knowledge14®

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Knowledge Management 101

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servicenow®

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Knowledge Management 101
Beyond Writing Articles

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Presenter Introductions

- **Roy Scheer**
  - Facts
  - Facts
  - Facts
  - Facts



- **Wally Marx**
  - Wiki
  - Miki
  - Sliki
  - Kliki



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Objective

Set up a quick Knowledge Management system with roles and groups, tagging and taxonomy. Then take it a step further and create a content lifecycle with metrics and reporting.

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Agenda

Knowledge Management in ServiceNow 2014

Cornerstones of a Solid Knowledge Management Program

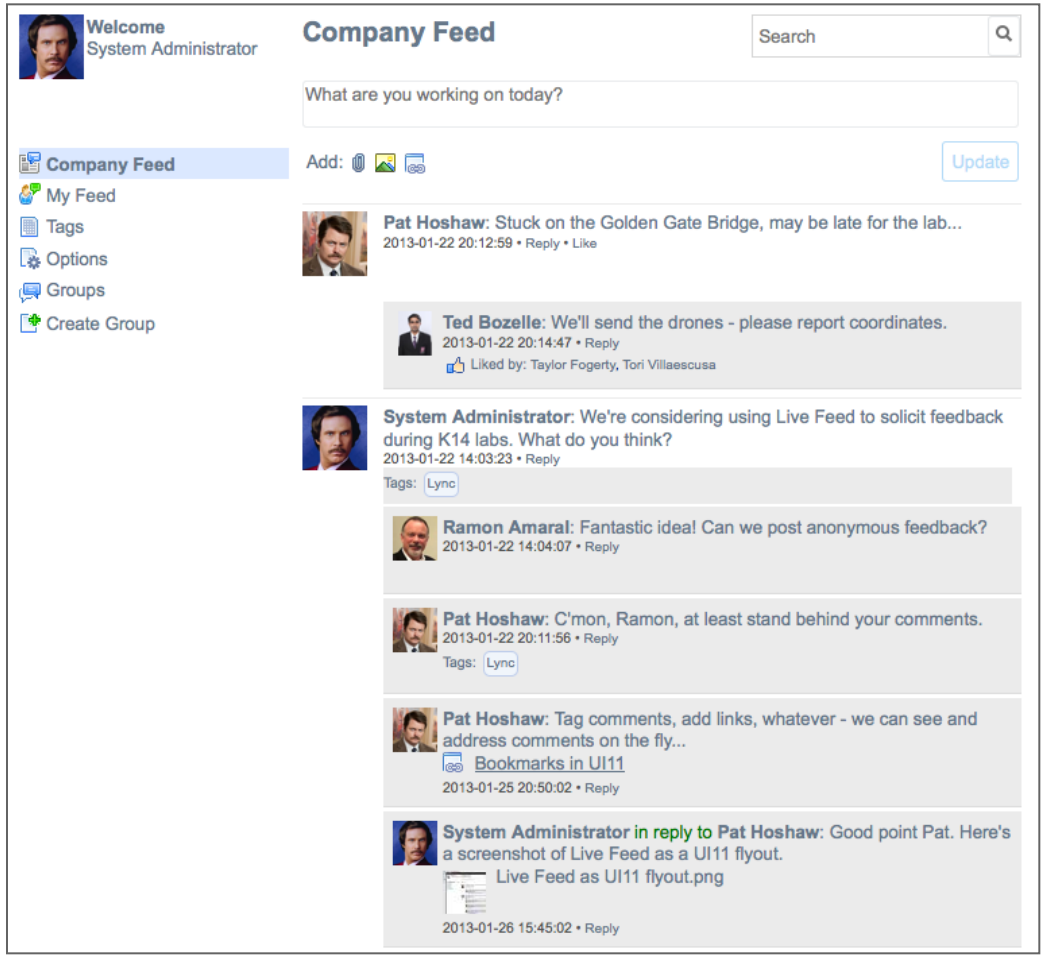
Lab Section 1: Top Moves

Lab Section 2: Taking it a Step Beyond

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Knowledge Management K14 Live Feed

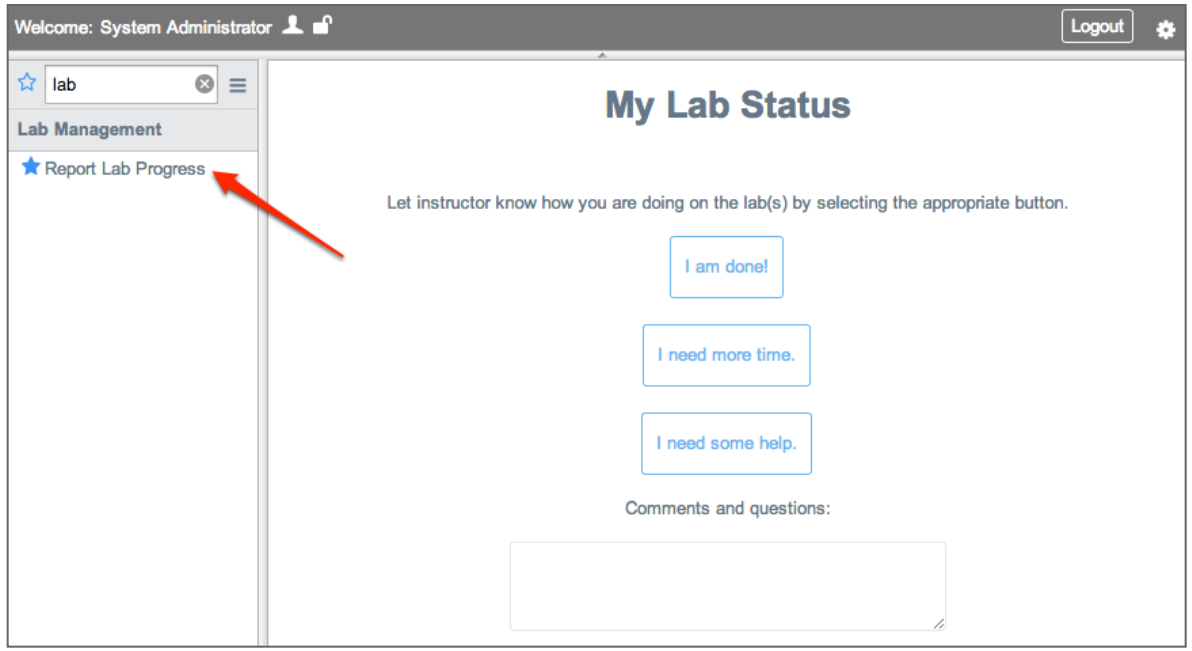
- We want to hear what you have to say!
- Post any comments / questions to the K14 Portal Live Feed Group: KM
- We'll check in periodically to address your feedback.



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Lab Progress Tracker

- Use the Lab Progress Tracker to help us monitor progress and adjust pace.
- Navigate to **Lab Management > Report Lab Progress** to report progress or comment on each lab.



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Audience Poll

- Does your organization currently utilize a Knowledge Management solution?
- If so, is it ServiceNow or another?
- What benefits / struggles have you experienced?
- Does Knowledge integrate across your existing solution?



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Knowledge Management in 2014

- Knowledge Management is something everybody wants, but few can make reality
  - "No time"
  - F.O.W.
- Knowledge management isn't just a Knowledge Base
  - People, processes, tools, content.
  - *Results*.
- Some companies set up the knowledge base and…
  - It loses momentum.
  - It quickly goes out of date.
  - It becomes a dumping ground.

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Why Knowledge Management in ServiceNow?

- ServiceNow Knowledge Management is fully integrated
  - Incident, Problem, and Change
  - Search on
  - Attach to
  - Create from
- ServiceNow Knowledge is designed to be
  - Deflection tool
  - New, useful, relevant
- ServiceNow Knowledge can go further
  - Extending functionality
  - Addressing audiences

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Lab Overview

- Sr. management has determined that we need to drive down call volume and that the way to do it is with a knowledge base.





- We agree that knowledge is good. But what we know is that just setting up a knowledge base won't by itself drive down call volume.

We need to create a system that will create useful content, get it in front of the users, and get it out of the system once it's outlived its usefulness.

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Base Functionality: Roles

- Knowledge
  - Can write, edit, and review knowledge management articles
- Knowledge_admin
  - Can write, edit, and review knowledge management articles
  - Can manage the Knowledge Base

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Base Functionality: Workflows

- **Standard**: new articles created from incidents and problems are treated the same as articles created manually by knowledge management team members. All new articles create a knowledge record and can be edited through the Knowledge form. The article moves through **Draft**, **Review**, and **Published** workflow states.

- **Submission**: articles created from incidents and problems become article *submissions*. Knowledge management team members review the information and determine whether to create a new article, update an existing article, or take no action.

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Benefits of the Task-Based Knowledge Workflow

- The task-based knowledge submission workflow offers these advantages:
  - Knowledge submissions can be assigned to knowledge workers outside the knowledge management team.
  - Knowledge submissions appear on the knowledge worker's **Service Desk > My Work** queue.
  - Knowledge submissions appear on task-based work reports so knowledge workers get credit for working on knowledge.
  - Automated feedback to knowledge submitters lets them know their submission is being worked on.

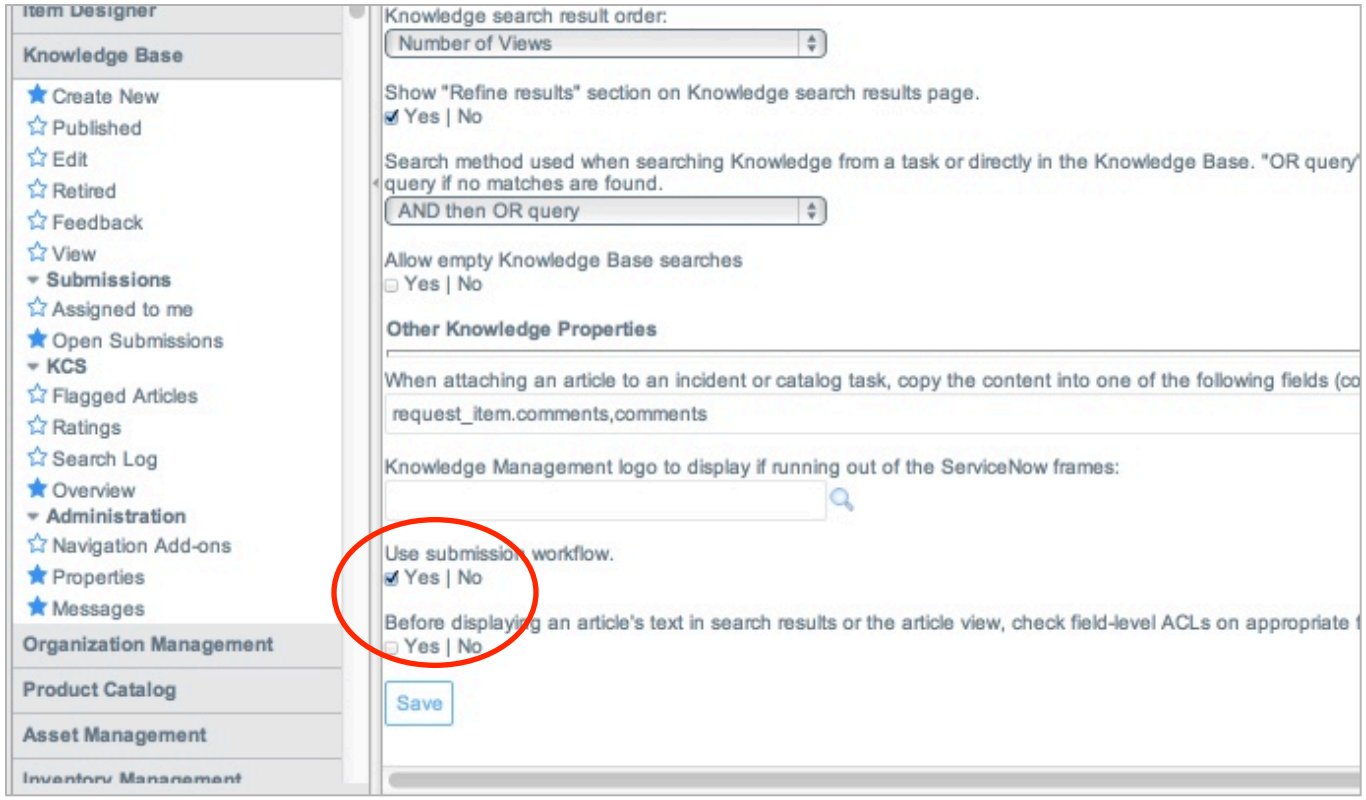
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Lab 1 (1/1)

Enable a Submission Knowledge Workflow for Incident

Activate the workflow:

1. Navigate to Knowledge Base > Properties.
2. In the Use submission workflow field, select the Yes check box.
3. Click Save.

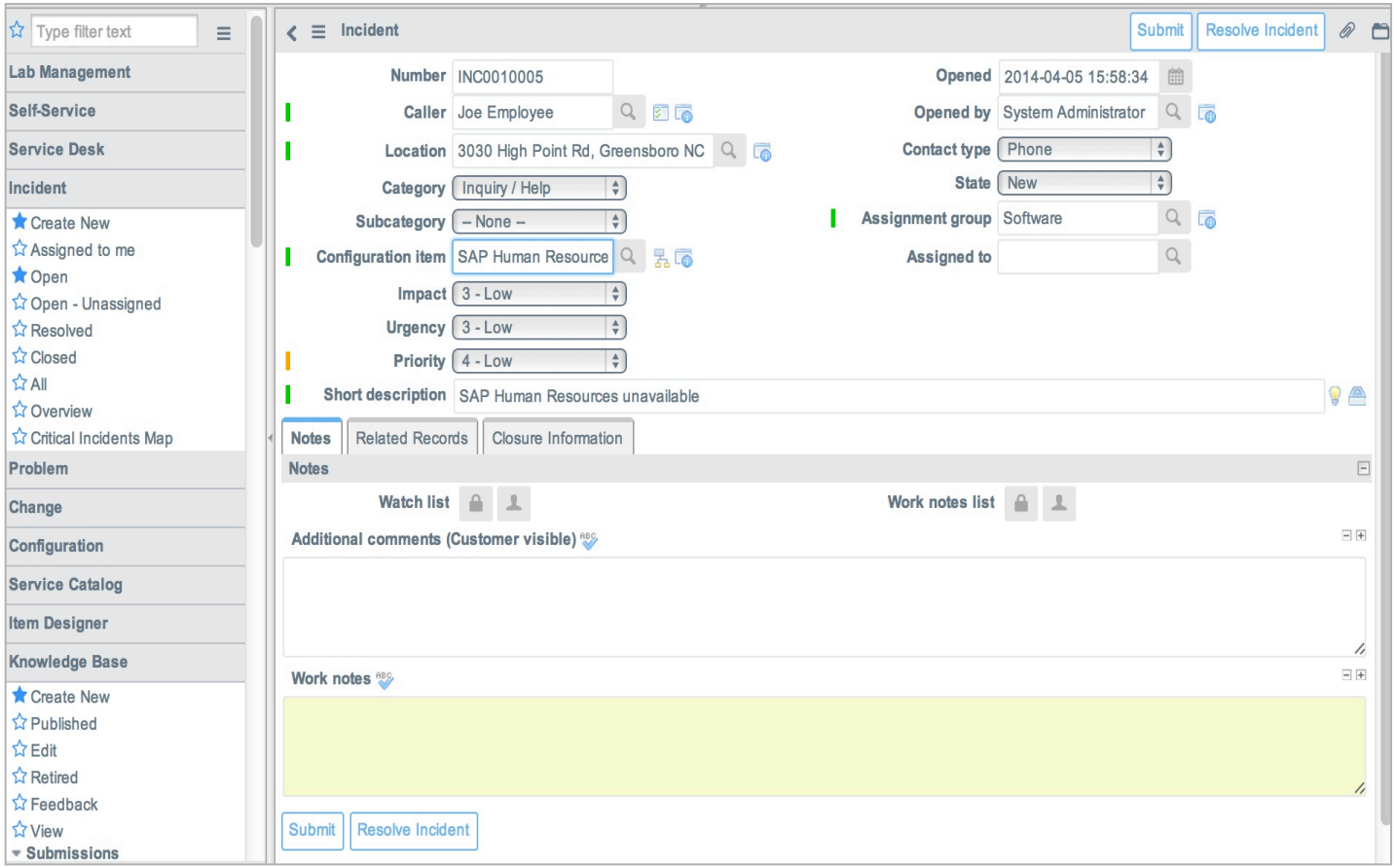


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Lab 2 (1/5)

Test Submission Knowledge Workflow

- Create new incident
- Fill out following information:
  - Caller: Joe Employee
  - Configuration Item: SAP Human Resources
  - Assignment Group: Software
  - Short description: Can't access SAP Human Resources
- Save

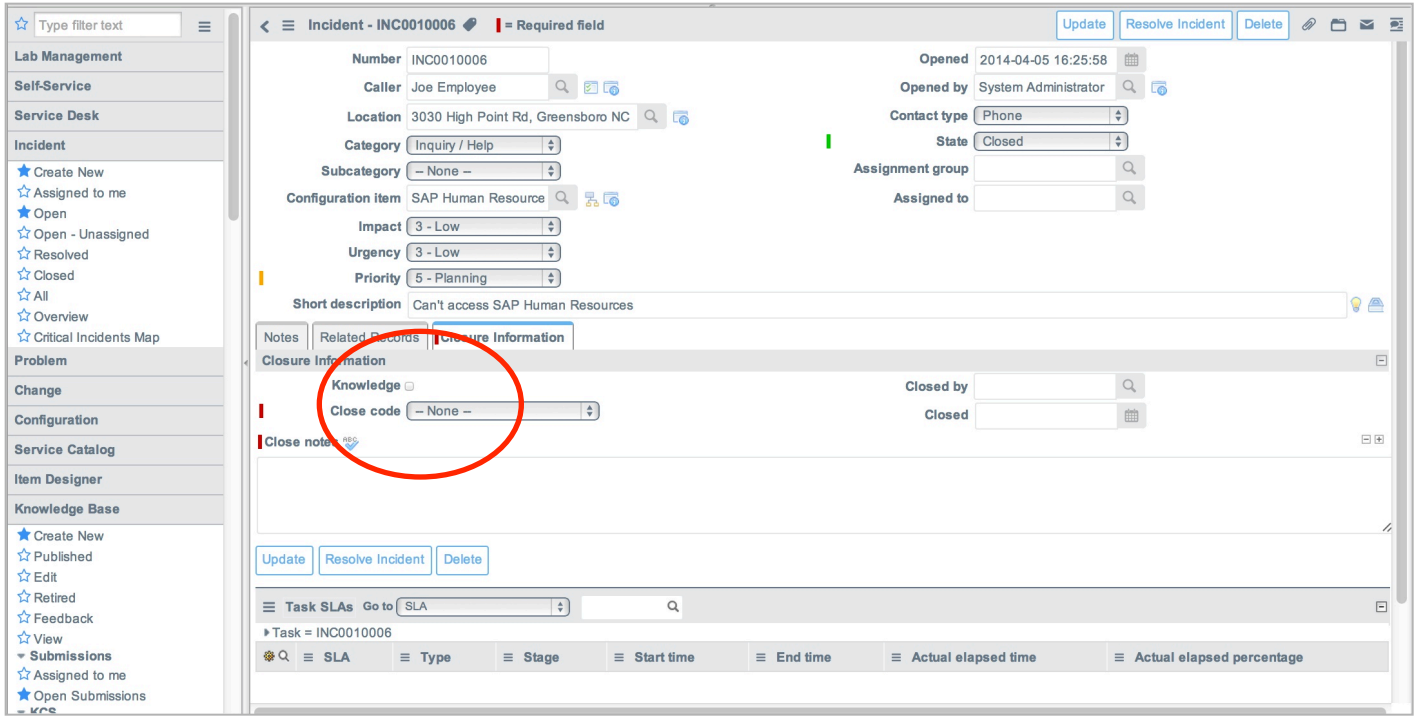


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Lab 2 (2/5)

Test Submission Knowledge Workflow

- Now set state to Closed
  - Note that Closure Information becomes mandatory
- Check Knowledge box.
  - This triggers Submission workflow
- Set closed code to Solved (Workaround)
- In close notes, type
  - Workaround, Step 1, Step 2, Step 3



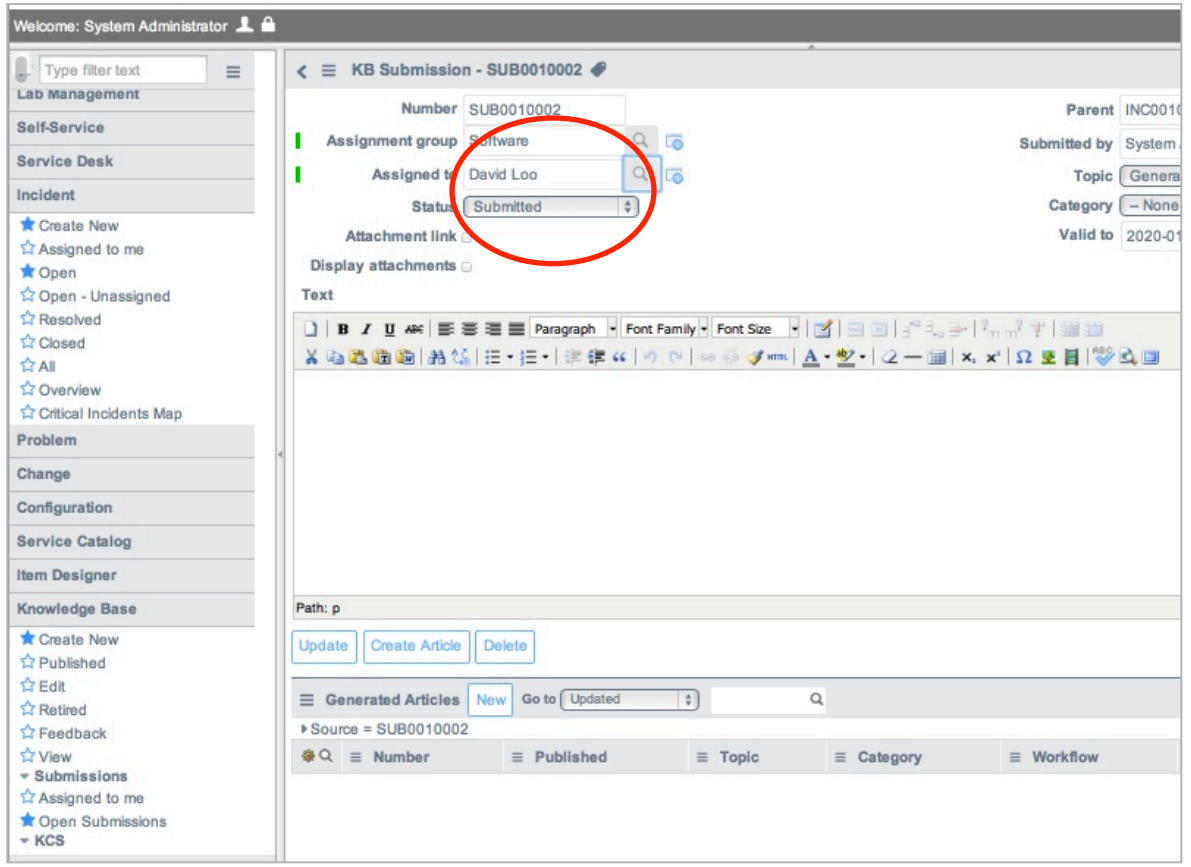
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Lab 2 (3/5)

Test Submission Knowledge Workflow

Access and assign the article submission:

- Navigate to **Knowledge Base > Submission**
- Find *knowledge submission* record, not a knowledge article.
- Assign the knowledge submission task to David Loo.
- Click **Update**.



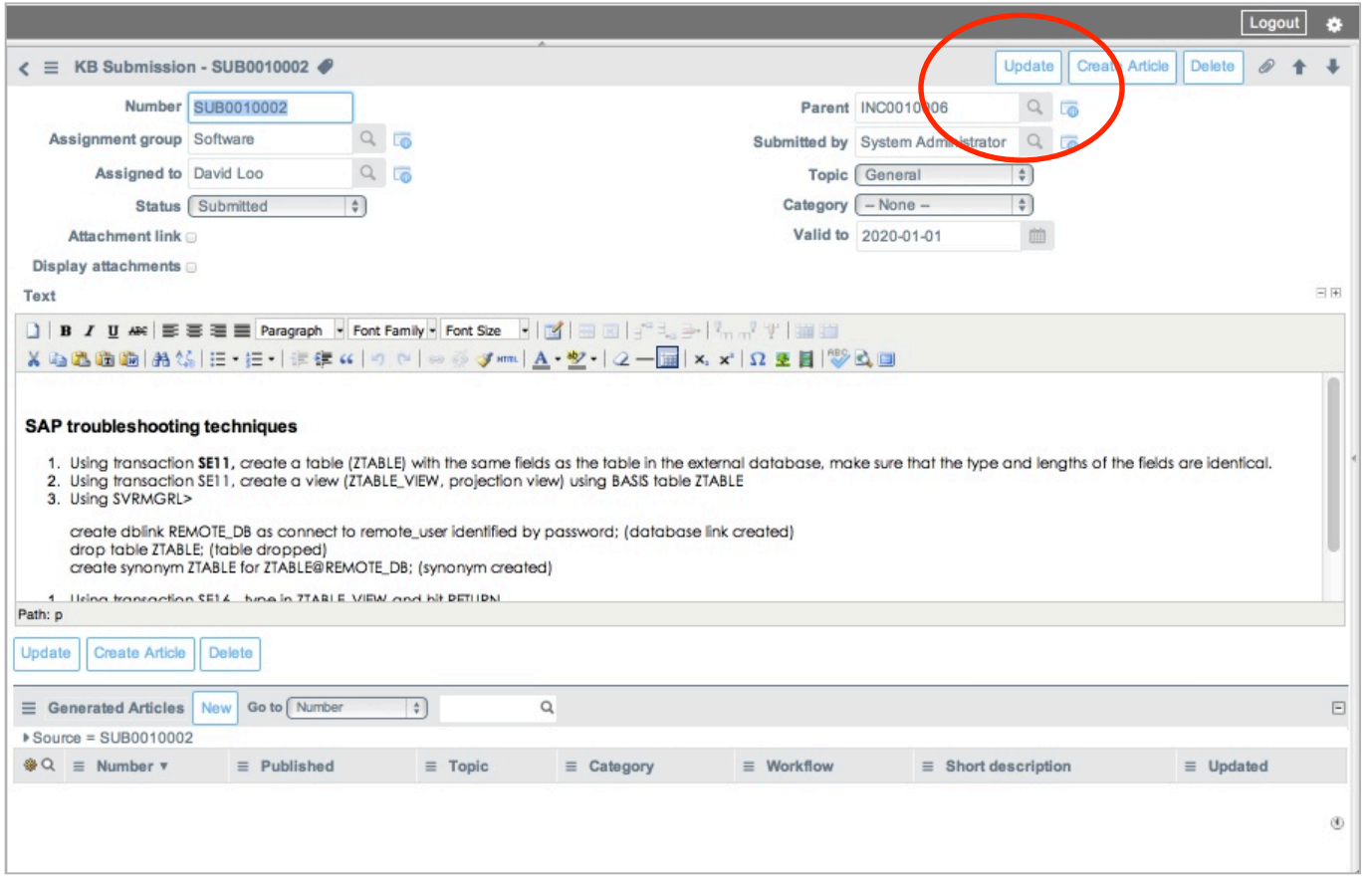
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Lab 2 (4/5)

Test Submission Knowledge Workflow

Knowledge worker functions:

- Impersonate David Loo
- Access the assigned submissions through **Knowledge Base > Assigned to Me** or **Service Desk > My Work**.
- Knowledge worker reviews the submission to determine whether it represents a needed article, duplicates an existing article, or is invalid (no article needed).
- Click **Create Article**.

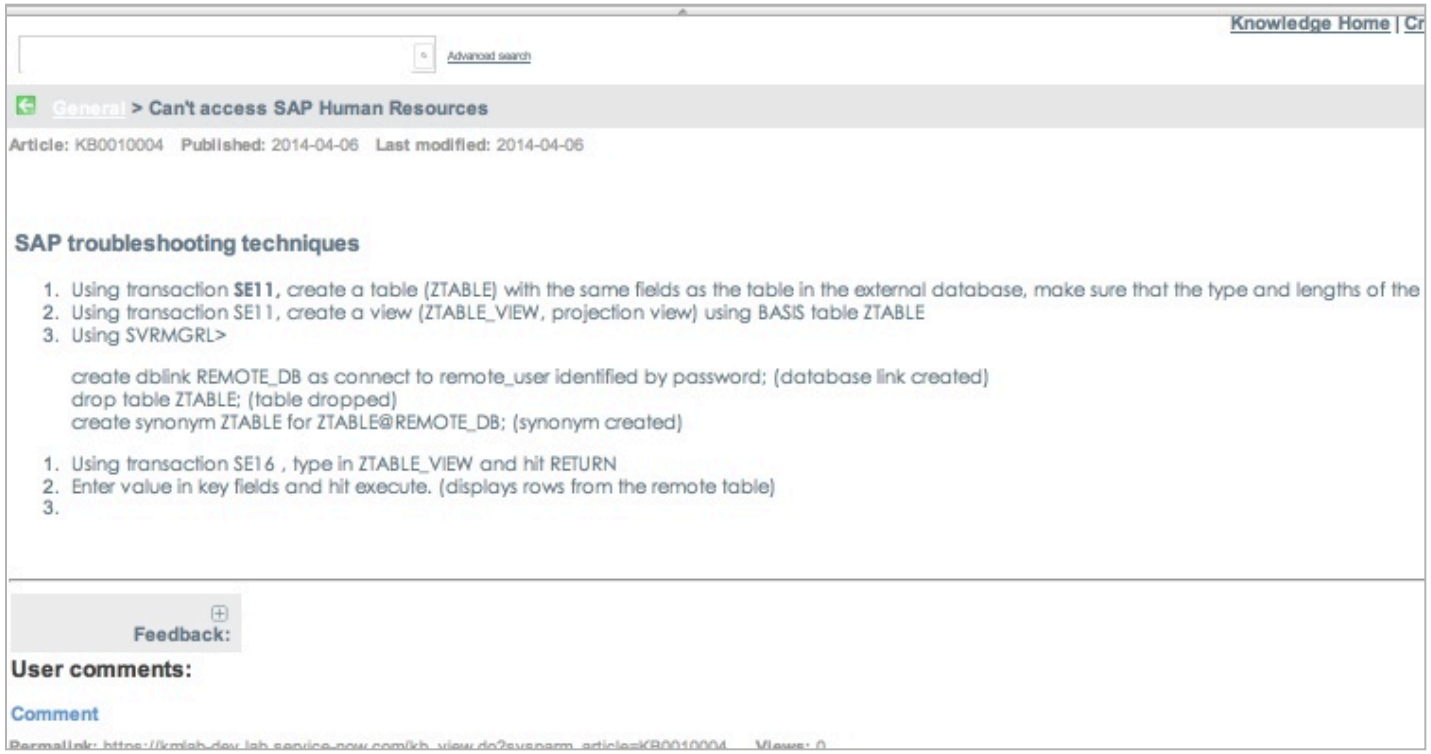


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Lab 2 (5/5)

Test Submission Knowledge Workflow

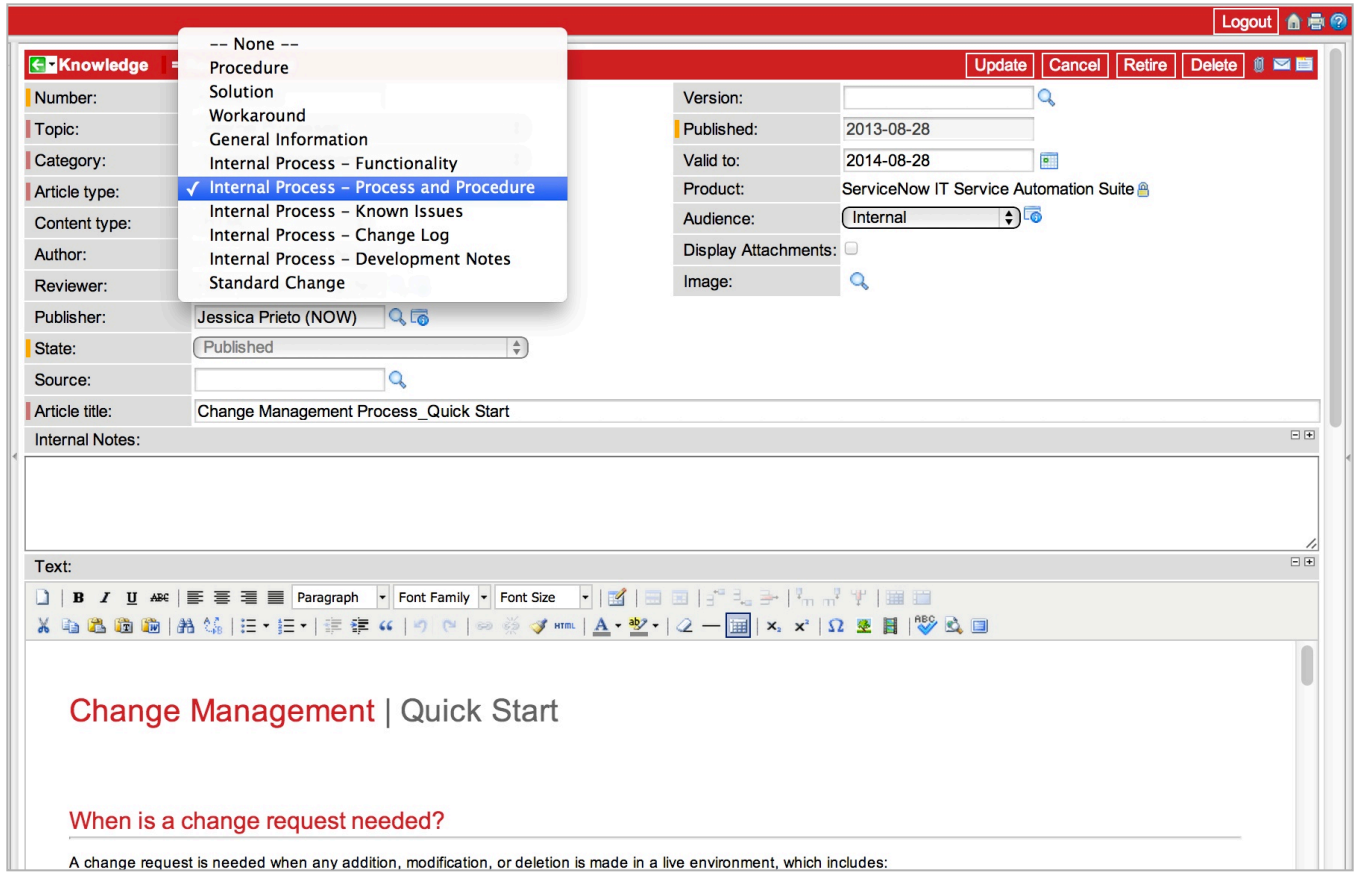
- From article record, click View Article
- ServiceNow notifies the technician that the submission is in progress or has been closed.
- Knowledge management team moves new articles through the standard states: Draft, Review, and Published.



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Taxonomy and Metadata

- **Topics**: highest level of classification. Could be HR, Support, Processes
- **Categories**: secondary level. Could be 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.



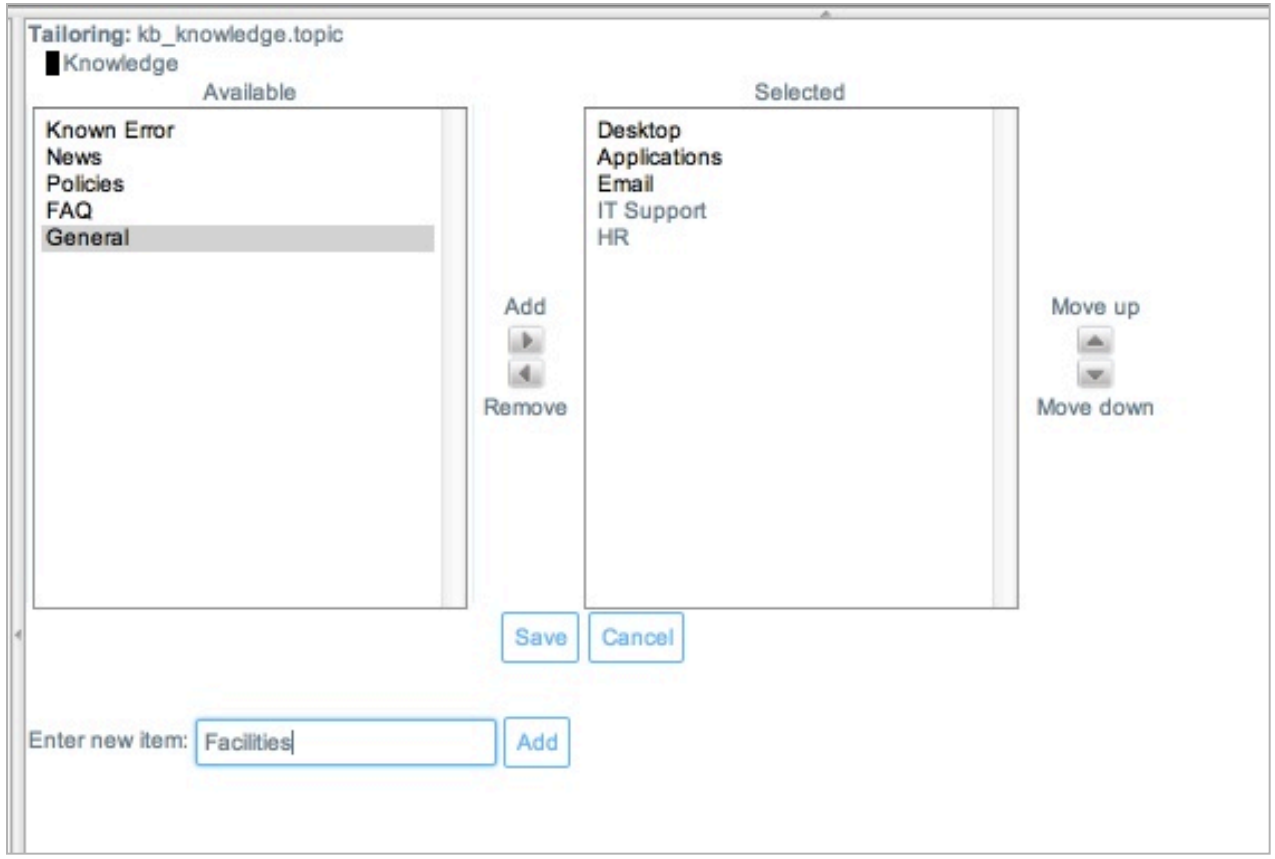
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Lab 3 (1/3)

Create a Simple Taxonomy

Add Topics

- Right click on Topics > Personalize Choices
- Remove:
  - Known Error, News, Policies, FAQ, General
- Add:
  - IT Support
  - HR
  - Facilities



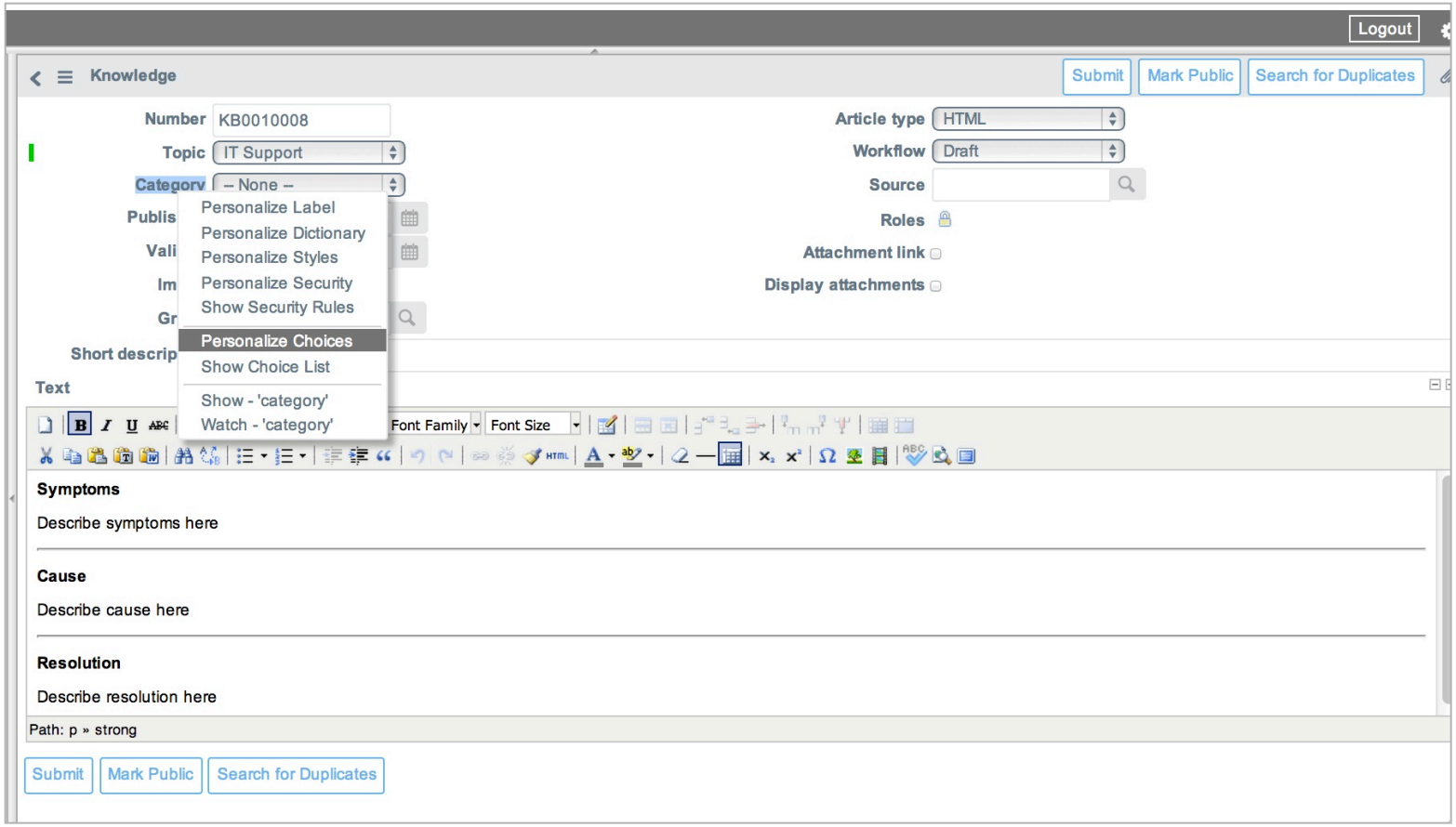
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Lab 3 (2/3)

Create a Simple Taxonomy

Add Categories

- Topic > It Support
- Category > Personalize Choices
- Add:
  - Hardware
  - Software



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Lab 3 (3/3)

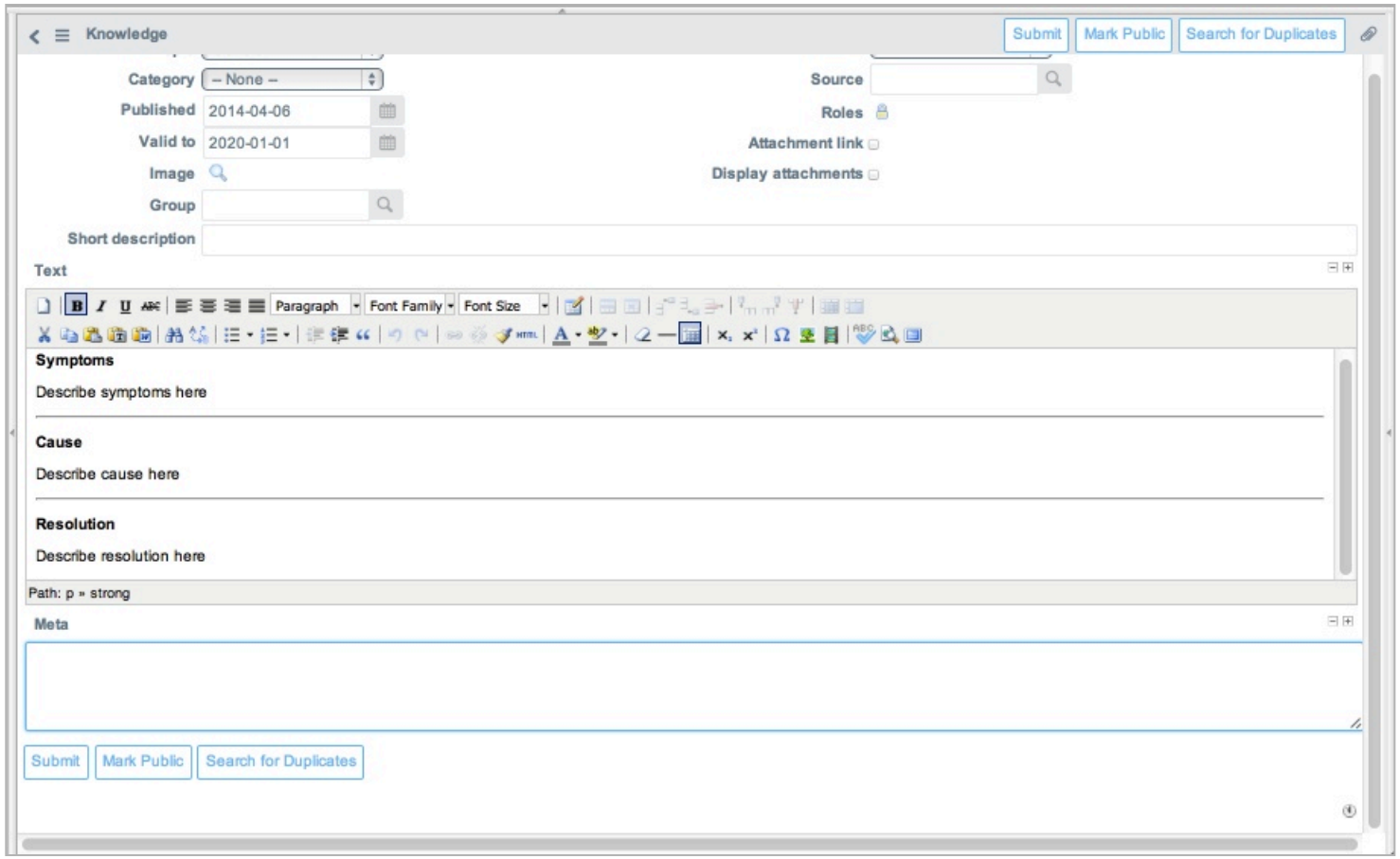
Create a Simple Taxonomy

Add Metadata

- Personalize>Form Layout
- Metadata
- Type **SAP**

Add functionality

- Navigate to Dictionary
- Search meta
- Add drop down list



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Roles

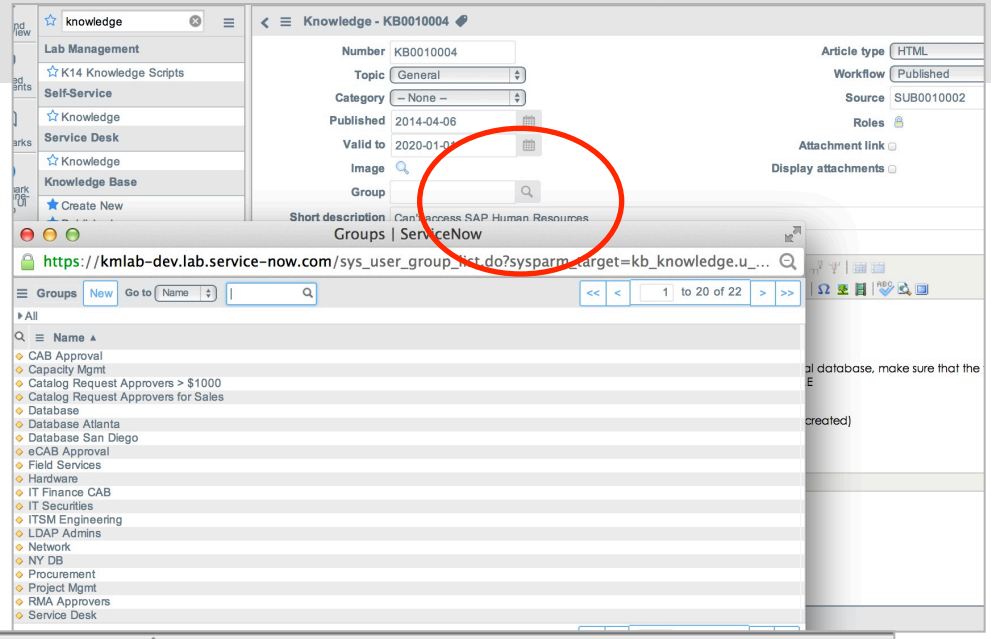
- The knowledge management process at ServiceNow utilizes the following *process roles*:
  - **Knowledge User**: All users who create knowledge content based on their areas of expertise.
  - **Technical Approver**: Members of a first-level approval group. First-level approval groups are specified in 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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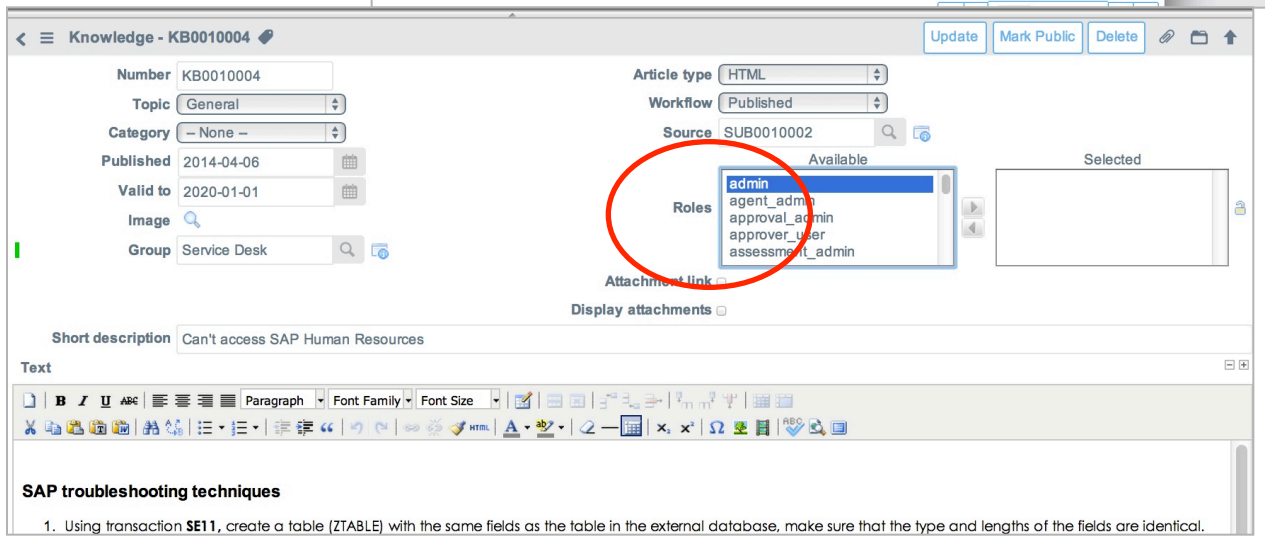
Lab 4

Setting Knowledge Audience and Access

- Open KB article
- Click on magnifying glass next to **Groups** field. Choose Service Desk.



- Click on lock next to **Roles**
- Choose Admin



- Now this article is accessible only to Service Desk admins

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Knowledge Management Workflow

- Graphical Workflow Applied to Knowledge Articles
- Automate
  - Approvals
  - Alerts
    - Approvals
    - Retirement Notifications
  - Review
  - Retirement

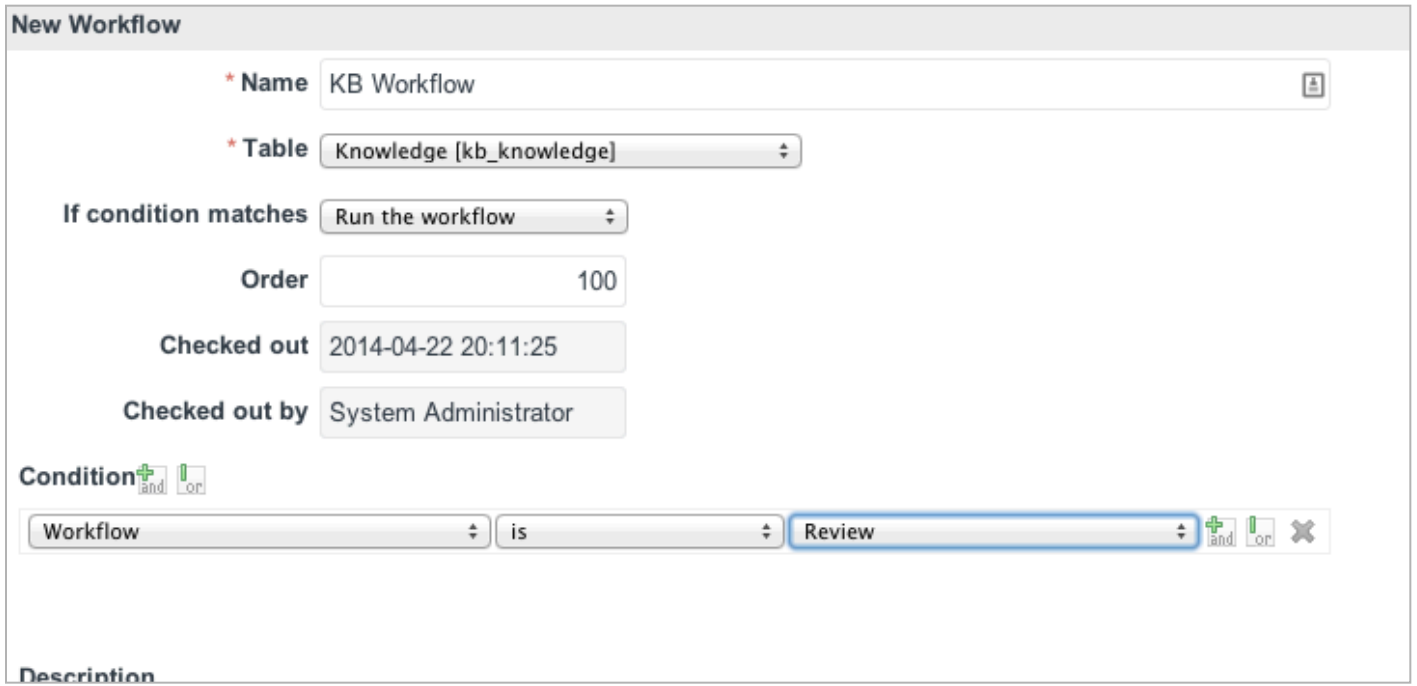
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Lab 5 (1/4)

Create Knowledge Management Workflow

Create a New Workflow

1. Navigate to **Workflow -> Workflow Editor**
2. Click **New**
3. Name: **KB Workflow**
4. Table: **Knowledge [kb_knowledge]**
5. In the Condition field, click the dropdown and select **Workflow.**
6. On the field on the right, click the dropdown and select **Review**
7. Click **Submit**



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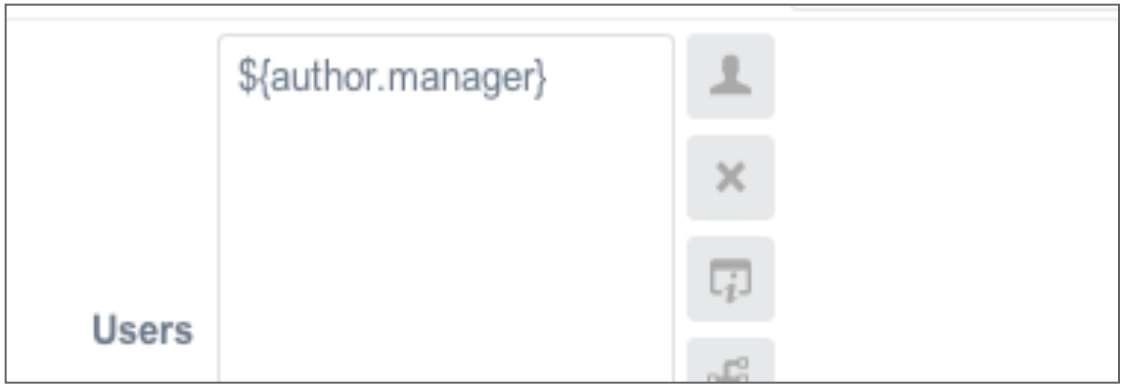
Lab 5 (2/4)

Create Knowledge Management Workflow

Add an Approval

1. In workflow **Approvals** Activity menu, drag **Approval – User** into workflow

   Name the Approval "**Manager Approval"**
2. Click the **lock icon** next to the **Users** field and click on the **Select Fields** icon
3. In tree picker, expand **Author** by clicking on the **plus** sign, then select the **Manager** item in the list
4. Click **Submit**



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Lab 5 (3/4)

Create Knowledge Management Workflow

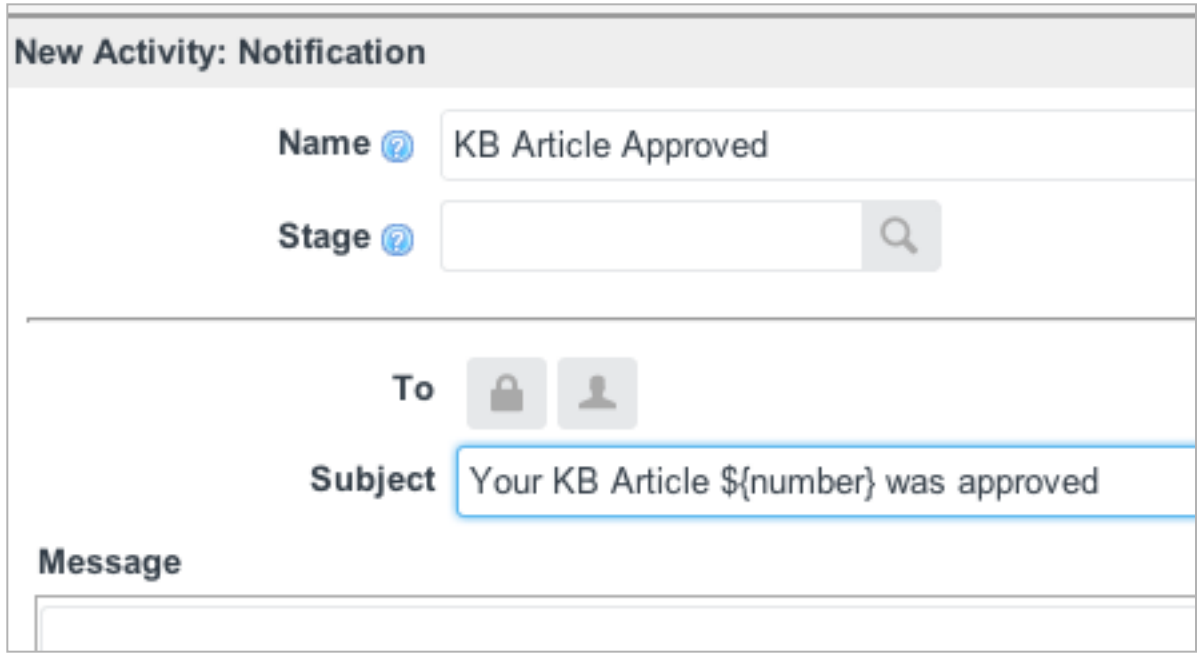
Create Approval Notification (Note: Lab Guide Correction)

1. In the workflow Activities -> Notifications, click and drag a **Notification** onto the workflow path

   Name: **KB Article Approved**

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

2. Click **Submit**



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Lab 5 (4/4)

Create Knowledge Management Workflow

Create re-evaluation activities after 90 days

1. In Activities -> Timers, click and drag a **Timer** activity into the workflow path

   Name: **Wait 90 Days**

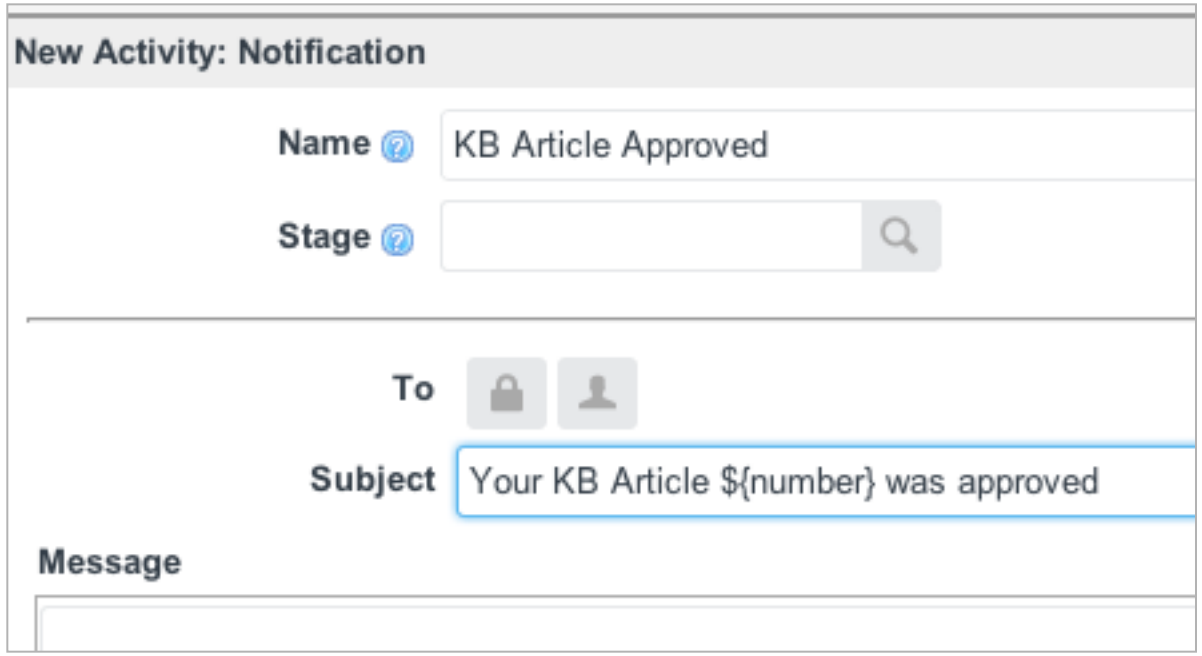
   Duration: Day: **90**

2. Click **Submit**
3. In Activities -> Utilities, 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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End of Lifecycle Actions

- Retire Expired Knowledge Base Articles
- Utilizes “Valid to” Field in Knowledge Article
- Used for Automating the Retirement Process

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Lab 6 (1/2)

End of Lifecycle Actions

Create Retire Expired Knowledge Scheduled Job (Note: Lab Guide Correction)

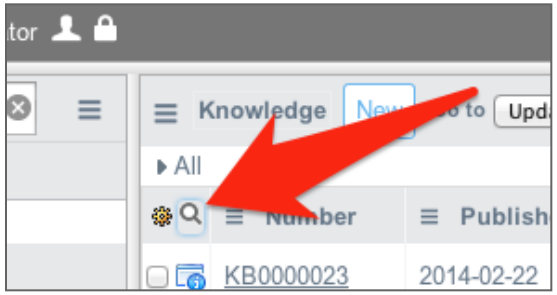
1. Go to **Lab Management > K14 Knowledge Scripts**
2. Click **Retire Expired Knowledge Base Articles**
3. Select all text in the **Script** field and right click to **Copy** it to your clipboard
4. Go to **System Definition > Scheduled Jobs**
5. Click **New**
6. Click the **Automatically run a script of your choosing** link
   Name: **Retire Expired Knowledge Base Articles**
   In the **Script** field, right click and select **Paste**
7. Click **Submit**

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Lab 6 (2/2)

End of Lifecycle Actions

Test the Retire Expired Knowledge Functionality (Note: Lab Guide Correction)



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. Note the value **Workflow** is **Published**
6. Change the **Valid to** date to **2014-04-26** and click **Update**
7. Go to System Definition -> Scheduled Jobs and click on the job you just created named **Retire Expired Knowledge Base Articles**
8. Click the **Execute Now** button
9. Repeat steps 1 – 5 but note that the value changes to **Retired**

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Group-Based Controls

- Publish Knowledge for a Specific Audience
- Different Knowledge for Different Self-Service Users (No Roles Needed)
- Works for Other Organizational Divisions such as Department or Company

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Lab 7 (1/4)

Group Separation

Set up Group field on the Knowledge form

1. Go to **Knowledge Base > Edit**
2. Click on the **magnifying glass** icon in the list
3. In **Short Description** field type ***sap**
4. Click on the **Can't access SAP** article
5. Right-click on the **grey form header**
6. Select Personalize -> Form Layout
7. In bottom right corner, **Create a new field**

   Name: **Group**

   Type: **Reference**

   Table to reference: **Group[sys_user_group]**
8. Click **Add**

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Lab 7 (2/4)

Group Separation

Set up Group field on the Knowledge form

9. Find the group you just added in the **Selected** list
10. Click on the **Group** field in the list
11. Click the **up** arrow on the right of the Selected list to move the **Group** field below the **image** field
12. Click **Save** button below the two lists
13. In the newly added **Group** field, type **Software** and select the **Group** that appears
14. Click **Update** on the Knowledge form

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Lab 7 (3/4)

Group Separation

Add the Group Business Rule (Note: Lab Guide Correction)

1. Go to **Lab Management -> K14 Knowledge Scripts**
2. Click on the script named **Group Separation in Knowledge Base**
3. Select all of the text in the **Script** field, right click on it and select **Copy**
4. Navigate to **System Definition -> Business Rules**
5. Click the **New** button at the top of the list
6. Fill out the following information

   Name: **Group Separation in Knowledge Base**

   Advanced: **(Check the box)**

   Table: **Knowledge[kb_knowledge]**

   When: **Before**

   Query: **(Check the box)**

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Lab 7 (4/4)

Group Separation

Add the Group Business Rule

7. In the Actions section, in the **Script** field right-click and **Paste** the script
8. Click Submit

Test the Business Rule

1. Impersonate David Loo
2. Go to Self-Service -> Knowledge
3. In the search bar, search for the term **SAP** and press **Enter**
4. Notice the presence of the **Can't access SAP** article
5. Impersonate Bow Ruggeri
6. Repeat steps 2 – 4 and notice the article is no longer there

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Prioritizing Knowledge Articles

- Knowledge Management is an Investment
- Maximize the ROI in Building Out Knowledge Management
- What 20% of Articles Will Address 80% of the Issues?

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Lab 8 (1/4)

80/20

Create Pareto Chart of Incidents by Configuration Item

1. Navigate to **Reports -> View/Run**
2. Click **New**

   Name: **Incidents by Configuration Item**

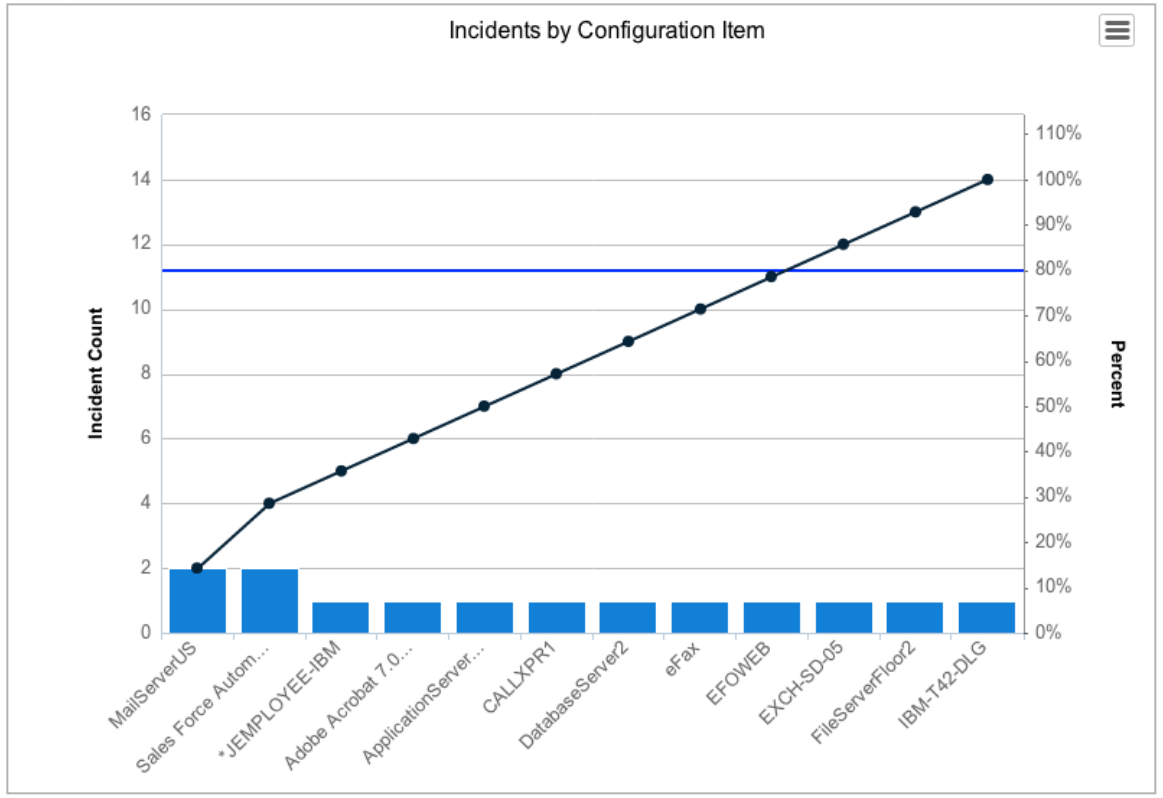
   Type: **Pareto Chart**

   Table: **Incident**

   Group by: **Configuration Item**

   Other Threshold: **Remove Other**

   Condition: **(Configuration Item) (is not empty)**
3. Click the **Save** button



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Lab 8 (2/4)

80/20

Create Pareto Chart of Incidents by Assignment Group

1. Navigate to **Reports -> View/Run**
2. Click **New**

   Name: **Incidents by Assignment Group(Lab Correction)**

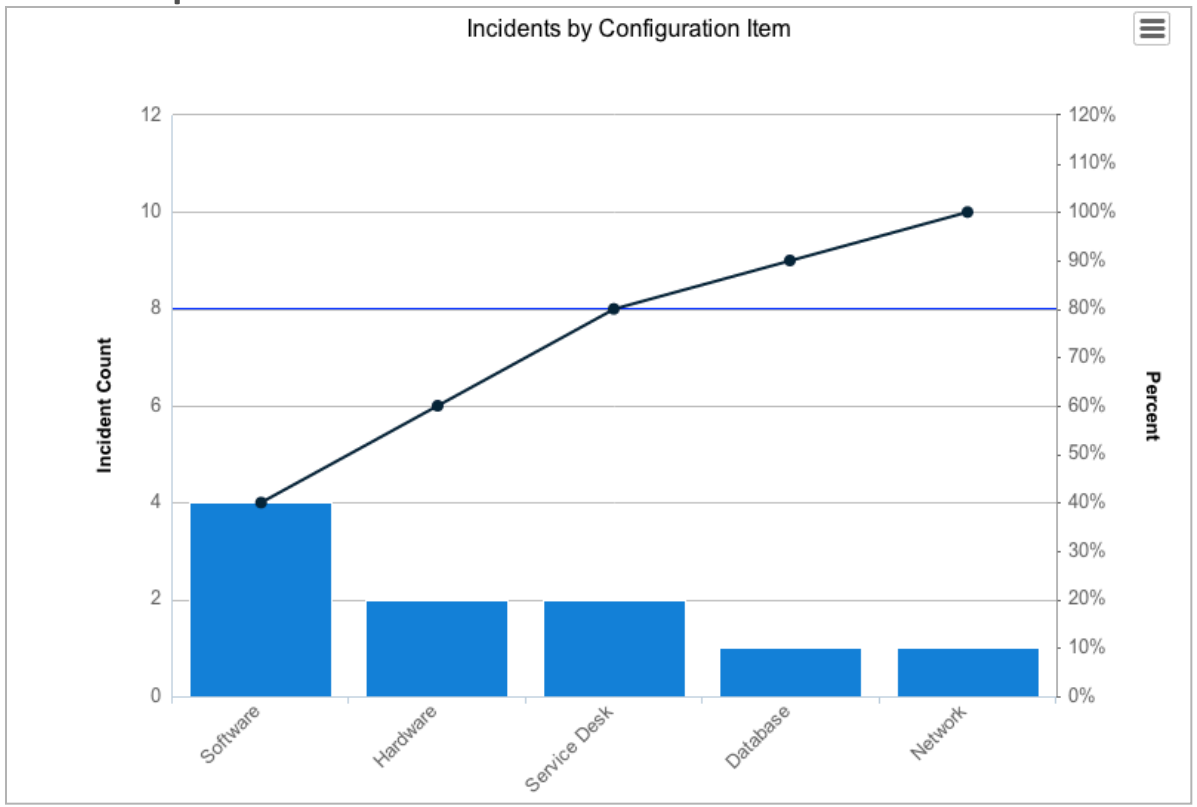
   Type: **Pareto Chart**

   Table: **Incident**

   Group by: **Assignment Group**

   Other Threshold: **Remove Other**

   Condition: **(Assignment Group) (is not empty)**
3. Click the **Save** button



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Lab 8 (3/4)

80/20

Create Pareto Chart of Problem by Configuration Item

1. Navigate to **Reports -> View/Run**
2. Click **New**

   Name: **Problems by Configuration Item(Lab Correction)**

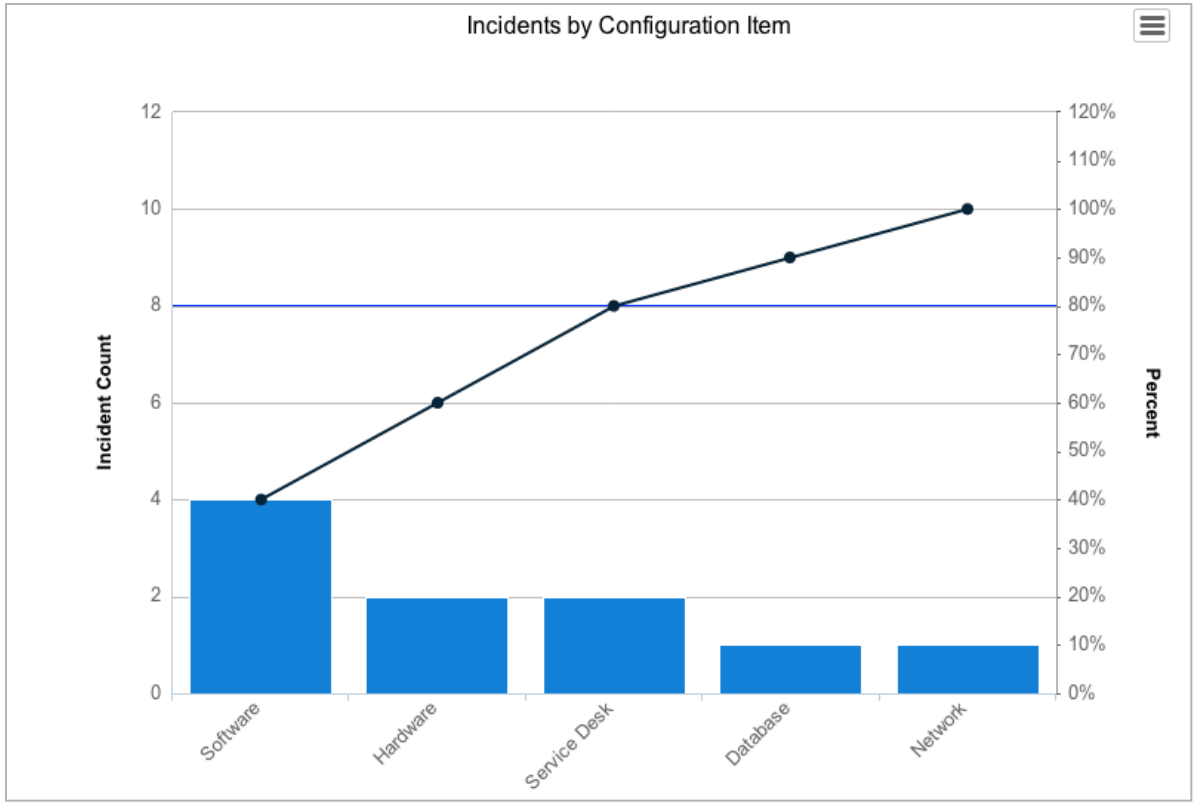
   Type: **Pareto Chart**

   Table: **Problem**

   Group by: **Configuration Item**

   Other Threshold: **Remove Other**

   Condition: **(Configuration Item) (is not empty)**
3. Click the **Save** button



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Lab 8 (4/4)

80/20

Create Pareto Chart of Problem by Configuration Item

1. Navigate to **Reports -> View/Run**
2. Click **New**

   Name: **Problems by Configuration Item(Lab Correction)**

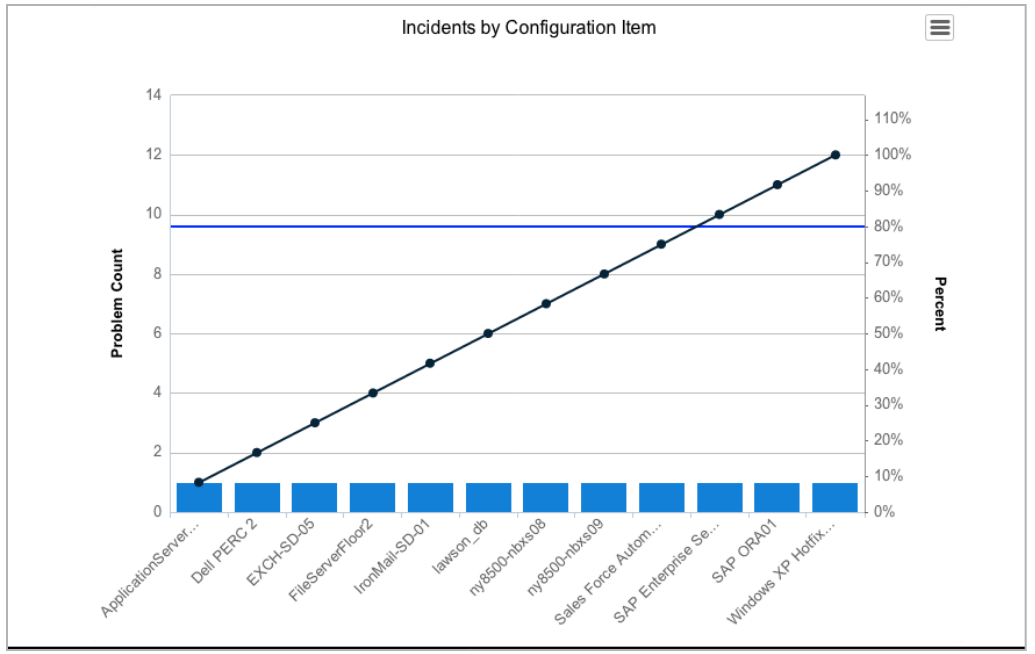
   Type: **Pareto Chart**

   Table: **Problem**

   Group by: **Configuration Item**

   Other Threshold: **Remove Other**

   Condition: **(Configuration Item) (is not empty)**
3. Click the **Save** button



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Lab 9 (1/2)

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. In the Script field, **select all text**, and right-click to **Copy** it to your clipboard
4. Navigate to **Incidents -> Open**
5. Right-click on the **column headers** at the top of the list and select Personalize -> Client Scripts

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Lab 9 (2/2)

Proactively Display Knowledge

6. Click **New**

   Name: **Display Knowledge on Short Description**

   Type: **OnLoad**

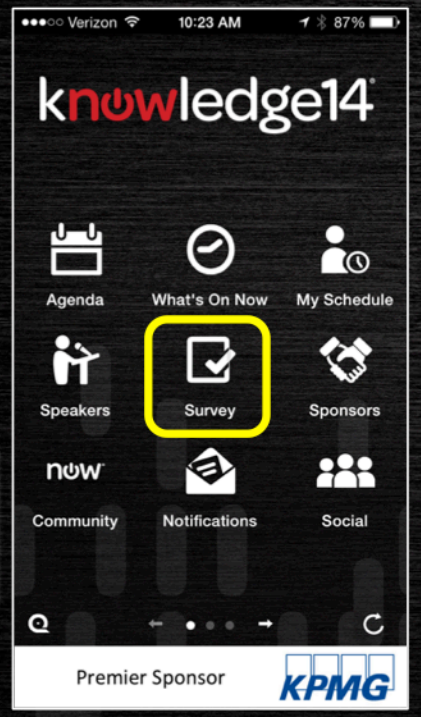
   Script: Select all, then right-click and select **Paste**

   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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Tell us what you think!



Click on the survey link in your Knowledge14 mobile app. Help us make Knowledge 15 even more valuable!

Thank You

Roy Scheer

Solution Architect

ServiceNow

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Wally Marx

Associate Solution Consultant

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