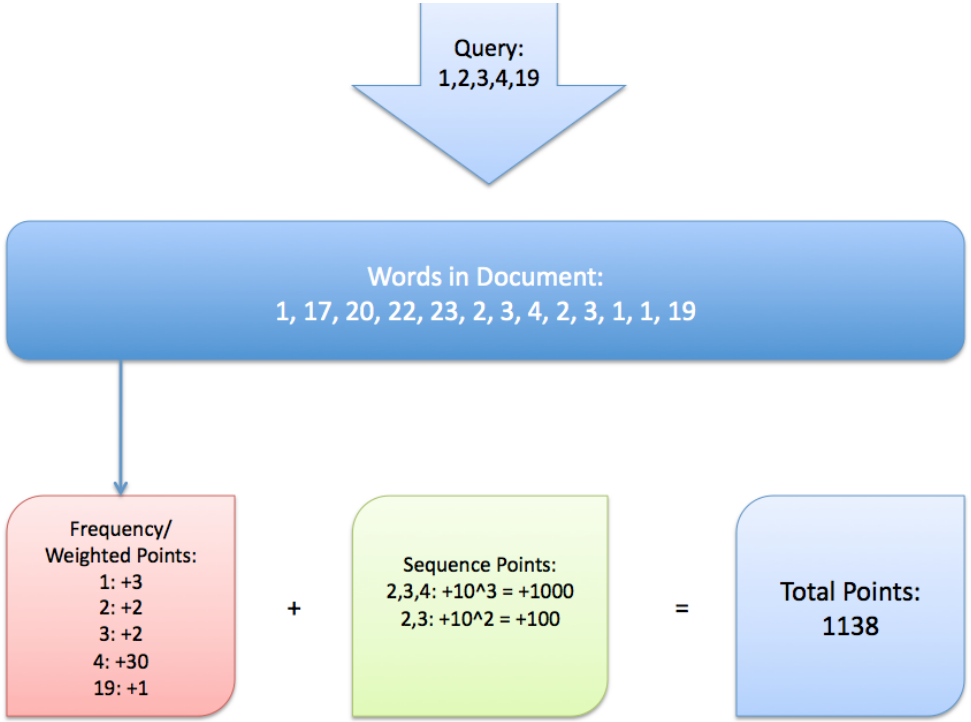
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Improving Search Effectiveness: Discoverability Is King

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Search Tips

- To improve search results, ensure the following are true:
  - All Knowledge Articles have comprehensive meta available in the Meta field
  - Articles which should always be the first result for a specific search are featured
  - Text Search Weights are appropriate for how your organization searches
  - Relevancy Scores are visible to at least Knowledge Admins



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Top Takeaways

1. Multiple Knowledge Bases for better content Structure.
2. User attribute-based reading and editing.
3. Featured Content to help users find the right content every time.

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Thank You

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Semhar Yemaneab
Sr. Solution Consultant
ServiceNow

Paul McConnon
Director, Solution Consulting Architect
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