knowledge15®
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Lab Guide

Knowledge Management:

Knowledge is Power – Share it!

Britt Champeau & Paul Palse

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

This

Page

Intentionally

Left

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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
New Menus and Modules

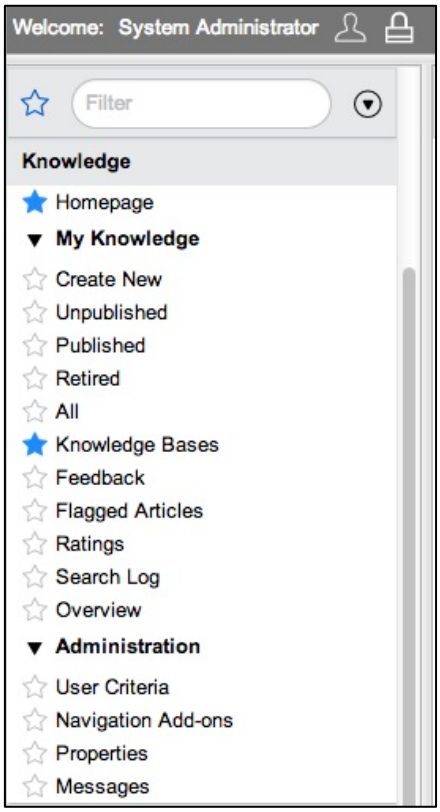
Log on to Your Training Instance

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

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The Knowledge Homepage

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

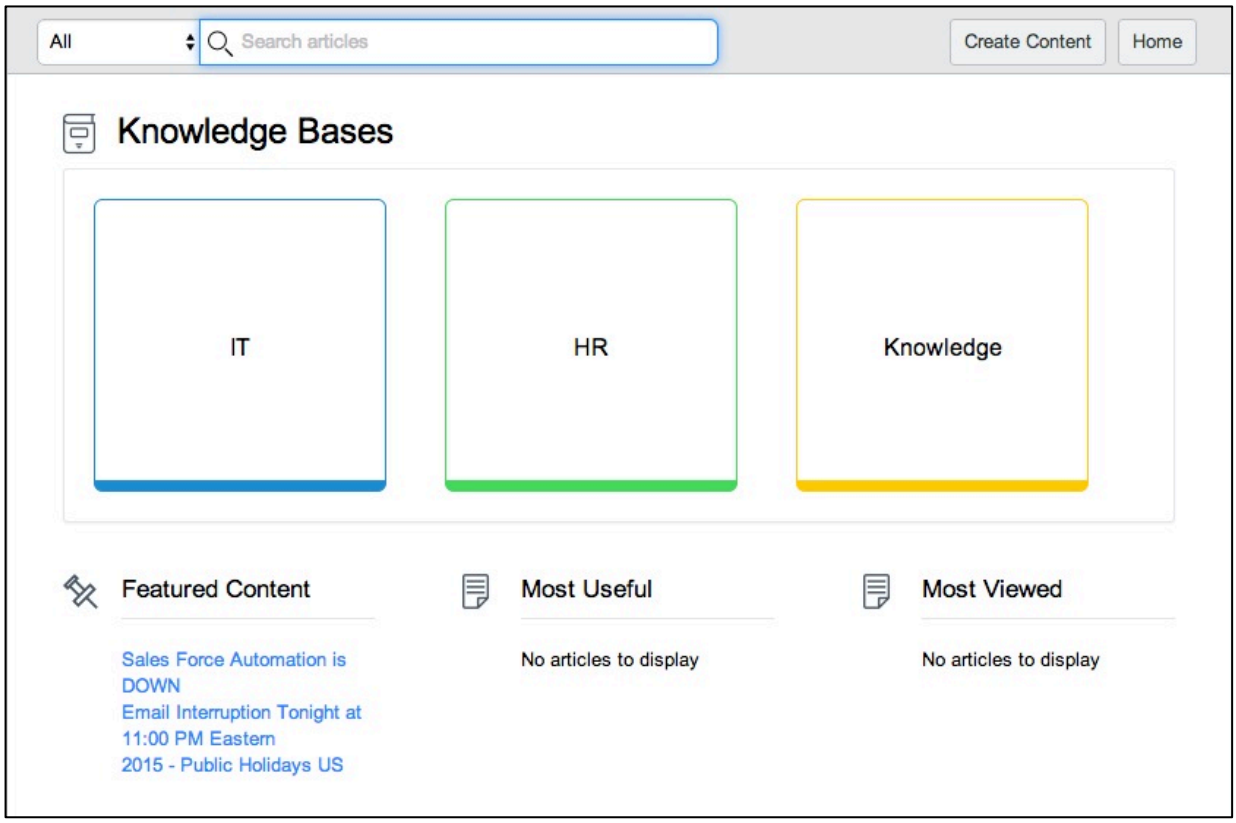


2. Notice there are three Knowledge Bases available out-of-the-box. The Knowledge Base titled **Knowledge** stores legacy (v2) content.

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Lab Success Verification

1. Your screen should look like the example.



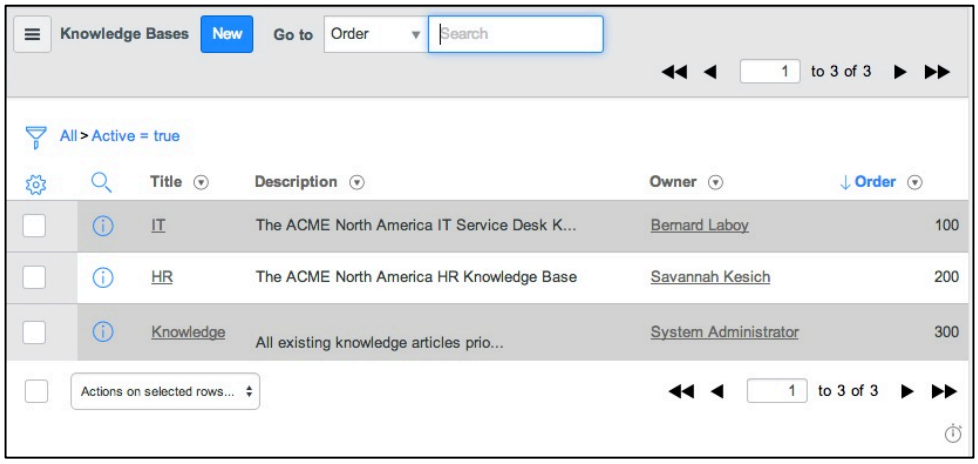
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Knowledge Bases Module

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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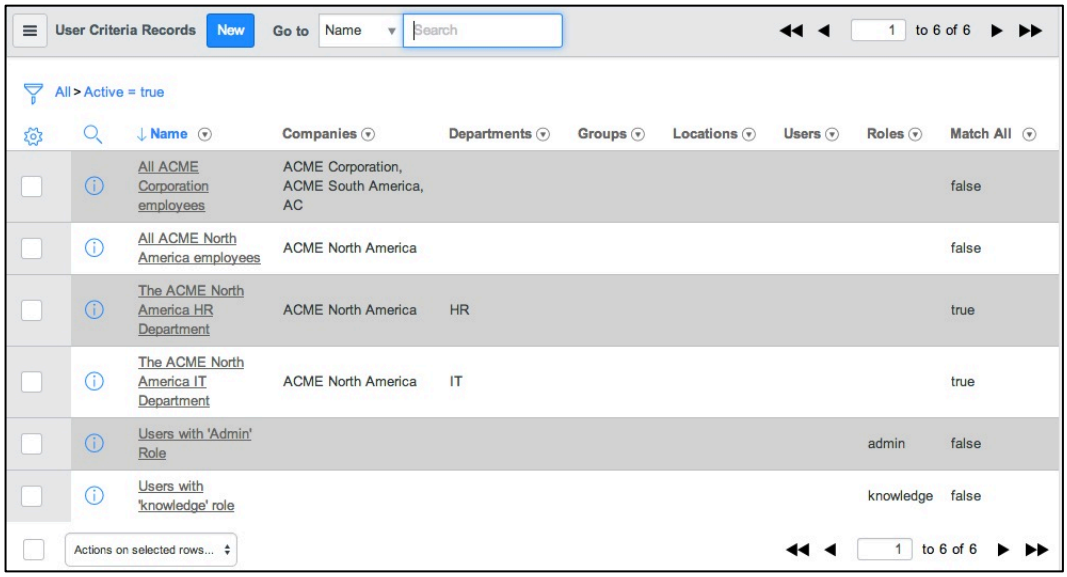
User Criteria Module

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

2. Notice there are six out-of-the-box User Criteria available.

Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

This lab explains how to configure the functionality of the following Knowledge Base features:

- **Legacy Portal Page**—to prepare for possible required customizations to **kb_home**
- **Article View Properties**–to modify default article view properties
- **Knowledge Search Properties and Other Properties**–to modify default knowledge search and other properties

Lab 2 Configure Portal Properties

2.1 Configure the Legacy Portal Page

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

2. Enter the following information in the Knowledge Portal Properties section of the Knowledge Management Properties form:

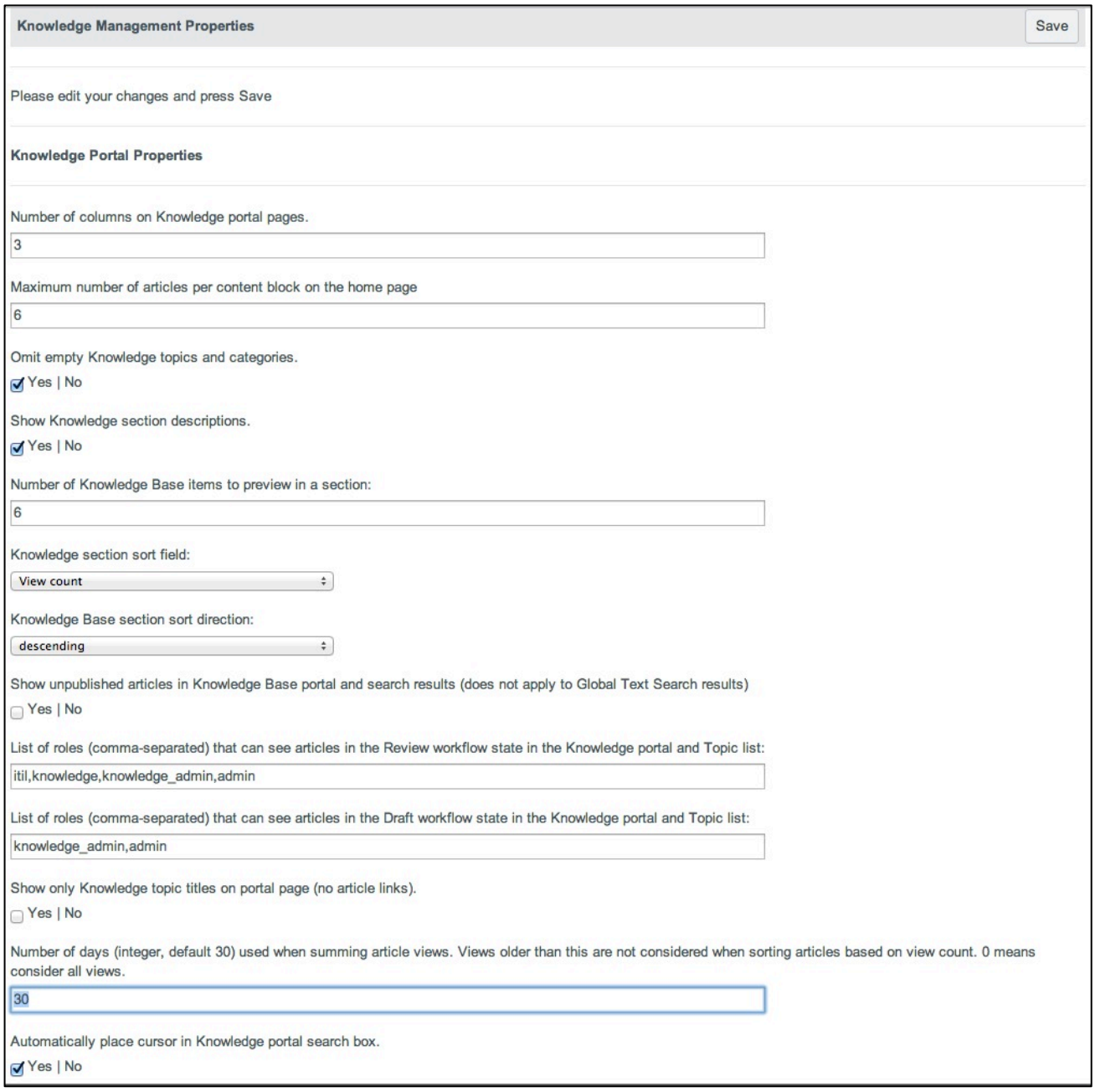
   - Number of columns on Knowledge portal pages: **3**
   - Maximum number of articles per content block on the home page: **6**
   - Number of Knowledge Base items to preview in a section: **6**
   - Knowledge section sort field: **View Count**
   - Number of days (integer, default 30) used when summing article views. Views older than this are not considered when sorting articles based on view count. 0 means consider all views: **30**

3. Click **Save**.

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Lab Success Verification

1. Your screen should look like the example.



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2.2 Configure Article View Properties

1. While still on the previous page, scroll to **Article View Properties**.
2. Enter the following information in the **Article View Properties** section of the **Knowledge Management Properties** form:
   - List of roles (comma-separated) that can see user comments on an article: **itil**
   - Use Live Feed for Knowledge feedback: **No (unchecked)**.
3. Click **Save**.

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Lab Success Verification

1. Your screen should look like the example.



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2.3 Configure Knowledge Search Properties and Other Properties

1. While still on the previous page, scroll to **Knowledge Search Properties**.

2. Enter the following information in the **Knowledge Search Properties** section of the **Knowledge Management Properties** form:

   - Show author in knowledge search results: **No (unchecked)**
   - Show publish date in knowledge search results: **Yes (checked)**
   - Show relevancy in knowledge search results: **Yes (checked)**

3. Enter the following information in the **Other Knowledge Properties** section of the **Knowledge Management Properties** form:

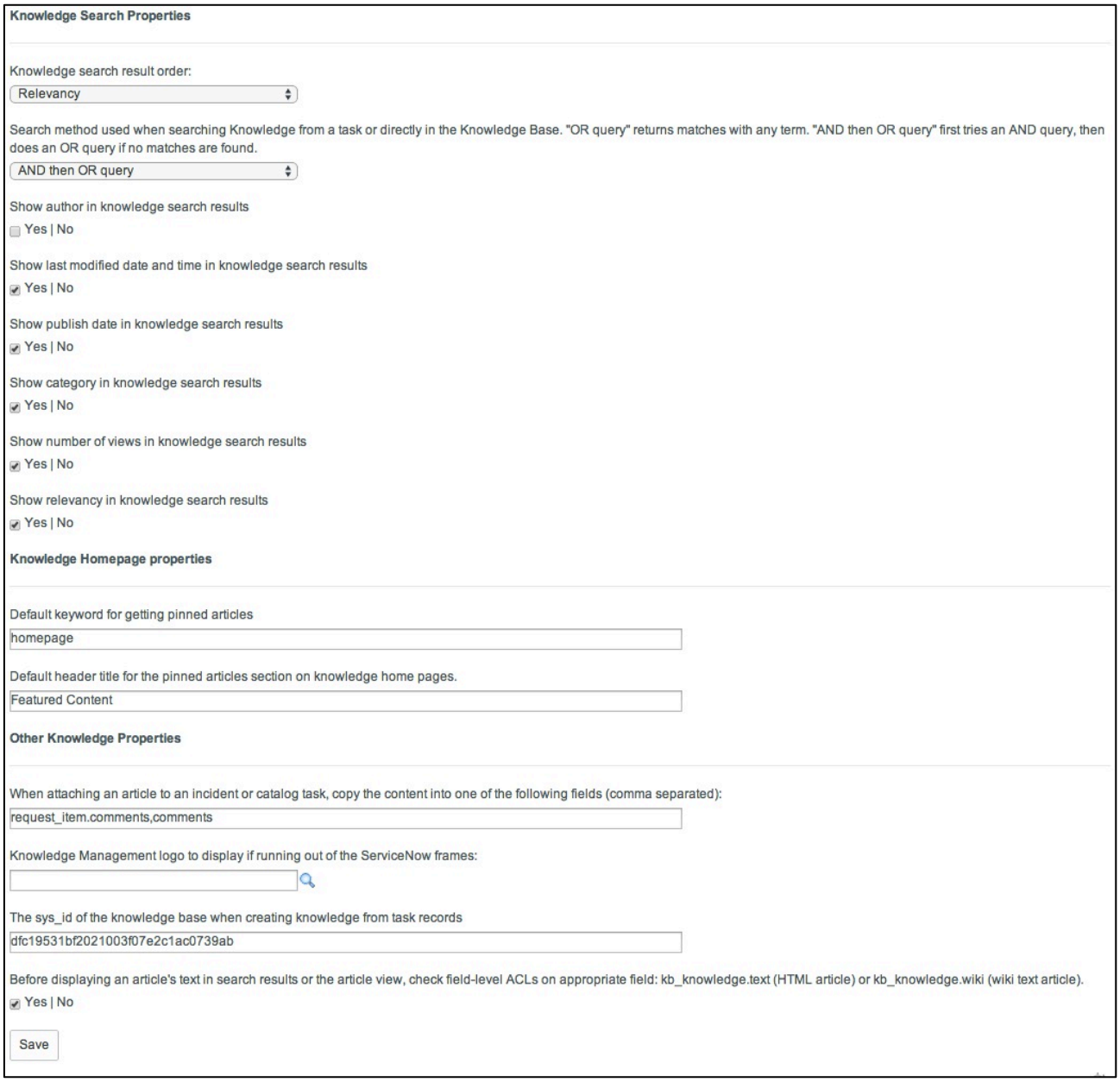
   - Before displaying an article's text search results or the article view, check field-level Access Control Lists (ACLs) on appropriate field: kb_knowledge.text (HTML article) or kb_knowledge.wiki (wiki text article): **Yes (checked)**

4. Click **Save.**

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Lab Success Verification

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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

Lab 3.0 Create User Criteria

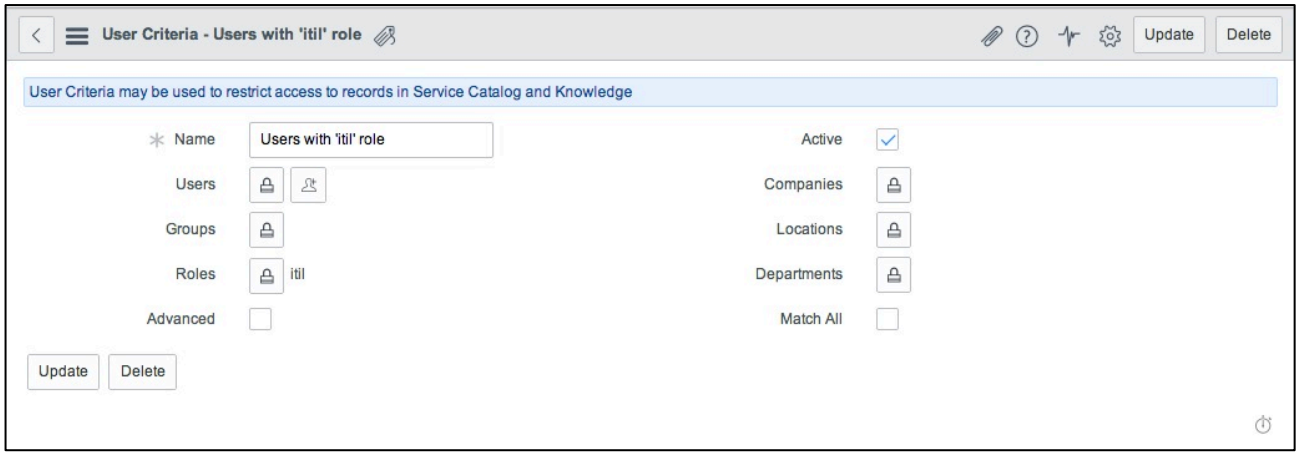
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3.1 Create New Role-Based User Criteria

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.**

Lab Success Verification

1. Your screen should look like the example.



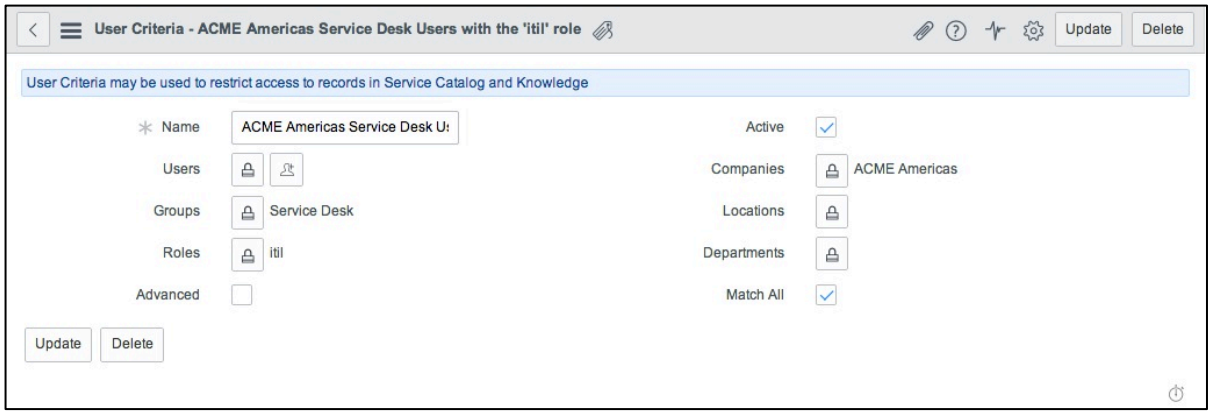
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3.2 Create New Multi-Attribute User Criteria

1. Click the in-frame **Back** button to return to the **User Criteria** table**.**
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**
   - Ensure Active box is **checked**
   - Ensure Match All box is **checked**
4. Right-click in the header, and click **Save.**

Lab Success Verification

1. Your screen should look like the example.



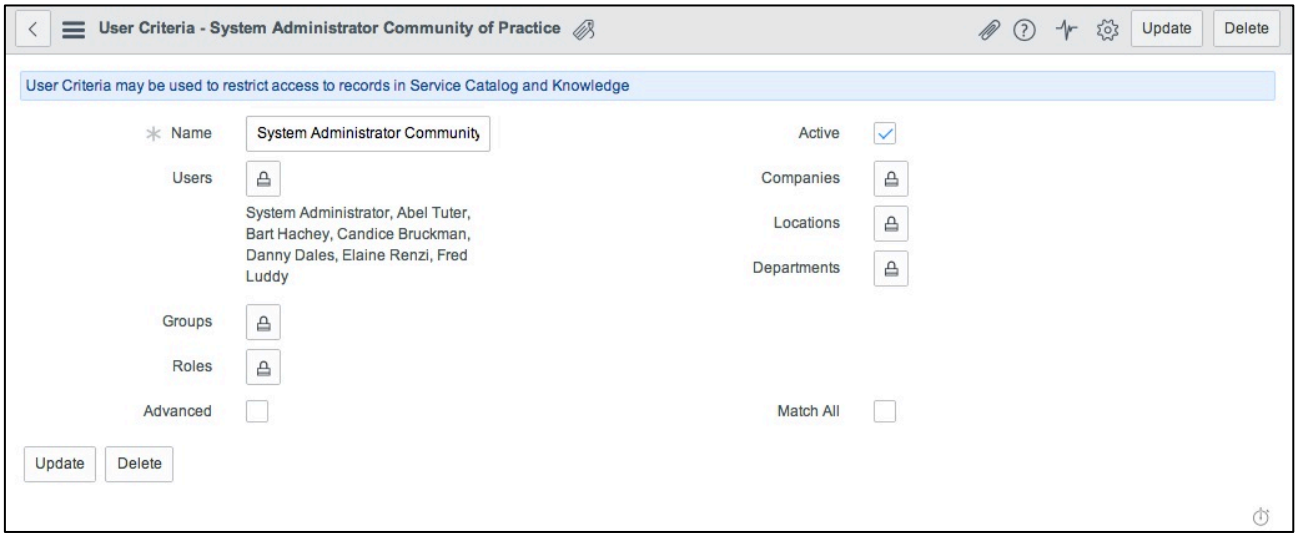
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3.3 Create User Criteria for Individual Users

1. Click the in-frame **Back** button to return to the **User Criteria** table.
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.**

Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 4.0 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 the equally limited Viewing and Editing**— to create a Knowledge Base with highly restricted limitations for **Can Read** and **Can Contribute**

4.1 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**
4. Right-click in the header, and click **Save**.
5. Open the **Can Contribute** tab.
6. Click **Edit**.

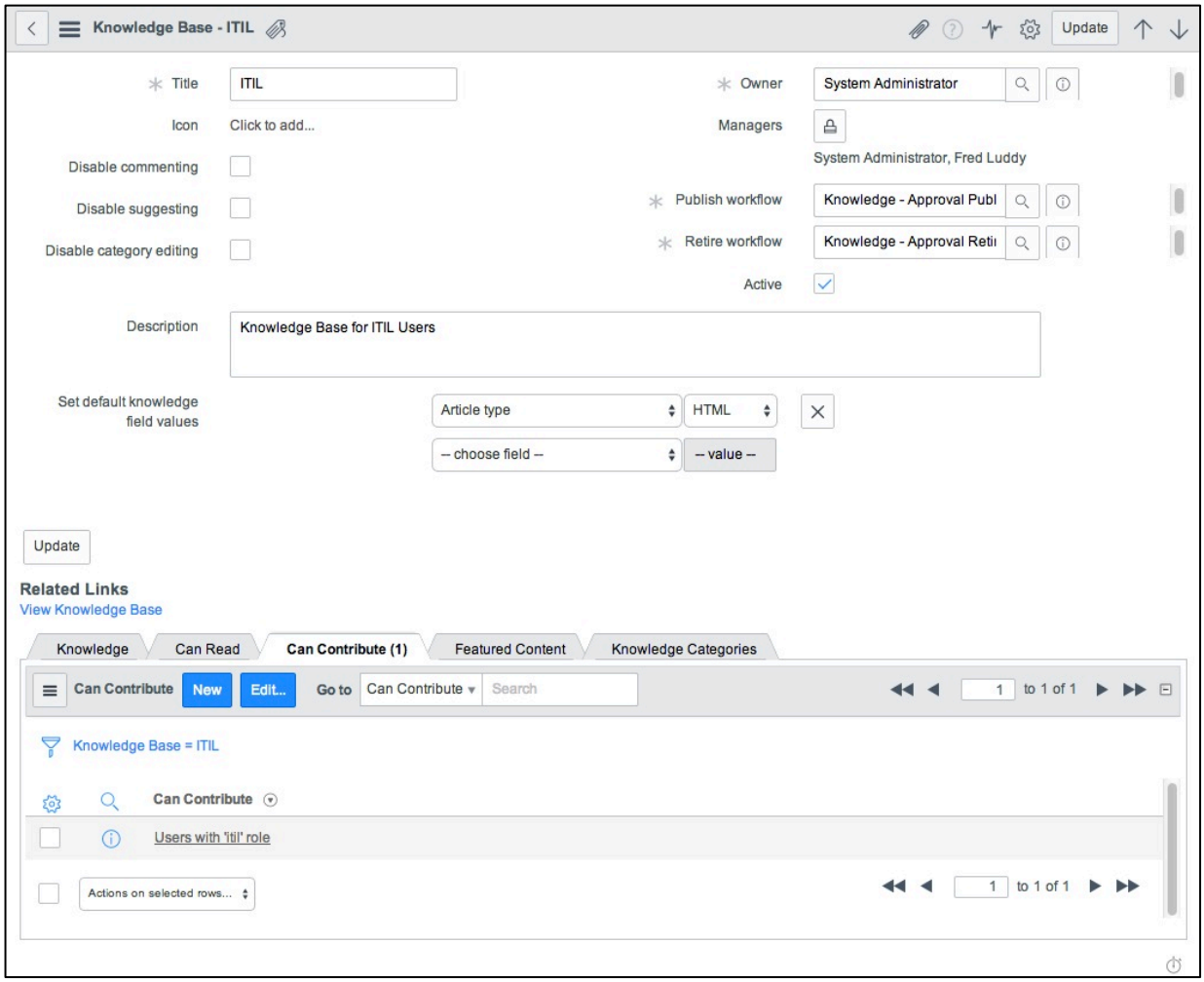
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7. Select **Users with 'itil' role** from the **Collection** on the left, and add it to the **Can Contribute** list on the right.

8. Click **Save.**

Lab Success Verification

1. Your screen should look like the example.



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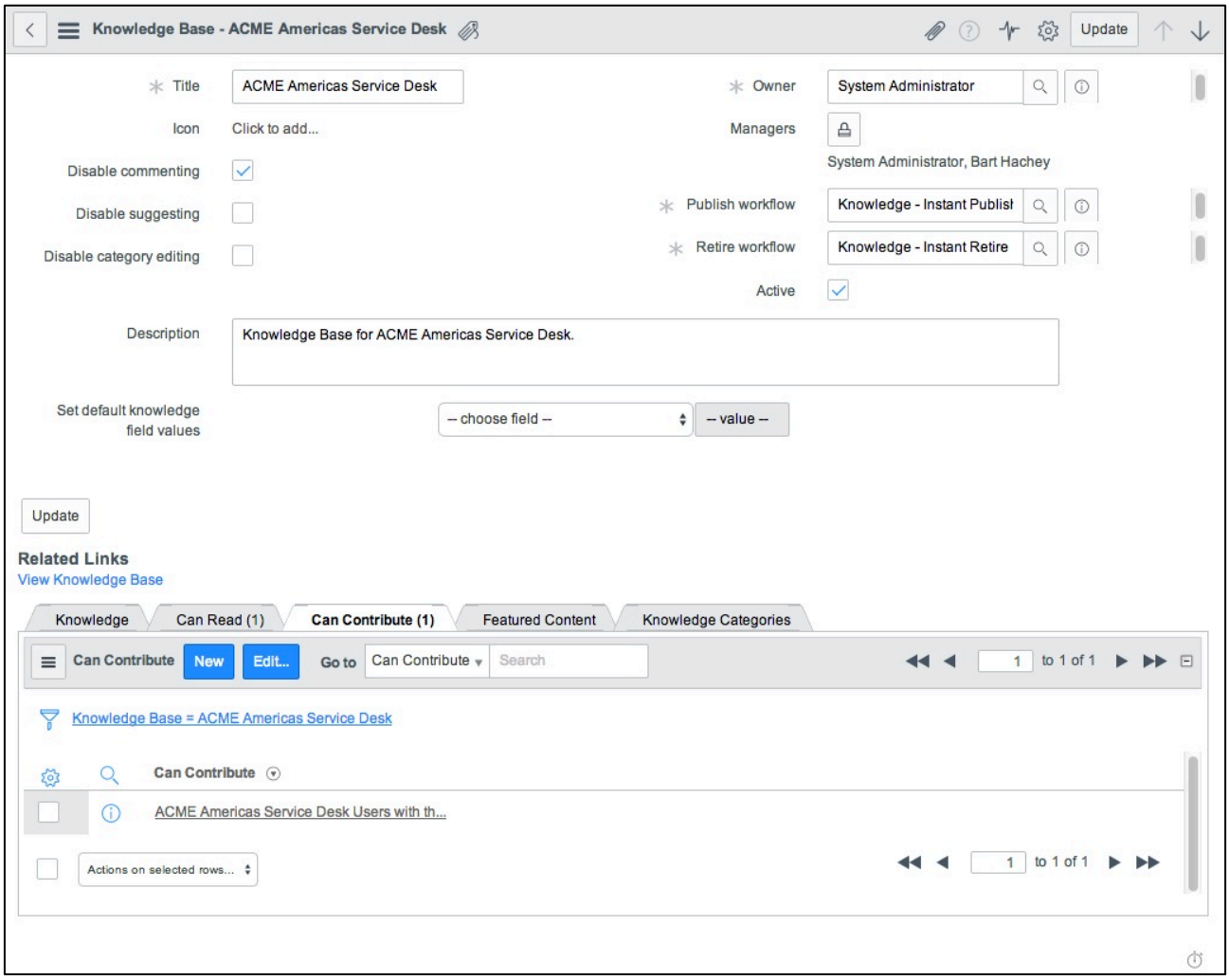
4.2 Create a Knowledge Base with Different Viewing and Editing

1. Click the in-frame **Back** button to return to the **Knowledge Bases** table**.**
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**
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 the Collection on the left, and add to the **Can Contribute** list on the right.
12. Click **Save.**

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Lab Success Verification

1. Your screen should look like the example.



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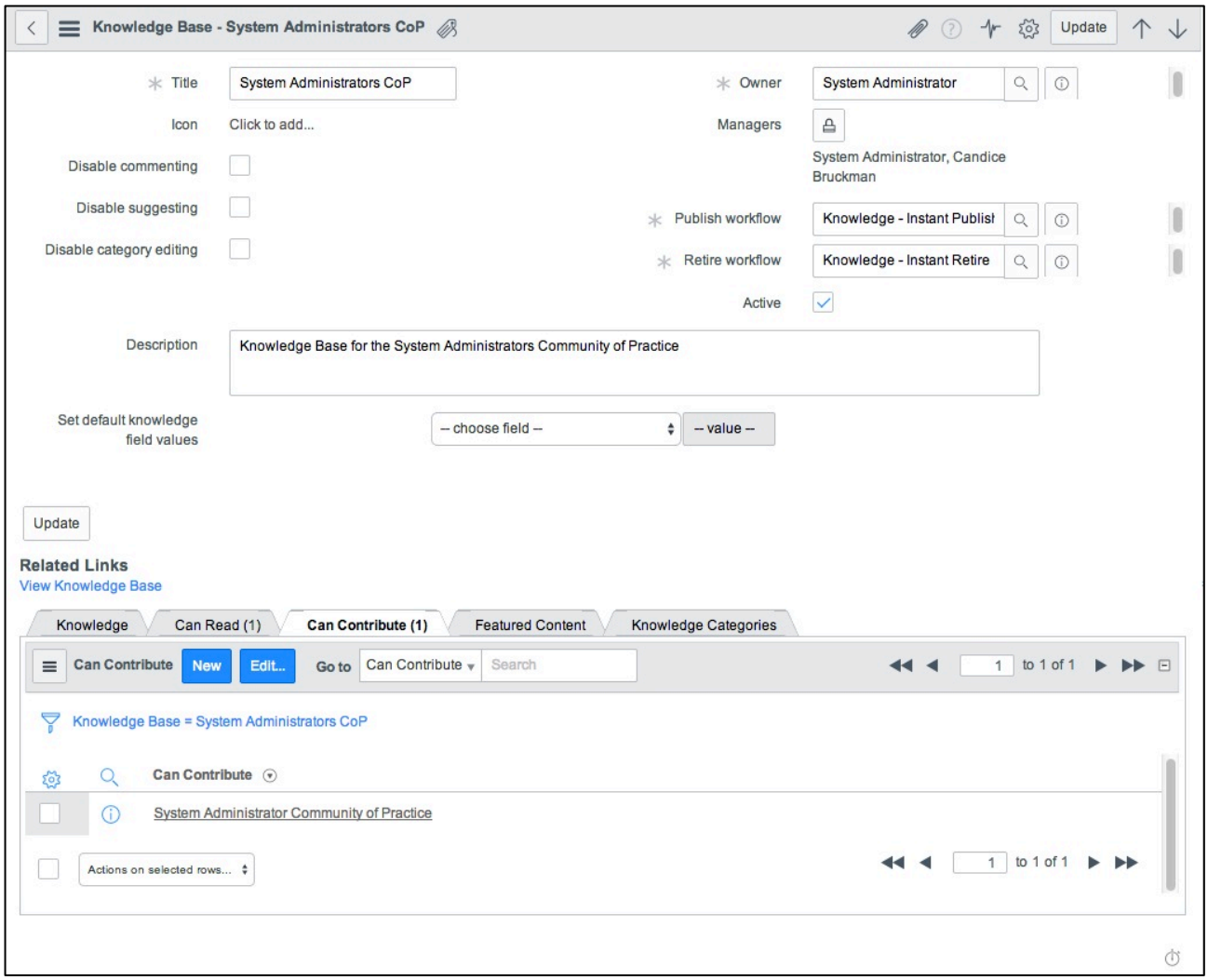
4.3 Create a Knowledge Base with Equally Limited Viewing and Editing

1. Click the in-frame **Back** button to return to the **Knowledge Bases table**.
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**
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 the **Collection** on the left, and add to the **Can Contribute** list on the right.
12. Click **Save**.

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Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

Lab 5.0 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.

5.1 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**

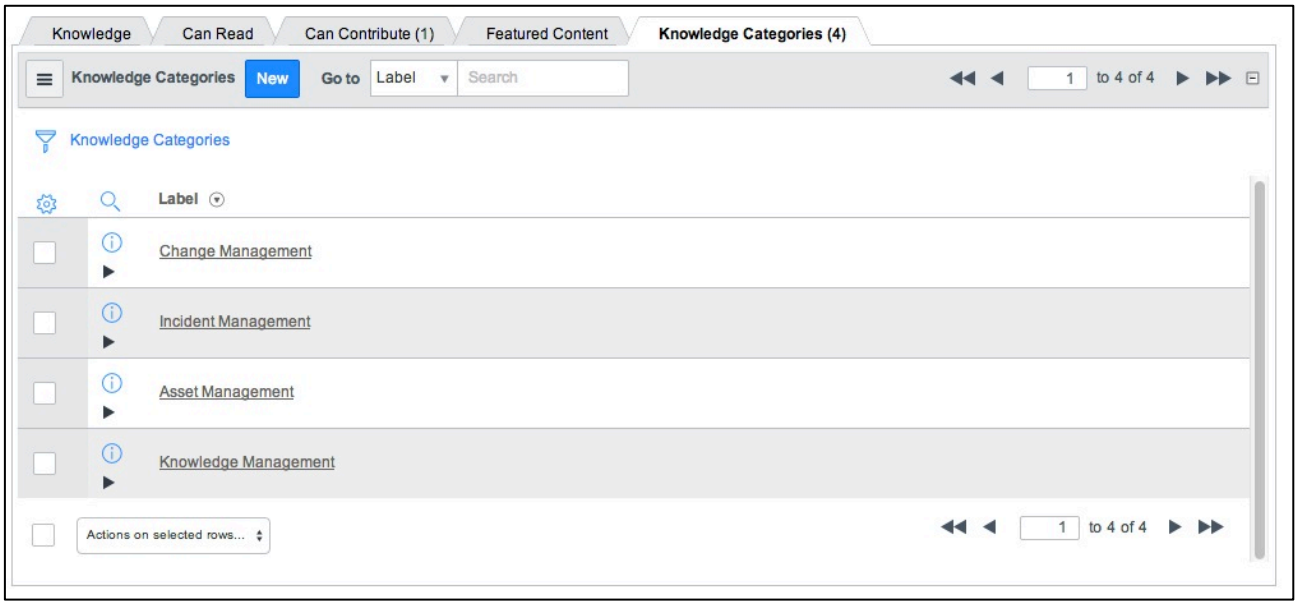
14. Open **ITIL**.

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

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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 6.0 Migrate Content

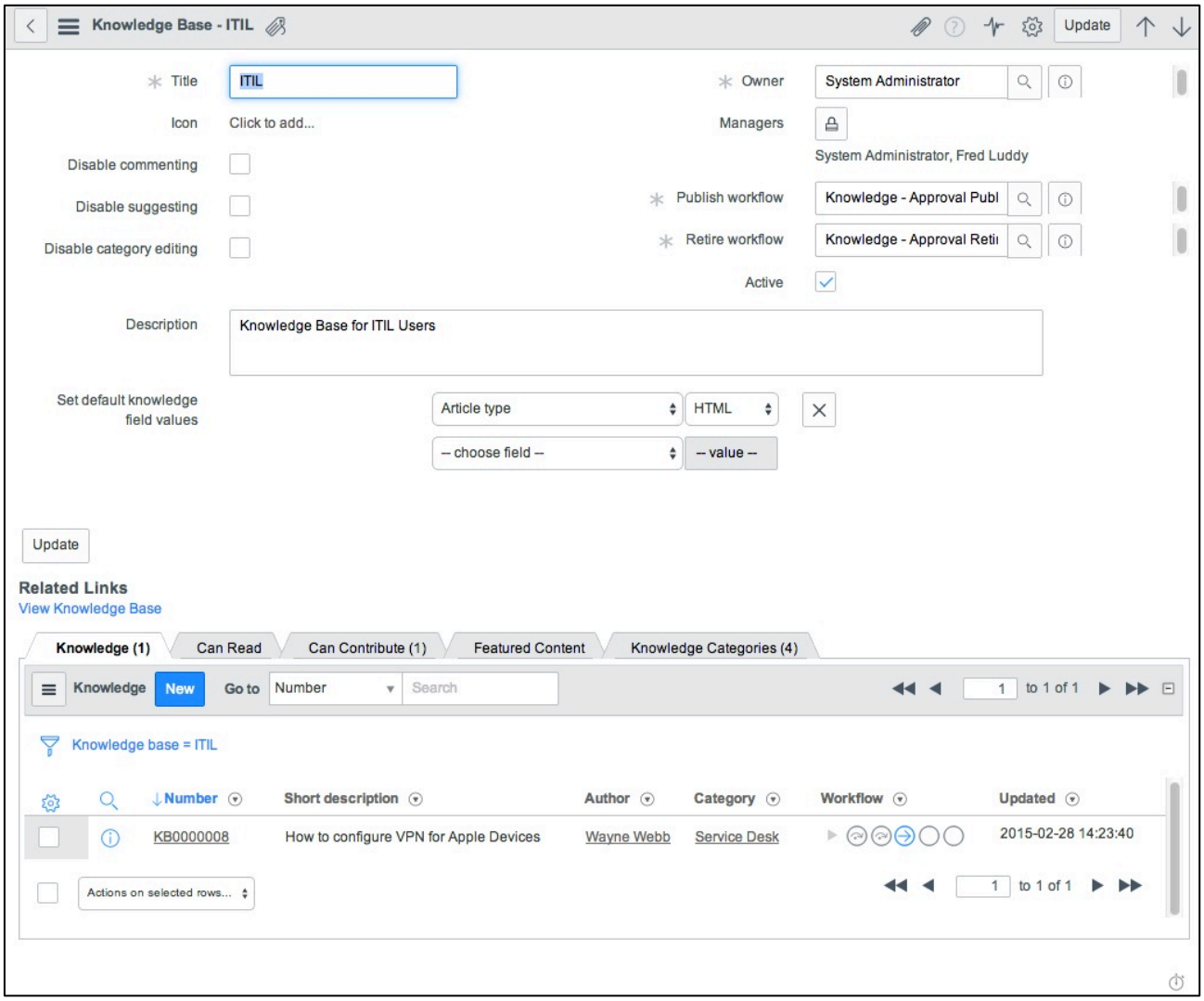
6.1 Migrate Individual Knowledge Articles

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** and click **OK** in the **Apply Default Values** modal window.
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.

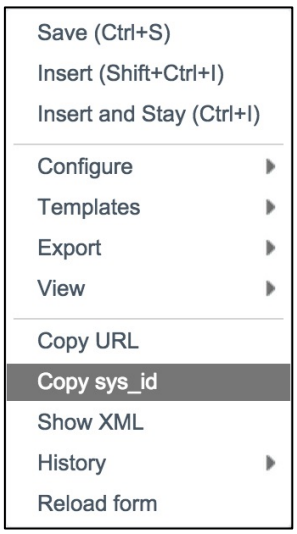


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6.2 Migrate Content with a Script

1. Navigate to **Knowledge >Administration > Knowledge Bases**.
2. Open **ITIL**.
3. Right click the **header bar** and choose **Copy sys_id.**



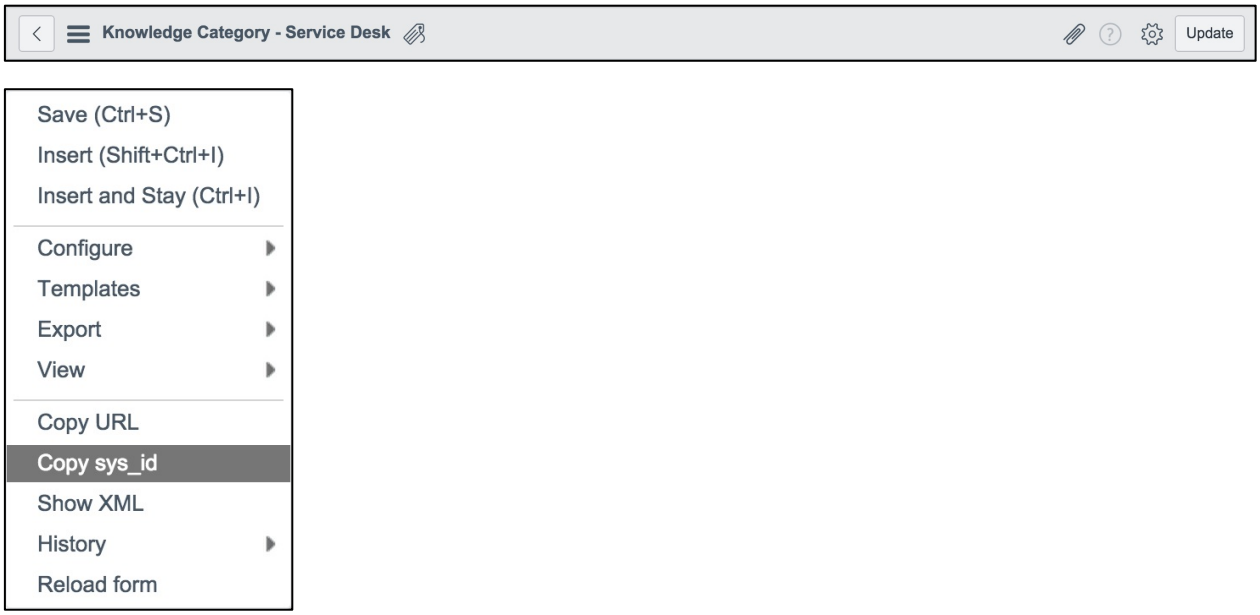


4. Copy and paste the **sys_id** into a notepad**.**
5. Open **KB0000008 – How to configure VPN for Apple Devices**.
6. Click the **Information** icon of the **Category** field.



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

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10. 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);
    }
}
```

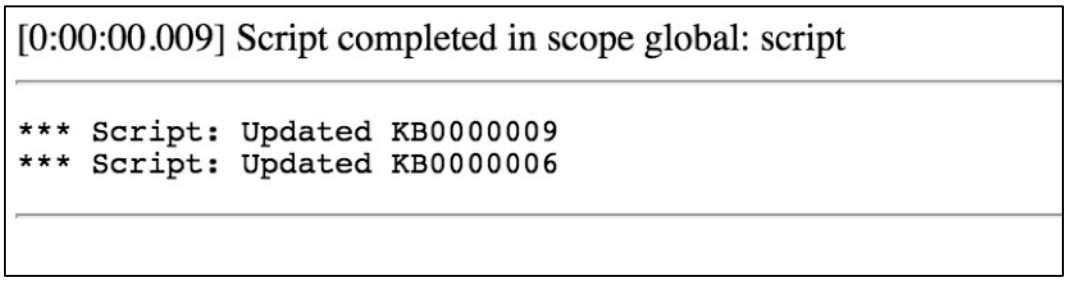
11. Replace **'a7e8a78bff0221009b20ffffffffff17'** with the sys_id copied in step 4.

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

13. Click **Run Script**.

Lab Success Verification

1. Your screen should look like the example.



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Lab Goal

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

Lab 7.0 Create New Content

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7.1 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 your 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. Click the **Publish UI Action**.

5. Notice approval requests are sent to the users identified as Managers in the ITIL Knowledge Base.

6. Double-click next to **Requested** for Approver **System Administrator**.

7. Change the dropdown to **Approved**, and click **the green checkmark**.

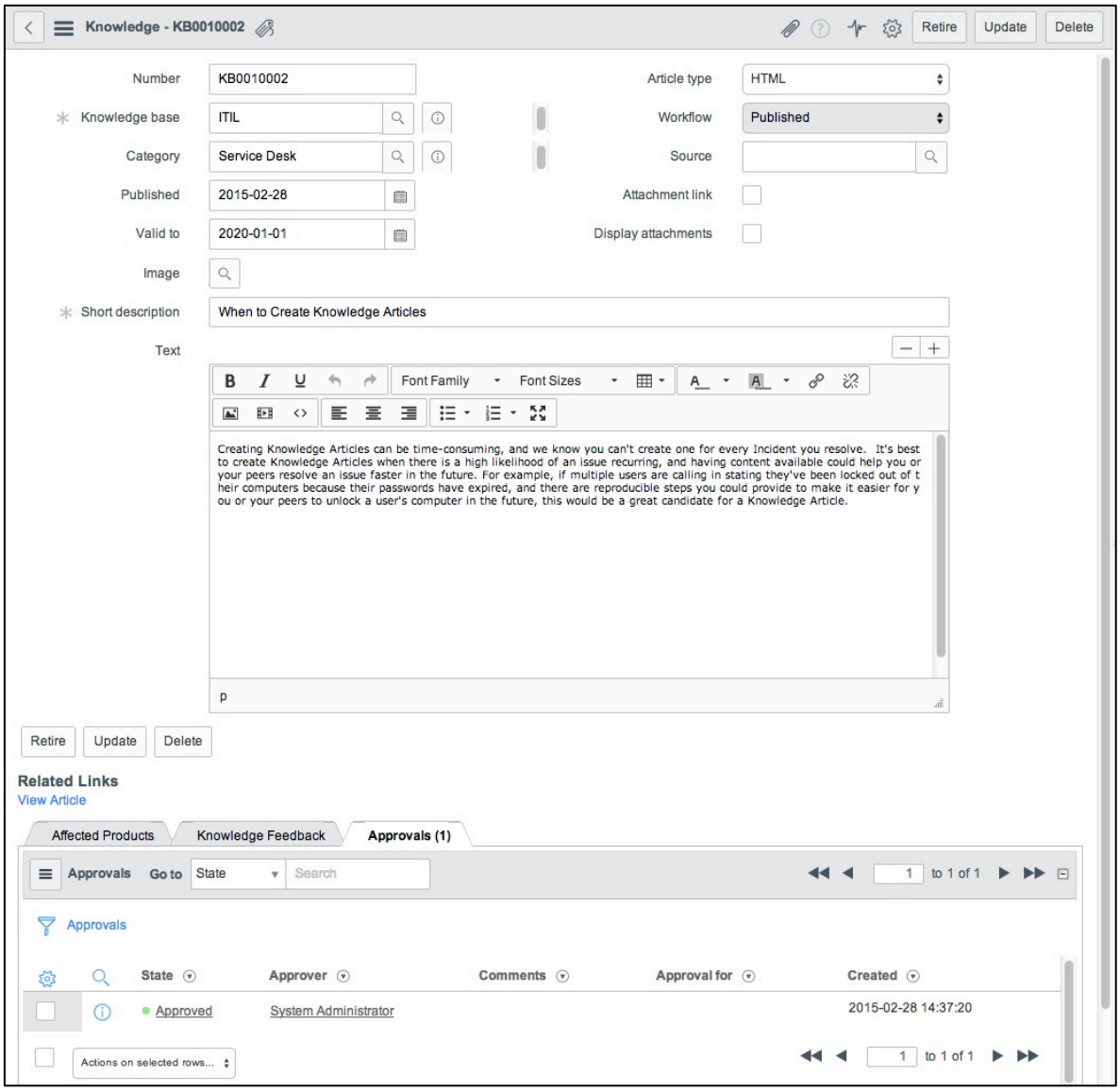
8. Click **Update**. Notice on the Knowledge table that the article is now in a workflow state of **Published**.

9. 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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7.2 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)
     - Make sure to 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. Click the **Publish** UI Action.

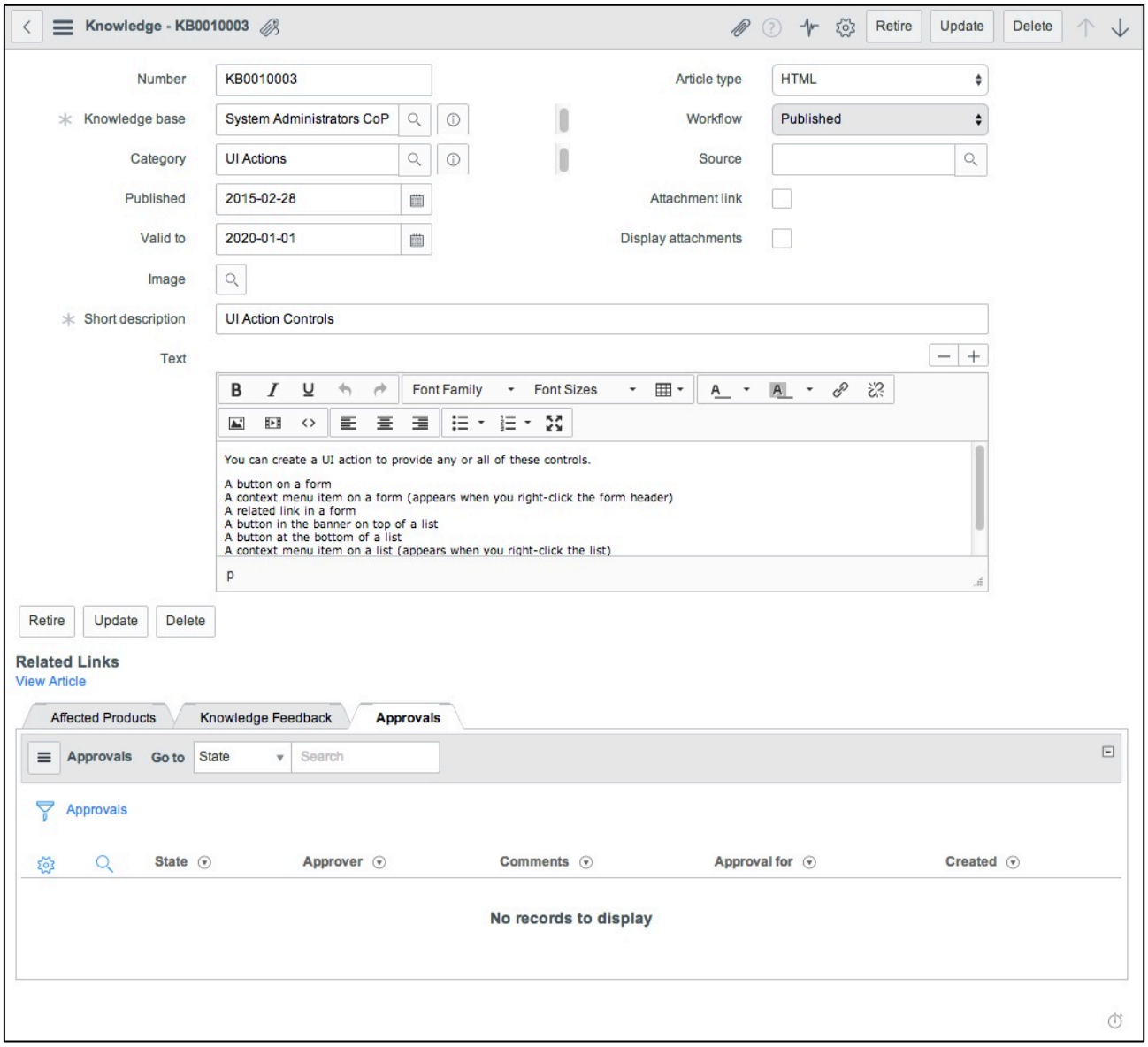
5. Notice on the Knowledge table that the article is now in a workflow state of **Published**.

6. 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

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**

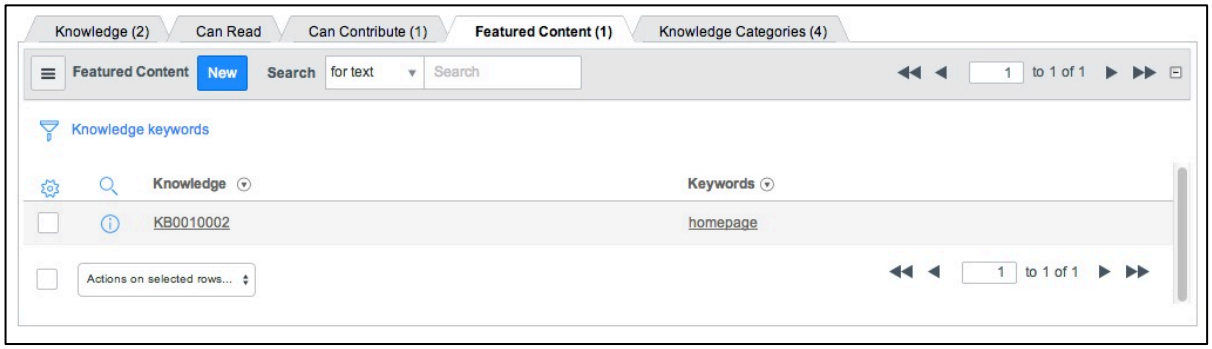
Lab 8.0 Featured Content/ Pinning

8.1 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**. Then, 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. Select **homepage**, and click **Submit**.

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Your screen should look like the example.



9. Click the **in-frame Back** button.

10. Open the **IT** Knowledge Base.

11. Open the **Featured Content** tab, noticing there are already two identified Featured Content articles, and select **New.**

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

13. Set filter for **Knowledge Base IS IT** and **Workflow IS Published**. Then, click **Run**.

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

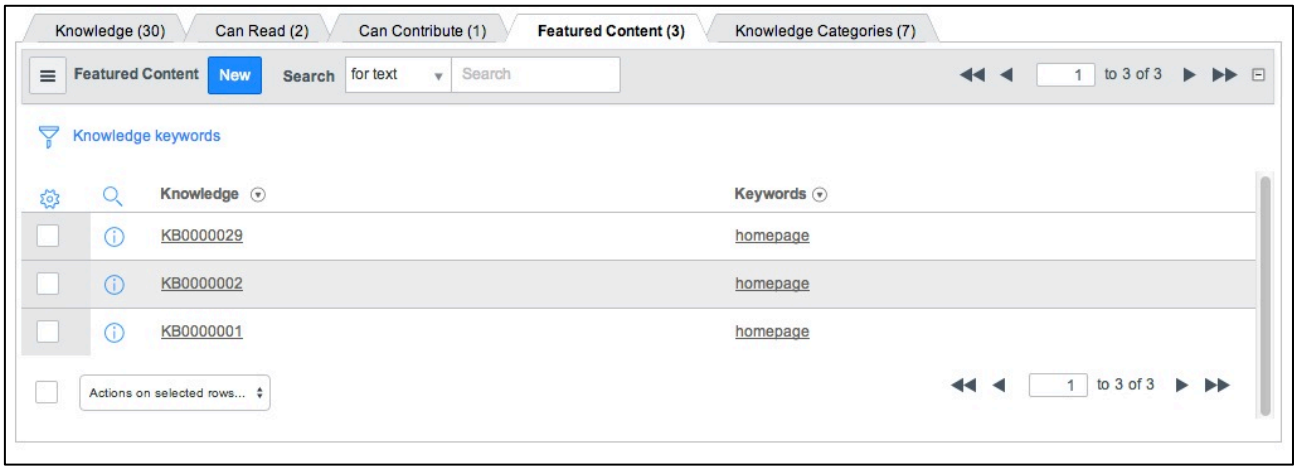
15. On the **Knowledge keyword** form, click the lock. Then, click the magnifying glass next to the **Keywords** field.

16. Select **homepage** and click **Submit**.

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Lab Success Verification

1. Your screen should look like the example.



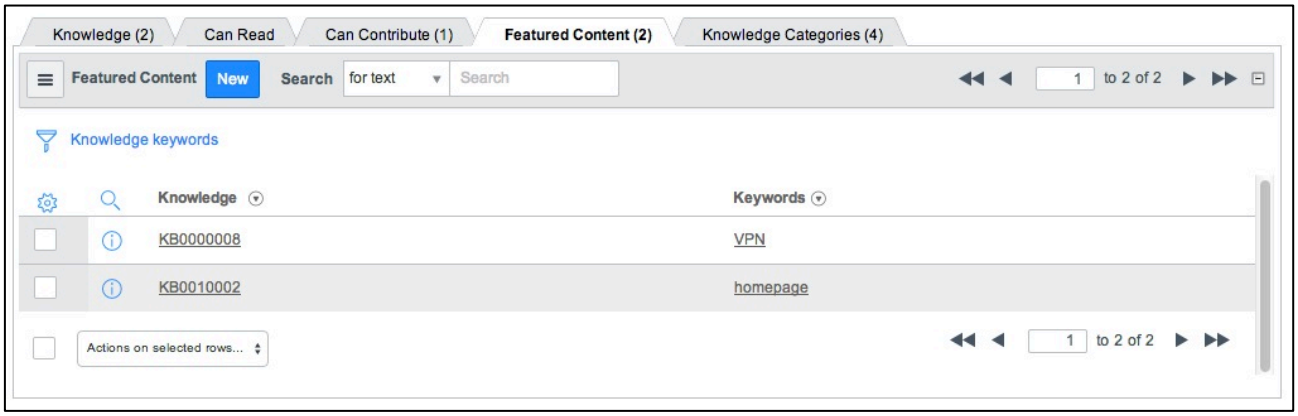
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8.2 Identify Featured Content for a Specific Query

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**. Then, click **Run**.
5. Select **KB0000008 – How to configure VPN for Apple Devices**.
6. On the **Knowledge keyword** form, click the lock. Then, click the magnifying glass next to the **Keywords** field**.**
7. Click **New**.
8. In the **Keyword** field, type **VPN**, and 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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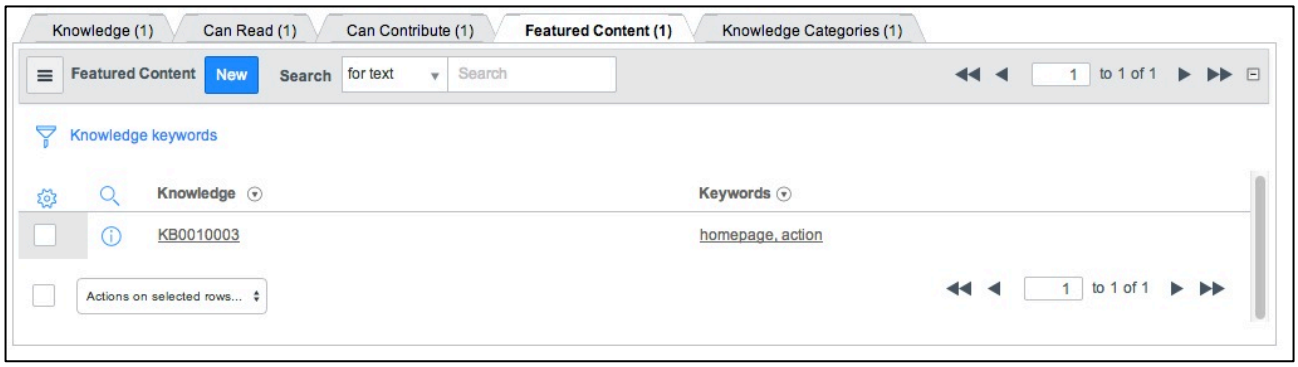
8.3 Add Additional Featured Content for Specific Queries

1. Click the **in-frame Back** button.
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**. Then, click **Run**.
6. Select **KB0000017 – What is the Windows key?**
7. On the **Knowledge keyword** form, click the lock. Then, 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. Click the **in-frame Back** button.
12. Open the **System Administrators CoP** Knowledge Base.
13. On the **Knowledge keyword** form, click the magnifying glass next to the **Knowledge** field.
14. Filter for **Knowledge Base IS System Administrators CoP** and **Workflow IS Published**. Click **Run**.
15. Select **KB0010003 – UI Action Controls**
16. On the **Knowledge keyword** form, select **homepage**. Then, click the magnifying glass next to the **Keywords** field.
17. Click **New.**
18. In the **Keyword** field, type **action**. Click **Submit**.
19. 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 9.0 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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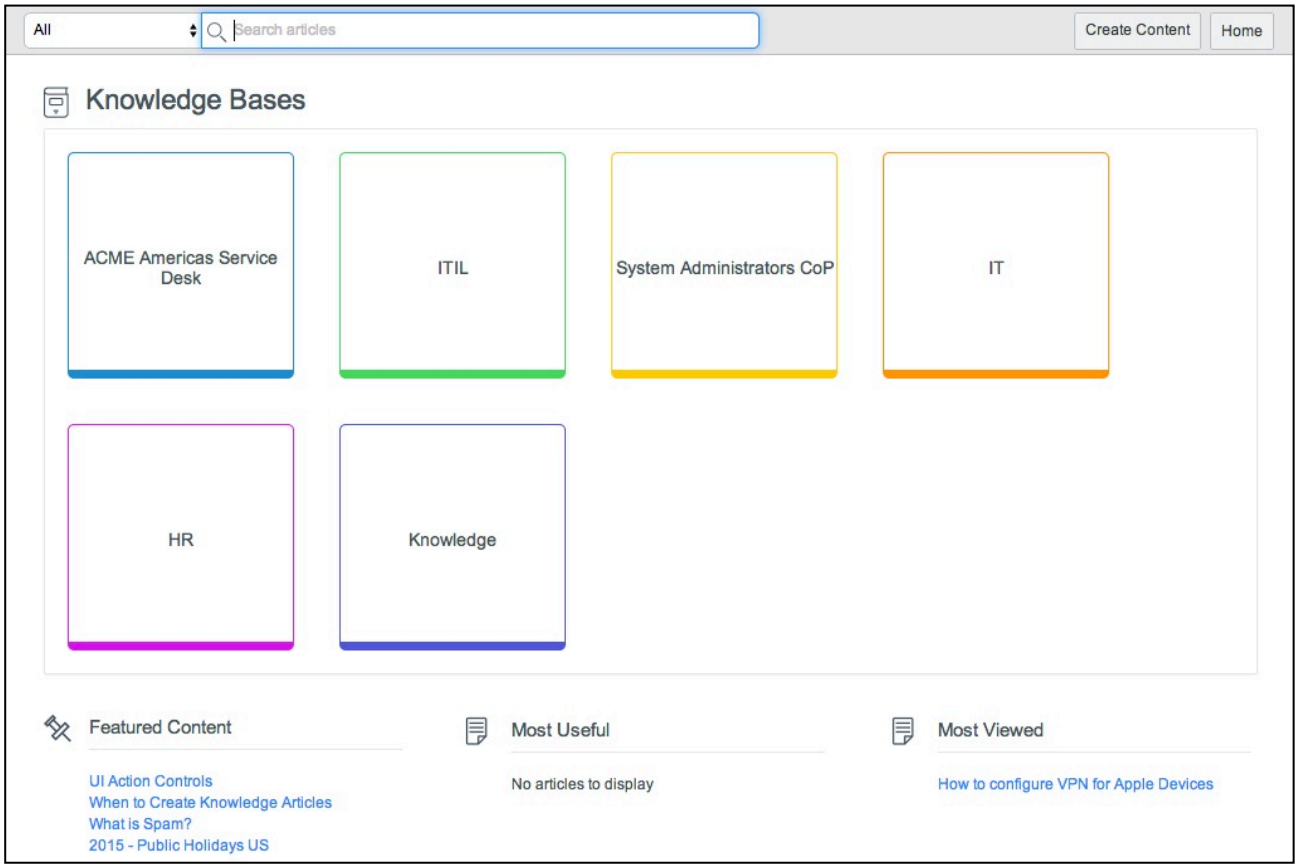
9.1 Knowledge Homepage as System Administrator

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

2. Notice, as you (System Administrator) are the owner of all six Knowledge Bases, you can view them all on the homepage.

Lab Success Verification

1. Your screen should look like the example.

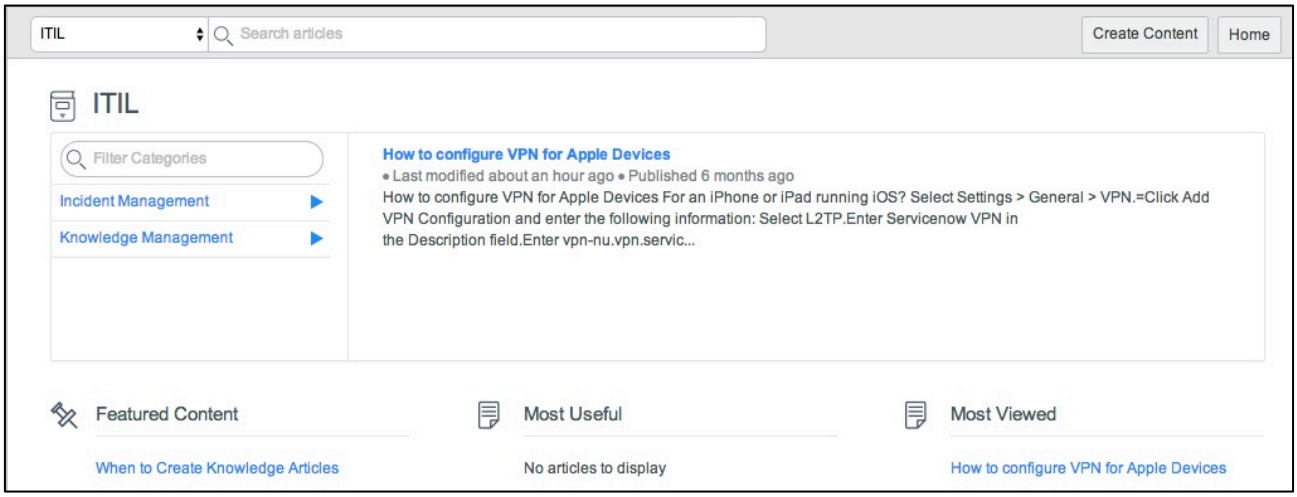


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9.2 Knowledge Browsing as System Administrator

1. Open the **ITIL** Knowledge Base, and click **Incident Management**.
2. Notice "How to configure VPN for Apple Devices," the article moved from the IT Knowledge Base is visible in the browsing frame, and "When to Create Knowledge Articles," the newly created and pinned article, is available under **Featured Content**.

   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. Notice "How to configure VPN for Apple Devices" is now listed under "Most Useful."
7. Change the Knowledge Base dropdown to **IT.**
8. Select **Operating Systems> Windows> Windows 8**, and open **'Windows: Should I upgrade to Windows 8.x?'**
9. Give the article **5 stars**, and answer **Helpful? Yes.**
10. Use the **in-frame Back** button to return to the IT Knowledge Base.
11. Notice "Windows: Should I upgrade to Windows 8.x?" is now listed under "Most Useful."

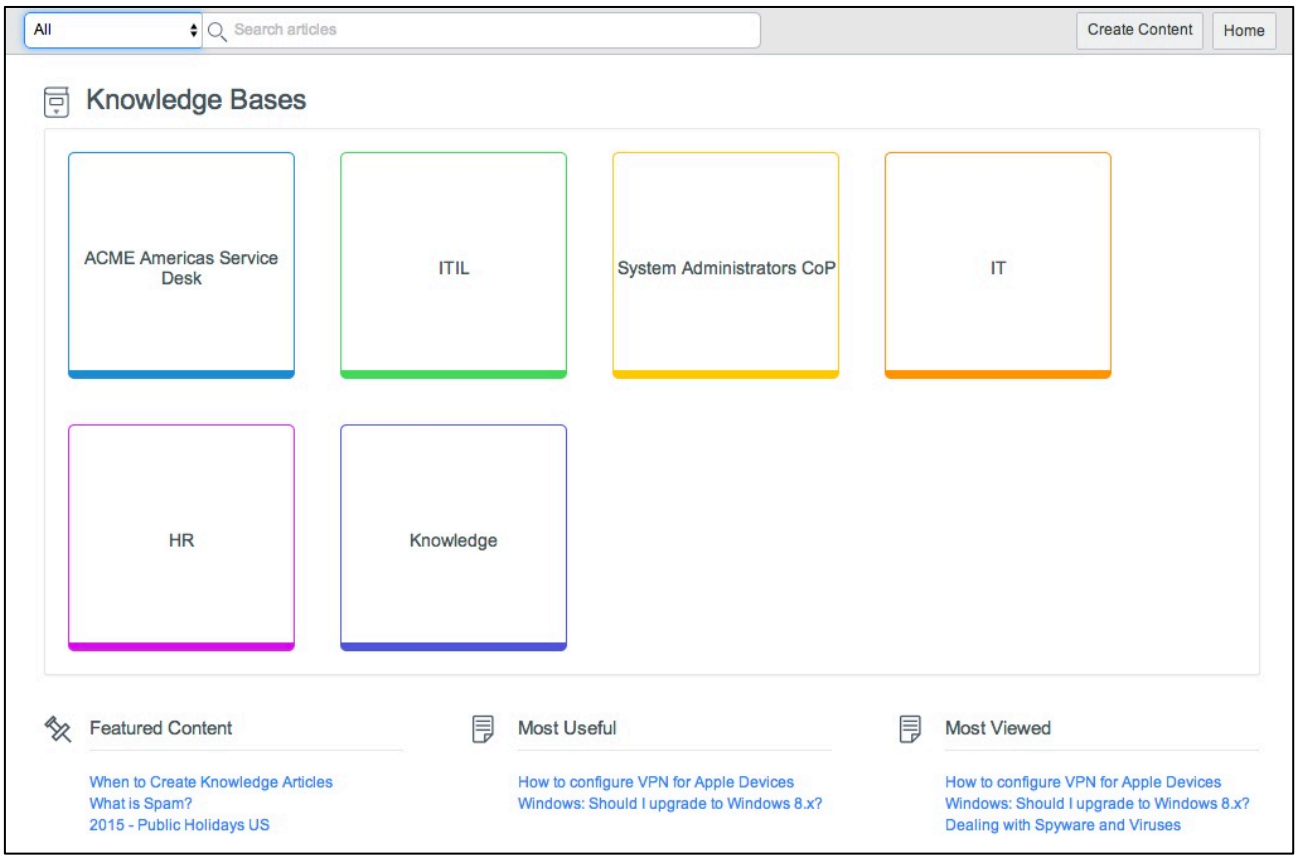
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12. Change the Knowledge Base dropdown to **All.**

13. Notice “Windows: Should I upgrade to Windows 8.x?” and “How to configure VPN for Apple Devices” are now listed under “Most Useful.”

Lab Success Verification

1. Your screen should look like the example.



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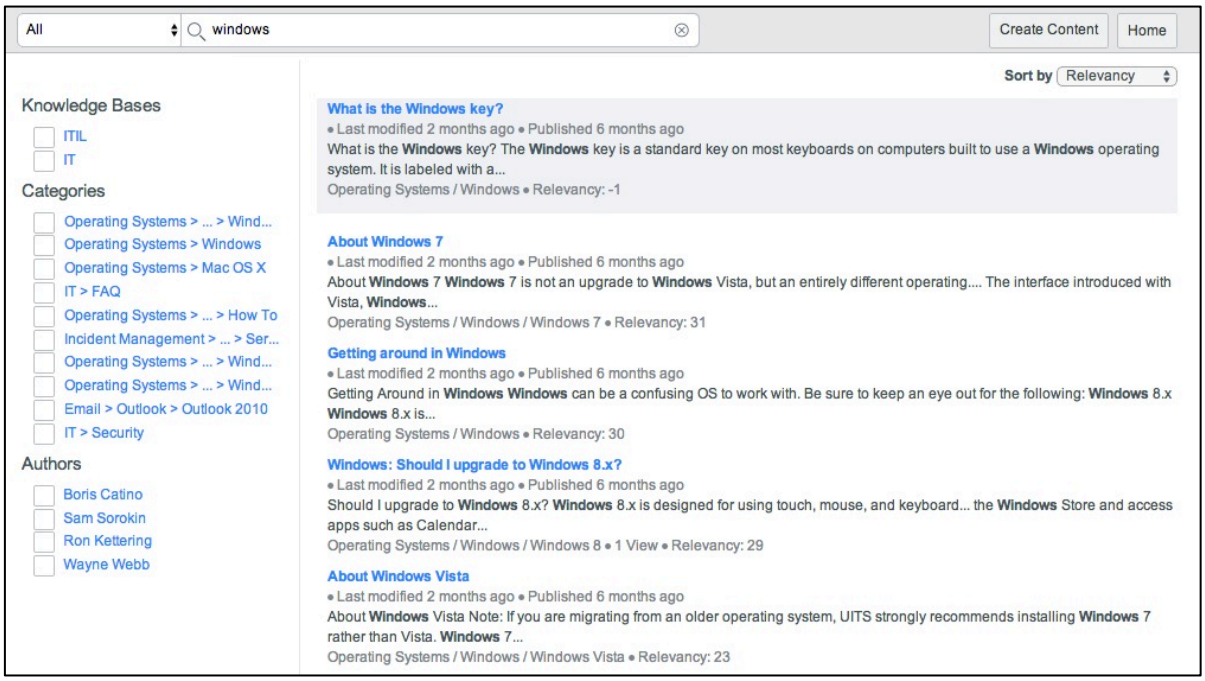
9.3 Knowledge Searching as System Administrator

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.



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

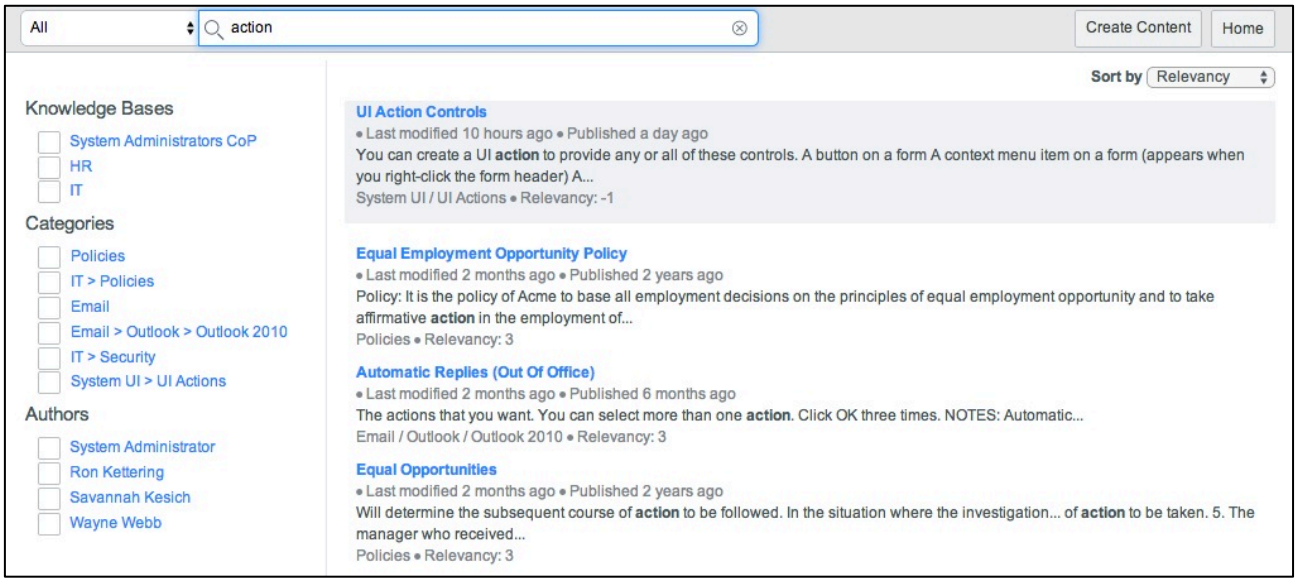
5. Notice multiple results are received, but at the top in gray-blue is “UI Action Controls,” the article we created and identified as Featured Content in the System Administrator CoP Knowledge Base for the homepage and the keyword “action.”

6. Notice you can continue to browse after searching.

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Lab Success Verification

1. Your screen should look like the example.



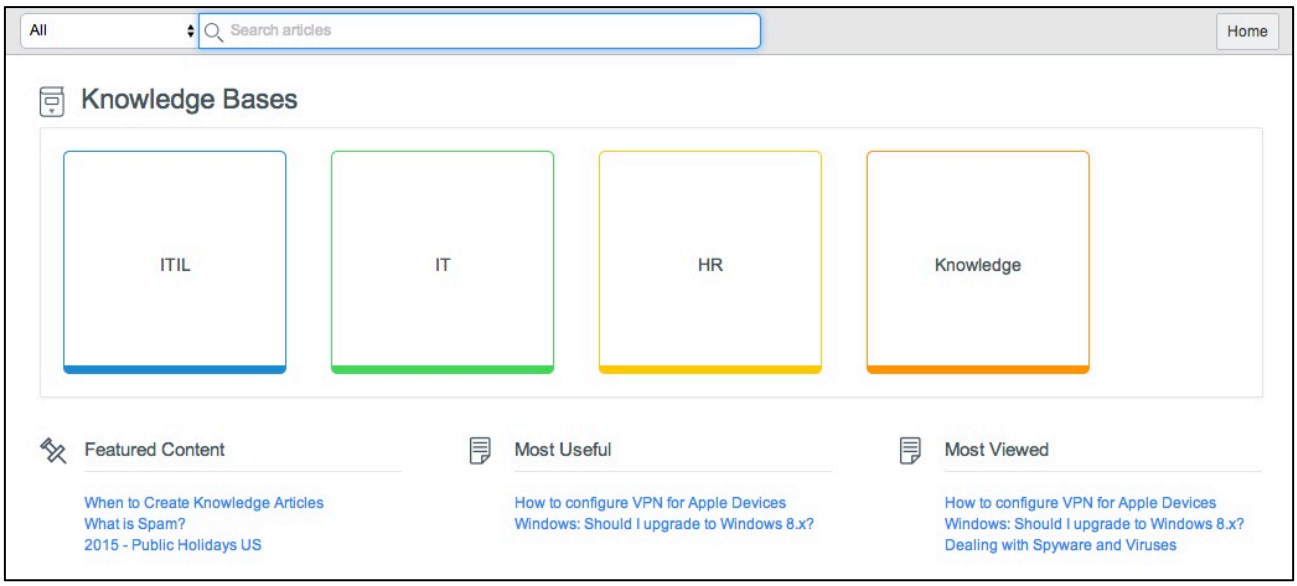
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9.4 Knowledge Homepage as User

1. Impersonate **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.



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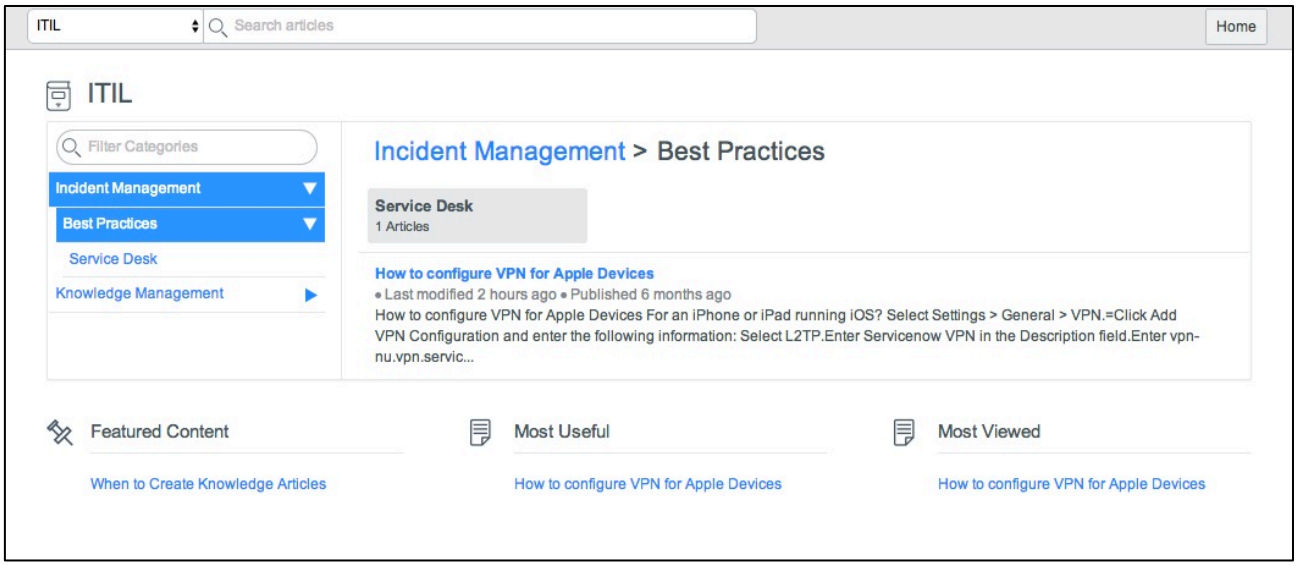
9.5 Knowledge Browsing as User

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.

Lab Success Verification

1. Your screen should look like the example.



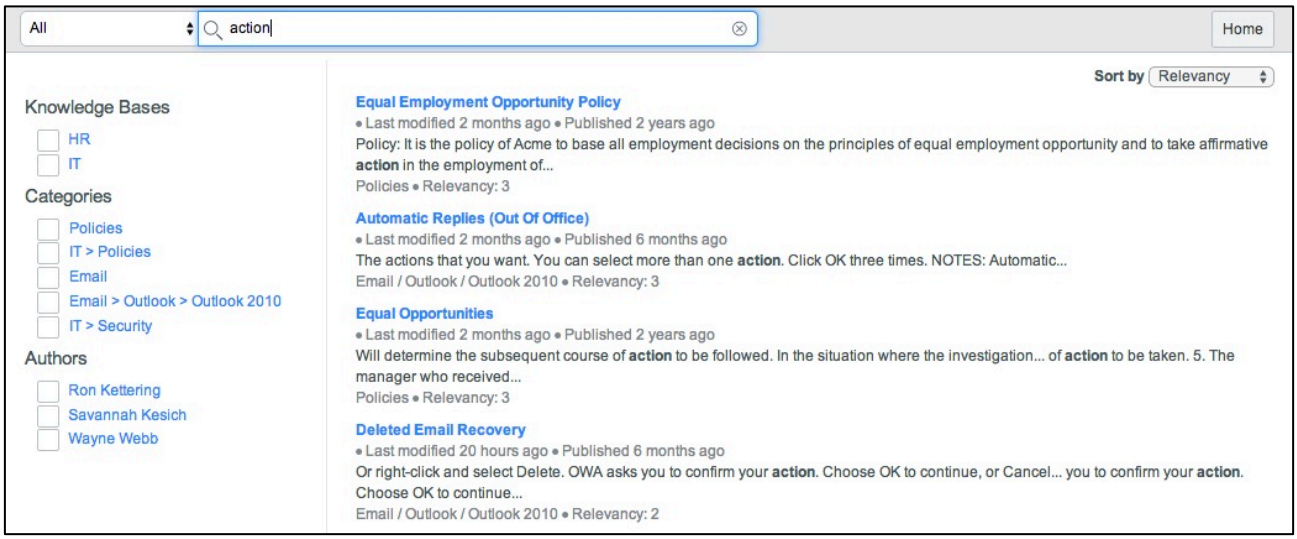
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9.6 Knowledge Searching as User

1. Return to the Knowledge Homepage, search for **windows**.
2. Notice multiple results are received, but at the top in gray-blue is “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.

Lab Success Verification

1. Your screen should look like the example.



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