knowledge14
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Lab Guide

Knowledge Management 201:

Beyond the Basics

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Lab instance: https://<<name>>.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

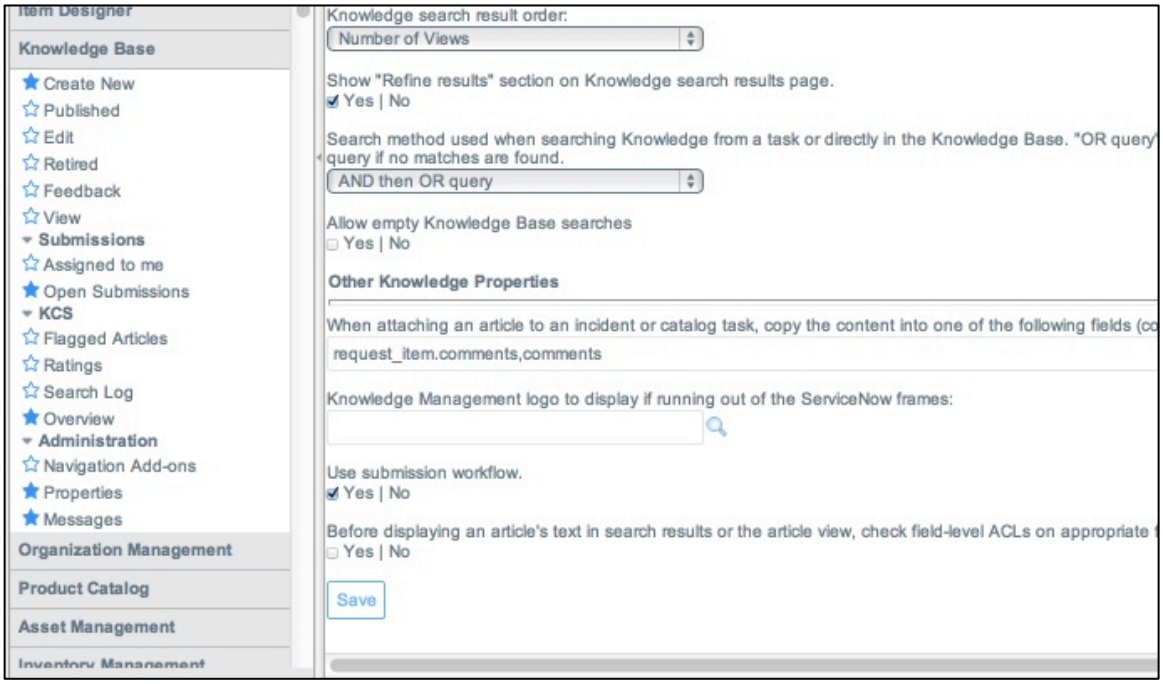
employee / Knowledge14

Lab 1 Activate the Submission Workflow

Activate the Submission workflow:

1. Navigate to **Knowledge Base > Properties**.

2. In the **Use submission workflow** field, select the **Yes** check box.



3. Click **Save**.

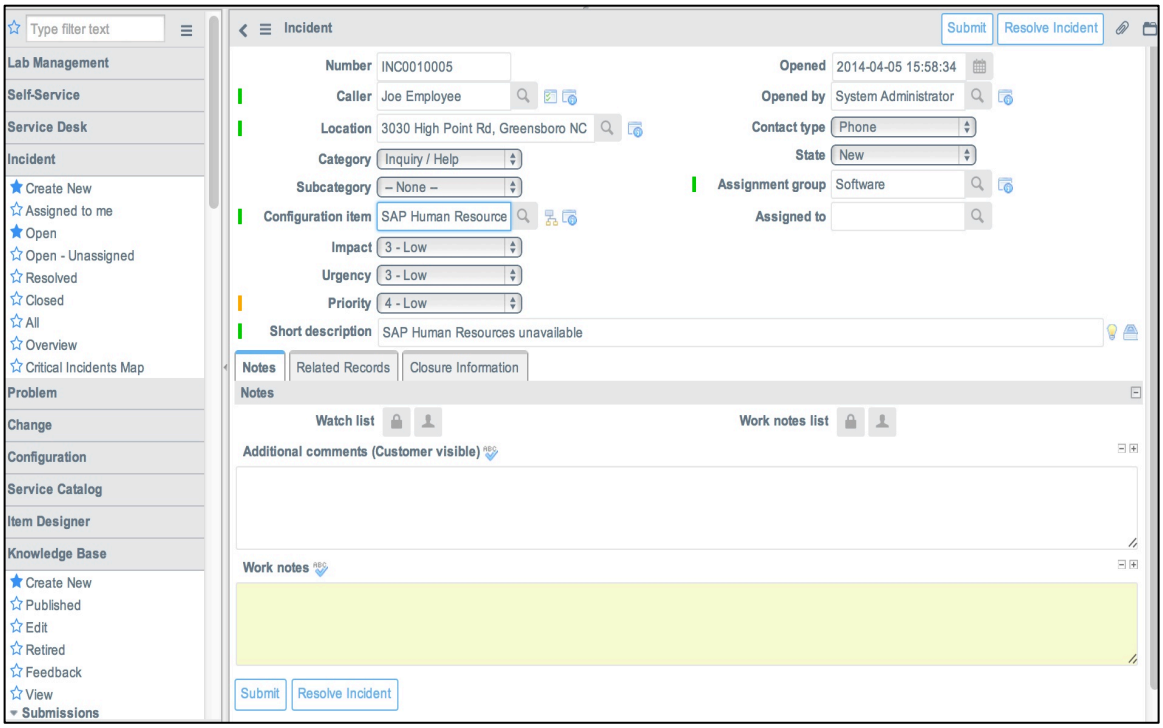
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Lab 2 Submission workflow in an incident

Create new incident

1. Navigate to **Incident -> Create New** and complete the form with the following.

   Caller: **Joe Employee**
   Configuration Item**: SAP Human Resources**
   Assignment Group: **Software**
   Short description: **SAP Human Resources unavailable**



   Right click the form header and select **Save**.

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Test Submission Knowledge Workflow: Activate Closure information

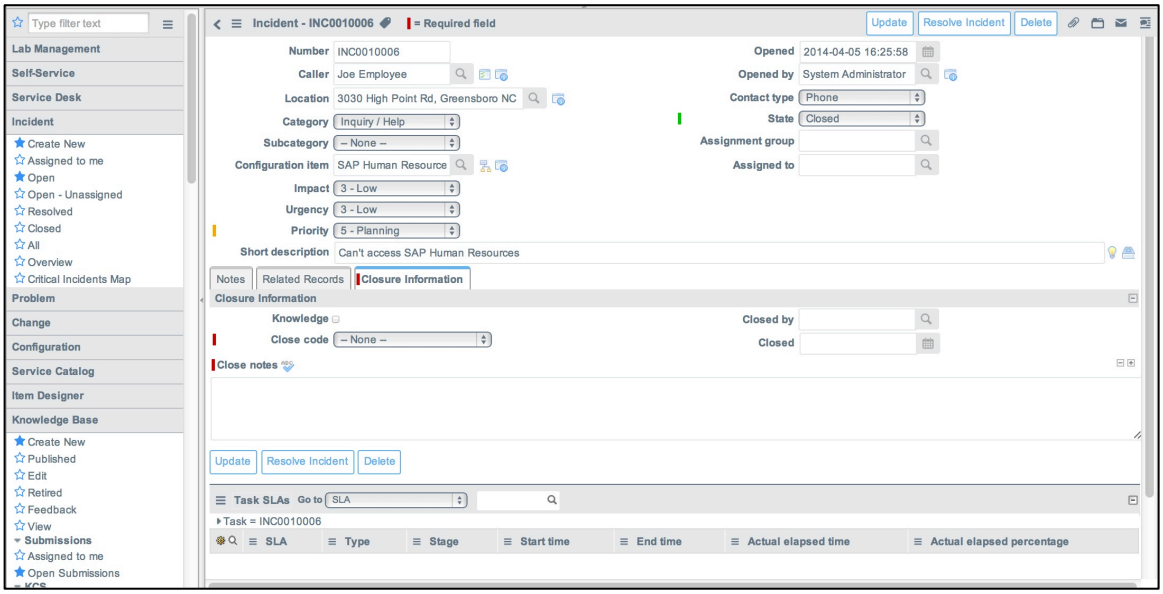
1. Set state to **Closed**.

2. Note that Closure Information becomes mandatory.

3. **Check Knowledge box**. This triggers the Submission workflow.

4. Set closed code to **Solved (Workaround)**.

5. In close notes, type **Workaround, Step 1, Step 2, Step 3.**



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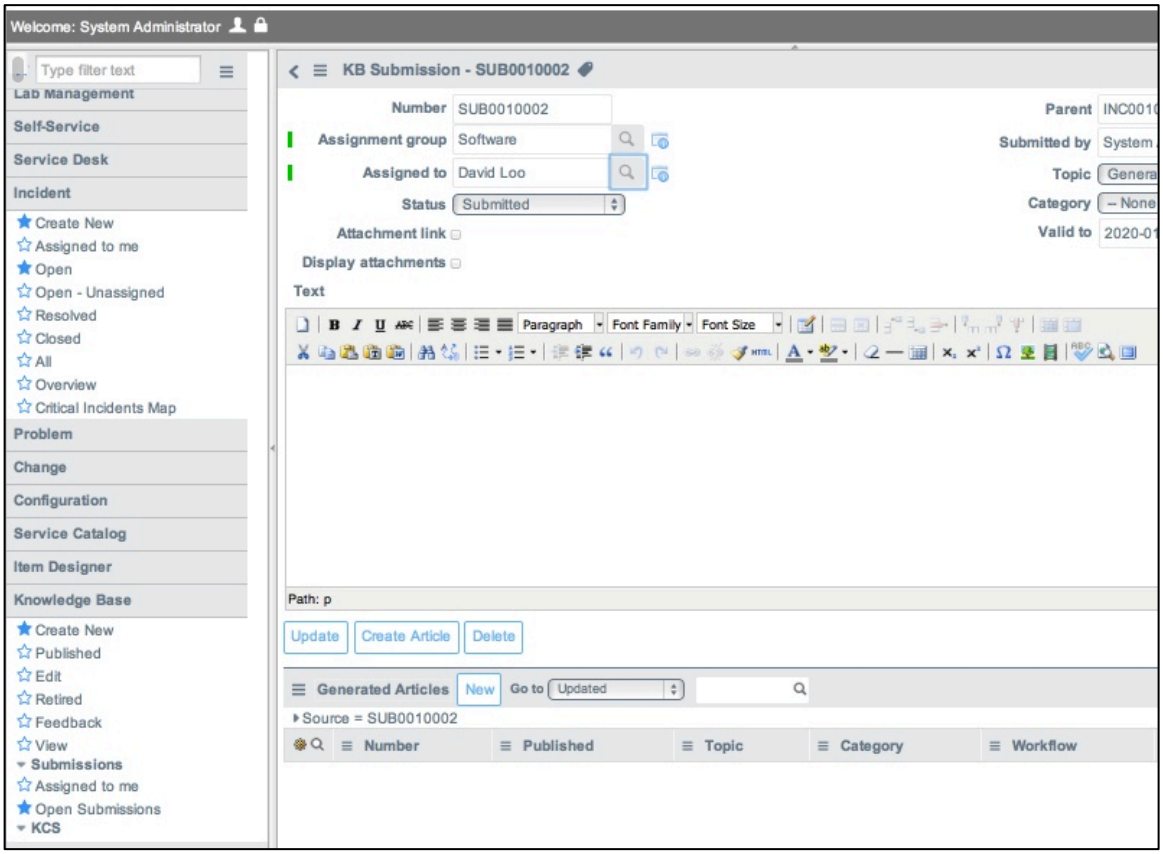
Access and assign the article submission

1. Navigate to **Knowledge Base > Submission**

2. **Open** the KB submission record created by the workflow.

3. Assign the KB submission task to **David Loo**.

4. Click **Update**.



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Knowledge worker functions

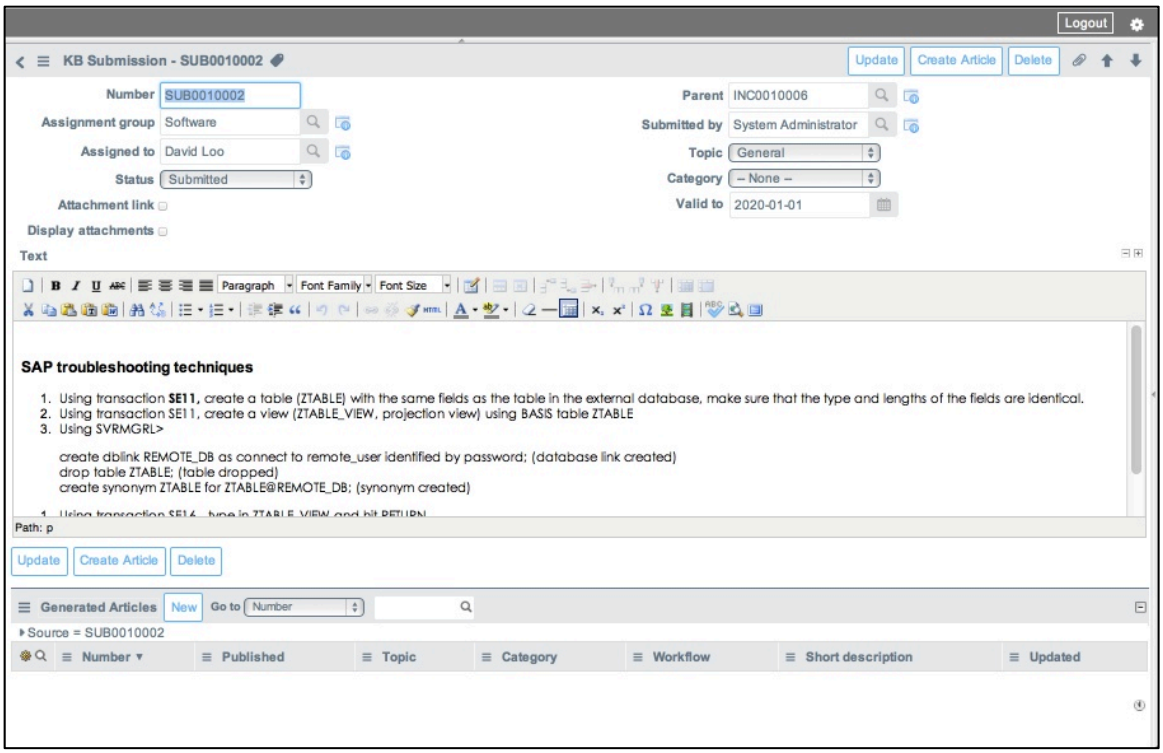
1. Click on the **Impersonate** button next to the username in the top left of the screen and select **David Loo**.



2. Access the assigned submissions through **Knowledge Base > Assigned to Me** or **Service Desk > My Work**

3. Knowledge worker reviews the submission to determine whether it represents a needed article, duplicates an existing article, or is invalid (no article needed).

4. Click **Create Article**.



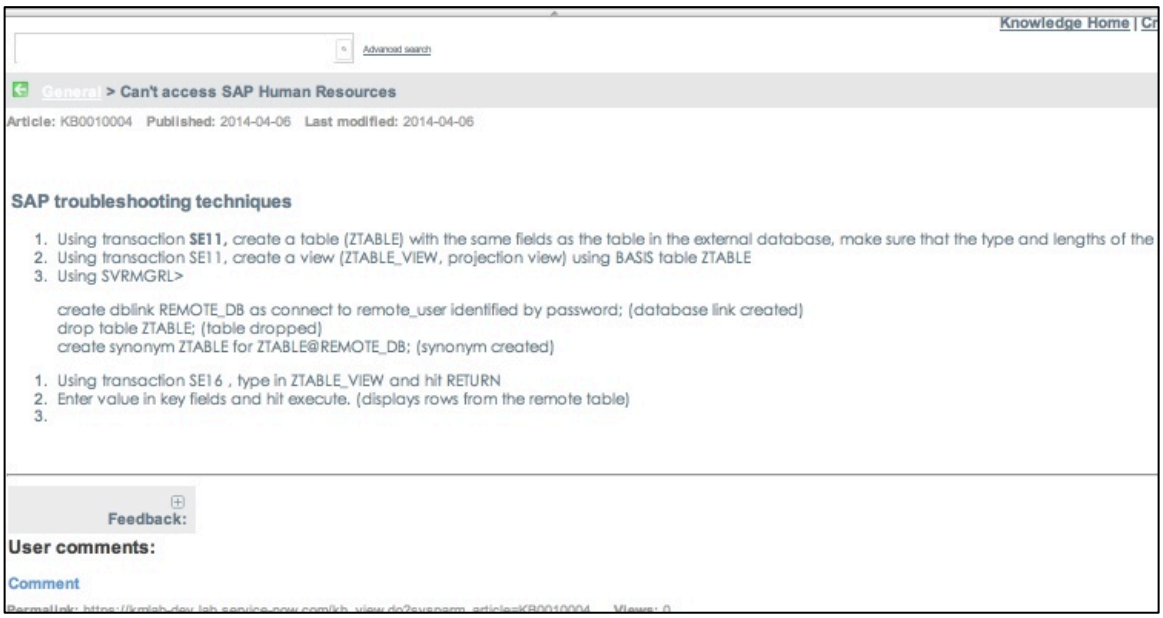
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View and review

1. From article record, click **View Article**.

2. ServiceNow notifies the technician that the submission is in progress or has been closed.

3. Knowledge management team moves new articles through the standard states: Draft, Review, and Published.



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Taxonomy and Metadata

Lab 3 Taxonomy And Metadata

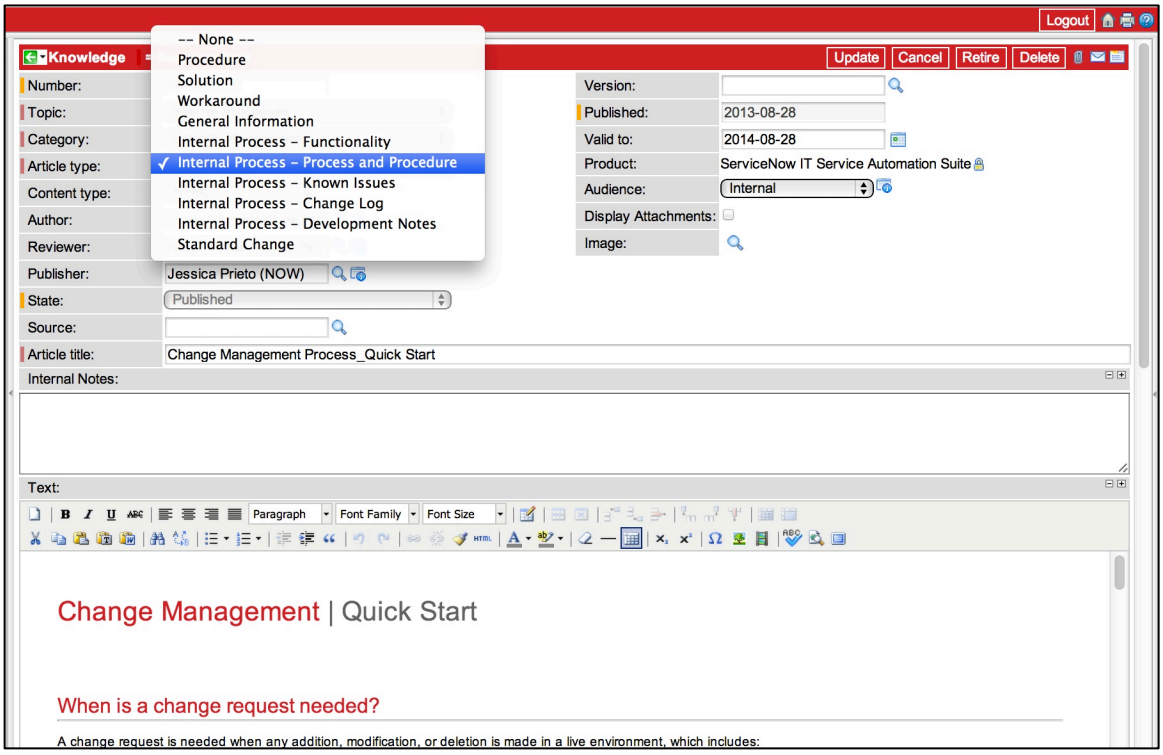
Topics: highest level of classification
Examples: HR, Support, Internal Processes

Categories: secondary level.
Examples: HR>Travel Policies, Support>FAQs, Internal Processes>Incident Management.

Subcategories:

Article Types: affect routing

Metadata: searchable tags, hidden from end user. Can be added by personalizing form.



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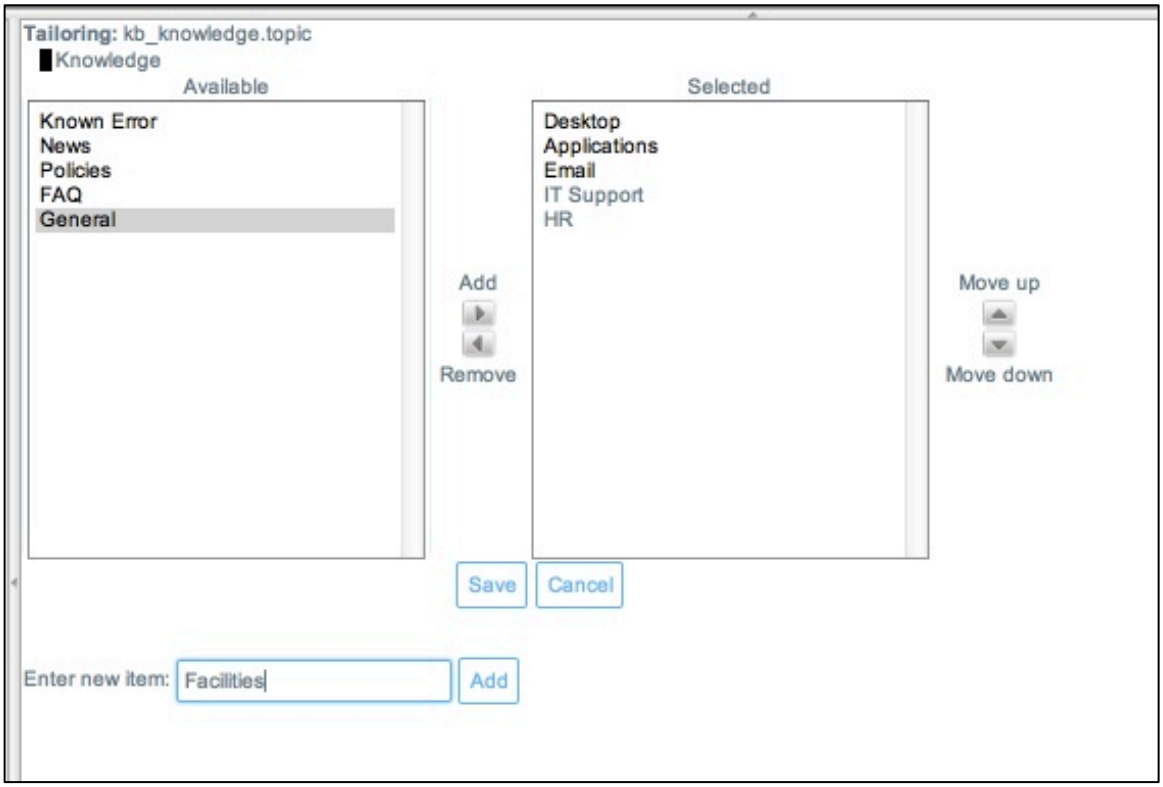
Add Topics

1. Right click **Topic** and select **Personalize Choices**

2. Remove: **Known Error, News, Policies, FAQ, General**

3. Add: **IT Support, HR, Facilities**

   Note: You may need to create **Facilities** as a new item.



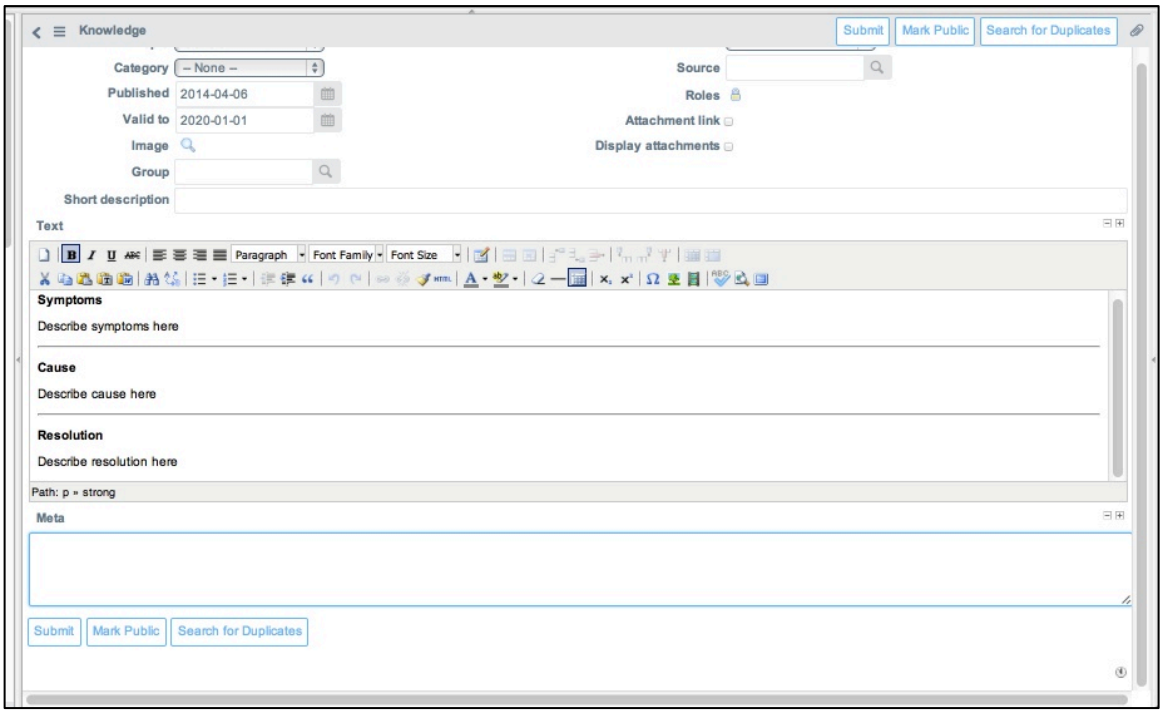
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Add Categories

1. Set **Topic** to **IT Support.**

2. Right click **Category** and select **Personalize Choices.**

3. Add: **Hardware**, **Software.**

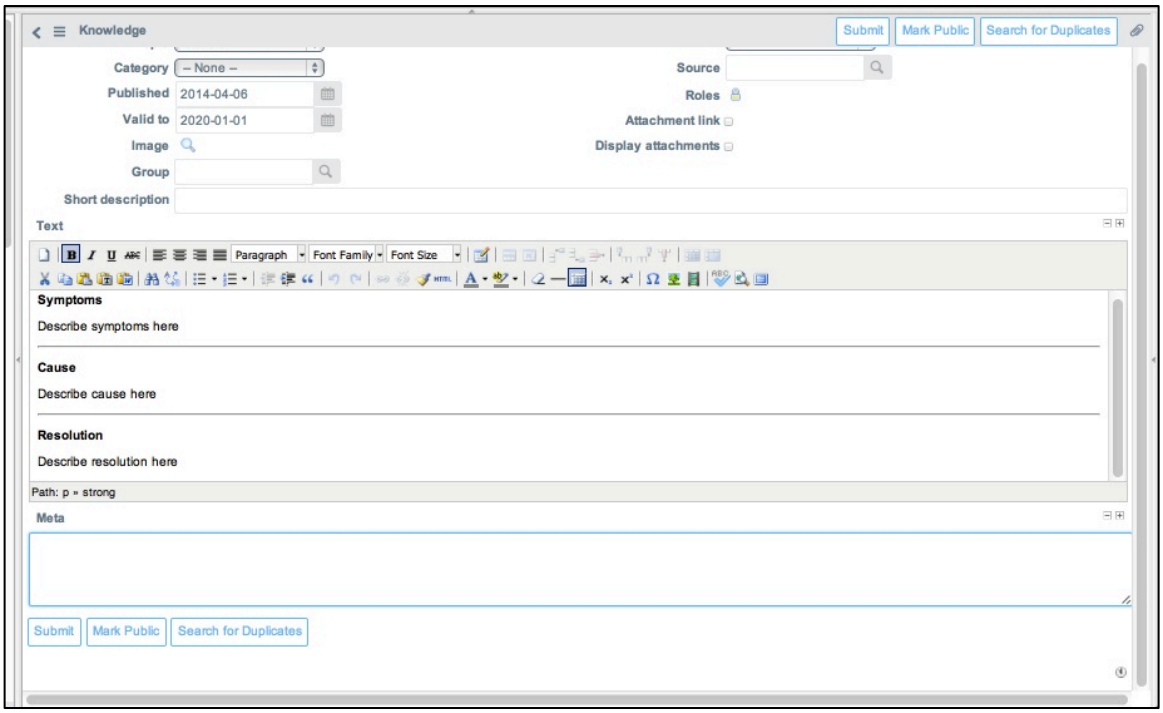


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Add Metadata

1. Right click the Knowledge Article form header and select **Personalize > Form Layout**.

2. Add **Meta** to the form below **Text**.



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Lab 4 Create Role-Based Controls

Knowledge Roles

The knowledge management process at ServiceNow utilizes the following process roles:

- **Knowledge User**: All users who create knowledge content based on their areas of expertise.
- **Technical Approver**: Members of a first-level approval group. First-level approval groups are specified in knowledge rules.
- **Knowledge Publisher**: A group of users responsible for editing and publishing articles.
- **Knowledge Administrator**: Users that administer the knowledge base.
- **Information Systems Manager**: The individual responsible for effectiveness of knowledge as a strategic tool within the company.

Knowledge Users and Technical Approvers have the **knowledge role.**

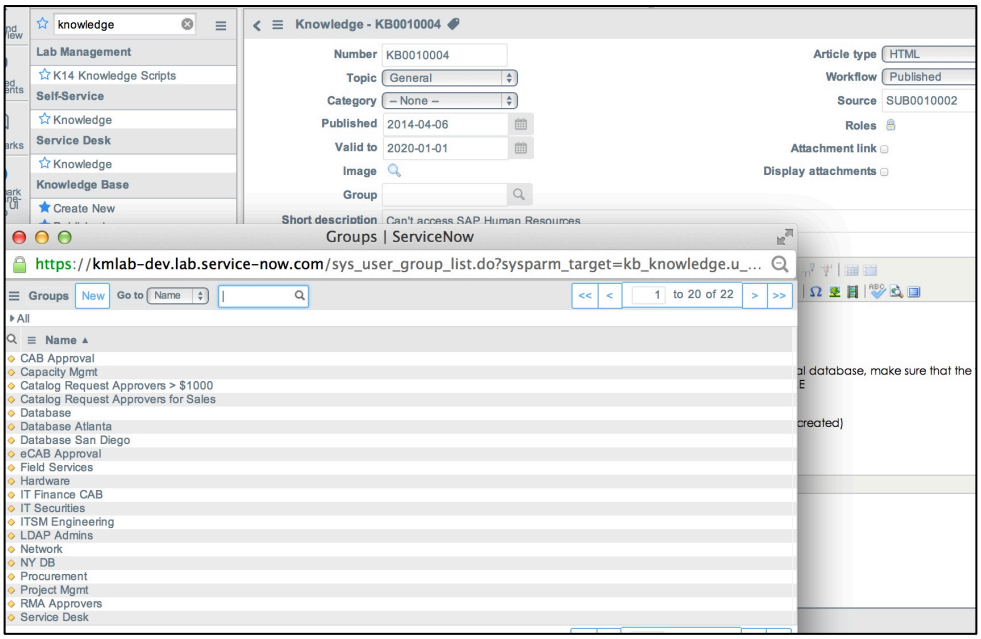
Knowledge Publishers, Knowledge Administrators and Information Systems Manager have the **knowledge_admin role.**

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Create Role-Based Controls

1. Open a **KB article.**

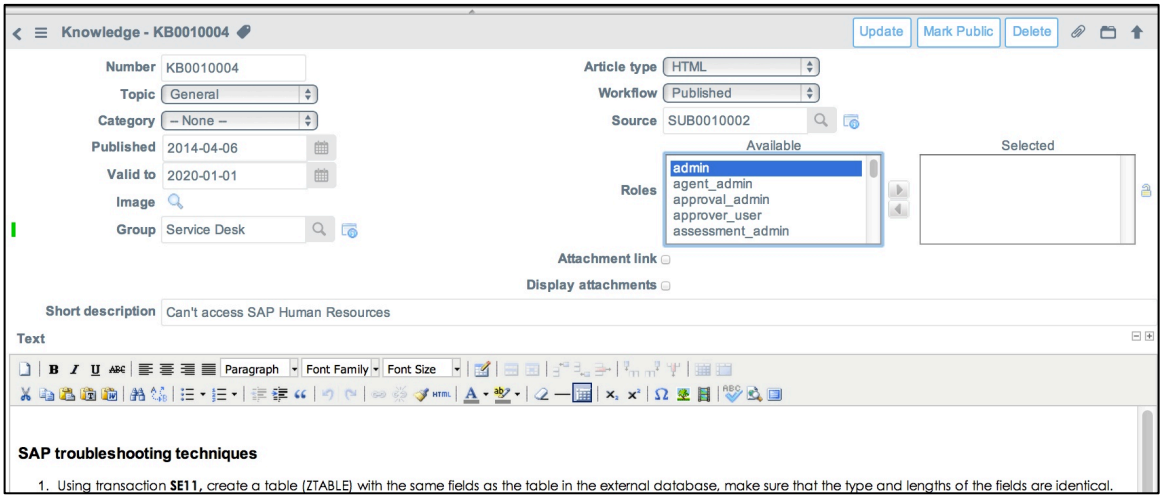
2. Click on **magnifying glass** next to Groups field. Choose **Service Desk**.



3. Click the **lock** next to Roles.

4. Choose **Admin.**

5. Now this article is accessible only to Service Desk admins.



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Lab 5 Knowledge Management Workflow

Create a Knowledge Management Workflow

1. Navigate to **Workflow -> Workflow Editor**.

2. In the Workflow Editor window, click **New**.

3. Name the workflow **KB Workflow**.

4. In the **Table** field, click the drop-down list and find the **Knowledge [kb_knowledge] table** and click it.

5. In the Condition area where it says **—choose field –** click the drop-down and select the **Workflow** field.

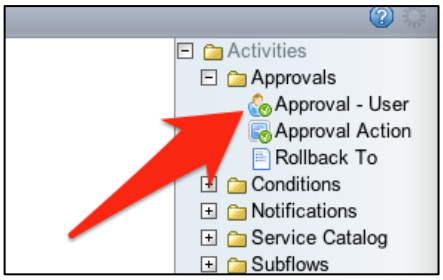
6. Click the drop-down field to the right that is labeled **—None –** and select the option **Review**.

7. Click **Submit**.

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Add an approval

1. In the top-right corner of the screen, click on the **Approval – User** activity and drag it onto the line that connects the **Start** to the **End** of the workflow. You may need to click on the **plus** sign next to the **Approvals** Folder to expand the list.

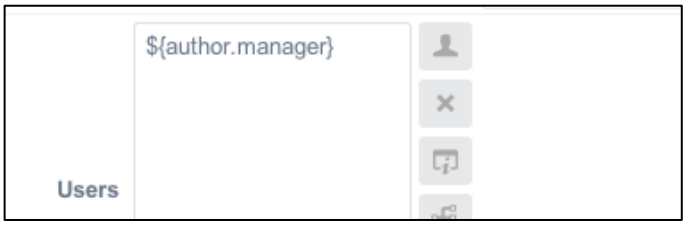


Name: **Manager Approval**

2. Click the **lock icon** next to the **Users** field and click the **Select Fields** icon.



3. In the tree picker, expand **Author** by clicking on the **plus** sign.
Click on the **Manager** item in the list (do not expand). It should look like this when you've clicked on it:



4. Click **Submit.**

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Create Approval Notification

1. In the top-right corner of the screen, click the **Approval – User** activity and drag it onto the line that connects the **Start** to the **End** of the workflow.

   Name: **KB Article Approved**
   Subject: **Your KB Article ${number} was approved**

2. Click **Submit.**

Create re-evaluation activities after 90 days

1. On right-side of screen, drag and drop a **timer** activity into the approval workflow path.

   Name: **Wait 90 Days**
   Duration: Days: **90**

2. Click **Submit.**

3. On right-side of screen, in the **Utilities** activity area, drag and drop a **Set Values** activity into the workflow path.

   Name: **Set Article to "Retired"**
   Set condition to **Workflow** is **Retired**

4. Click **Submit.**

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Lab 6 End of Lifecycle Actions

Create Retire Expired Knowledge Base Scheduled Job

1. Go to **Lab Management > K14 Knowledge Scripts**

2. Click **Retire Expired Knowledge Base Articles.**

3. **Select all text** in the Script field and right click to **Copy** it to your clipboard.

4. Go to **System Definition > Scheduled Jobs**

5. Click **New.**

6. Click the **Automatically run a script of your choosing** link.

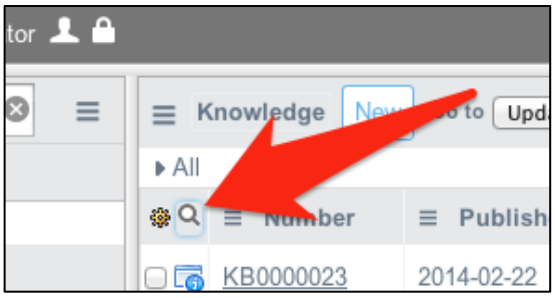
   Name: **Retire Expired Knowledge Base Articles**
   In the Script field, right click and select **Paste**

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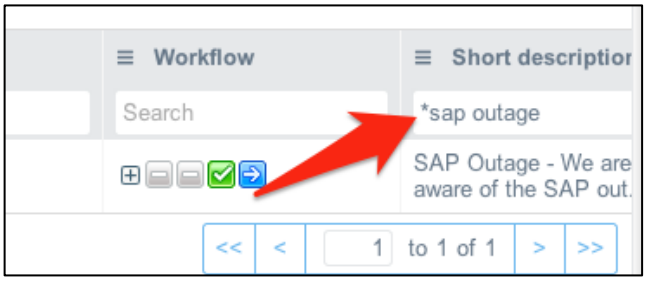
Test the Retire Expired Knowledge Functionality

1. Go to **Knowledge Base > Edit**

2. Click the **magnifying glass** icon in the top-left corner of the list.



3. In the Short Description search box, type ***sap outage**



4. Click on the article with the short description that starts with **SAP Outage**.

5. Notice the **Workflow** field is set to **Retired.**

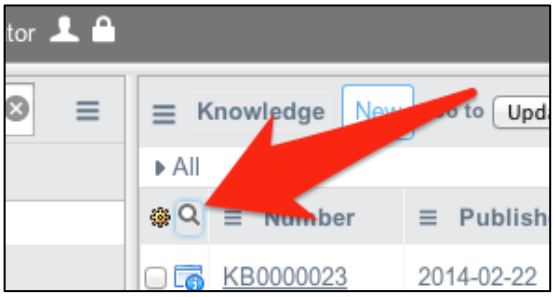
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Lab 7 Group-Based Controls

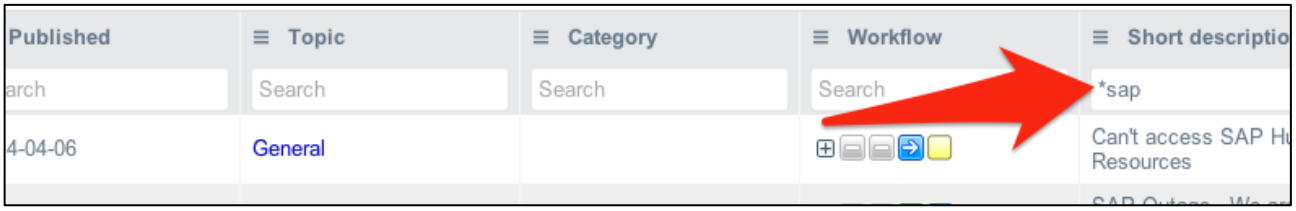
Set up Group field on the Knowledge form

1. Go to **Knowledge Base > Edit**

2. Click on the **magnifying glass** icon in the top-left corner of the list.



3. In the Short Description search box, type ***sap**

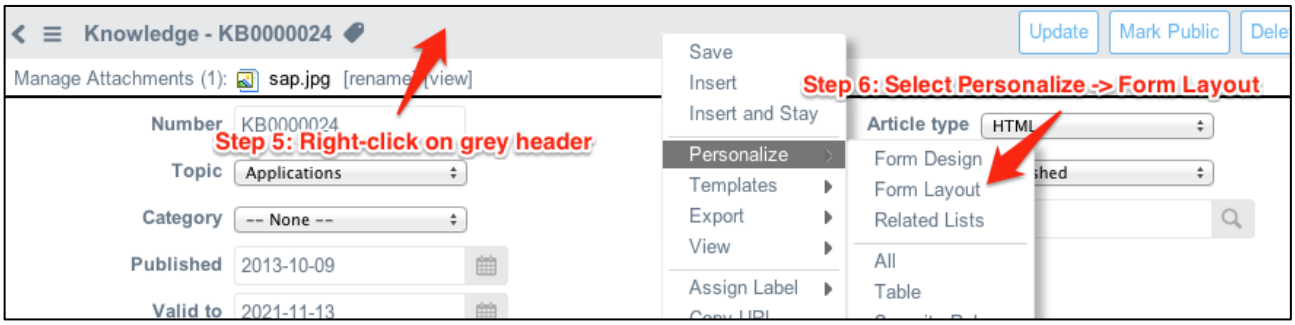


4. Click the article with the short description **Can't access SAP.**

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5. Right on the grey top of the form (see picture below).

6. Select **Personalize > Form Layout**



7. In the bottom right-hand corner of the **Form Layout page** there is a **Create new field** dialog box. Add a new field with these properties:

   Name: **Group**
   Type: **Reference**
   Table to reference: **Group [sys_user_group]**

8. Click **Add.**

9. Scroll to the bottom of the list on the right to find the **Group** field you just added.

10. Click the **Group** field.

11. Click the **Up** arrow to the right of the list to position the **Group** field below the **Image** field.

12. Click **Save** below the two lists to return to the form.

13. In the newly added **Group** field, type **Software** and select the **Group** that appears.

14. Click **Update** on the Knowledge form to save the change.

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Add the Group Business Rule

1. In the Application Navigator, click on **Lab Management > K14 Knowledge Scripts**

2. Click on the script named **Group Separation in Knowledge Base.**

3. Select all the text, right click on it, and select **Copy.**

4. Navigate to **System Definition > Business Rules**

5. Click the **New (Advanced)** button at the top of the list.

6. Fill out the following attributes:

   Name: **Group Separation in Knowledge Base**
   Table: **Knowledge [kb_knowledge]**
   When: **before**
   Query: **check the box**

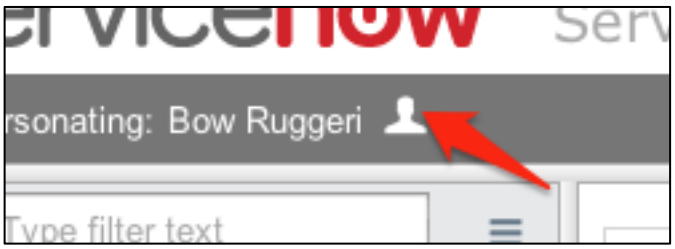
   (Click on the **Actions** tab) and click on the **plus** sign next the script field.
   Right click in the script field and **Paste** the script you copied to the clipboard earlier.

7. **Save** the business rule.

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Test the Business Rule

1. Click on the **Impersonate** button next to the username in the top left of the screen.



2. Type in the name **David** and select **David Loo** from the list.

3. Navigate to **Self-Service > Knowledge**

4. In the search bar, search for the term **SAP** and press the **"Enter" button** on your keyboard.

5. Notice that the **Can't access SAP** article is in the list of search results.

6. Now, Click **Impersonate** again and type **Bow**. Select **Bow Ruggeri** from the list.

7. Navigate to **Self-Service > Knowledge**

8. In the search bar, search for the term **SAP** and press the **"Enter" button** on your keyboard.

9. Notice that Bow cannot see the **Can't access SAP** article.

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Lab 8.0 Prioritizing Knowledge Articles

Create Pareto Chart of Incidents by Configuration Item

1. Navigate to **Reports > View/Run**

2. Click **New.**

   Name: **Incidents by Configuration Item**
   Type: **Pareto Chart**
   Table: **Incident**
   Group by: **Configuration Item**
   Other Threshold: **Remove Other**
   Condition: **(Configuration Item) (is not empty)**

3. **Save** the report.

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Create Pareto Chart of Incidents by Assignment Group

1. Navigate to **Reports > View/Run**

2. Click **New**

   Name: **Incidents by Configuration Item**
   Type: **Pareto Chart**
   Table: **Incident**
   Group by: **Assignment Group**
   Other Threshold: **Remove Other**
   Condition: (**Assignment Group) (is not empty)**

3. **Save** the report

Create Pareto Chart of Problem by Configuration Item

1. Navigate to **Reports > View/Run**

2. Click **New**
   Name: **Incidents by Configuration Item**
   Type: **Pareto Chart**
   Table: **Problem**
   Group by: **Configuration Item**
   Other Threshold: **Remove Other**
   Condition: **(Configuration Item) (is not empty)**

3. **Save** the report

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Lab 9 Proactively Display Knowledge

Proactively Display Knowledge from the Short Description Field

1. Navigate to **Lab Management > K14 Knowledge Scripts**

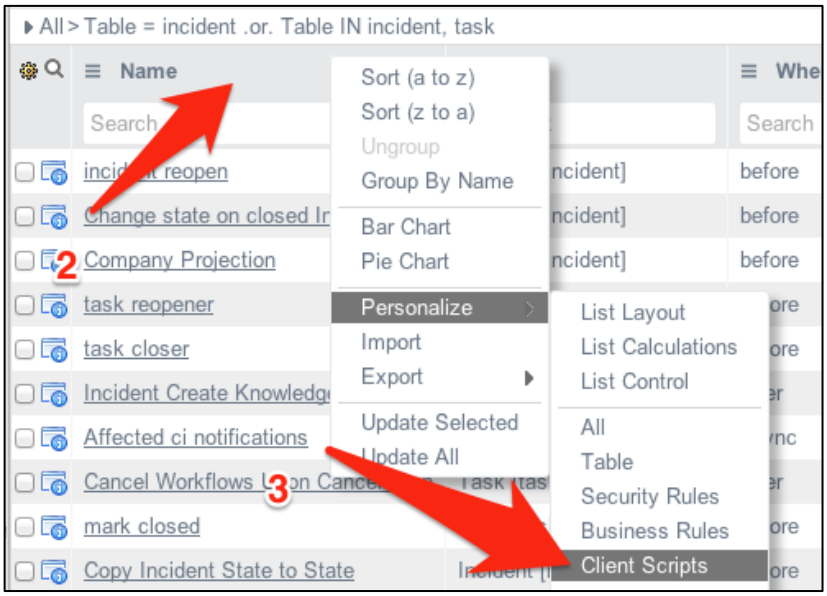
2. Click **Proactive Knowledge on Short Description.**

3. **Select all text** in the Script field and right click to **Copy** it to your clipboard.

4. Navigate to **Incidents > Open**

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5. Right-click on **column headers** at the top of the list and select **Personalize > Client Scripts**



6. Click **New**

   Name: **Display Knowledge on Short Description**
   Type: **OnLoad**
   Script: Select all, then right-click and select **Paste**
   Click **Update** to save the Client Script.

7. Navigate to **Incidents > Open**

8. Click on any incident to drill into the incident record.

9. In the **Short Description** field, select all the text and replace it with **can't access sap**

10. Click on another random field on the form.

11. Notice the popup Knowledge Article suggestions.

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