

Knowledge Base Module in Service-Now

Tutorial

CERN, September 2012

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Agenda



- Basic concepts and demo in service portal (search KB articles)
- KB Process, Work-flow and Roles
- Functional Review, Layout Review and Publication
- Create or Revise a KB article How to:
 - ✓ Create a new submission for a KB article
 - ✓ Review or correct a KB article
 - √ French Translation of KB articles
 - ✓ Un-publish a KB article
 - ✓ Quick edition (for Functional Managers)
 - ✓ Create KB article from a ticket (RQF or INC)
- Mail notifications
- When to review an article?
- Key role of Functional Manager
- Some useful "Tricks and Tips"
- Documentation
- Questions?

Knowledge Base - KB module in SNOW



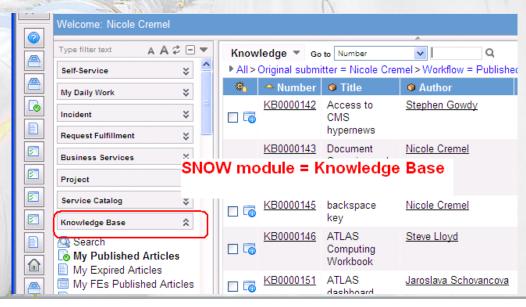
What is the Knowledge Base?

"Collection of Tips and Tricks, Frequently Asked Questions, Recipes, etc..., whatever can help <u>users</u> and <u>supporters</u> in resolving a problem, or answering a question/request."

Service-Now module "out-of-the-box"

+ Some CERN customization to fit our own needs (complete revision made in July 2012 to include many requests for changes)

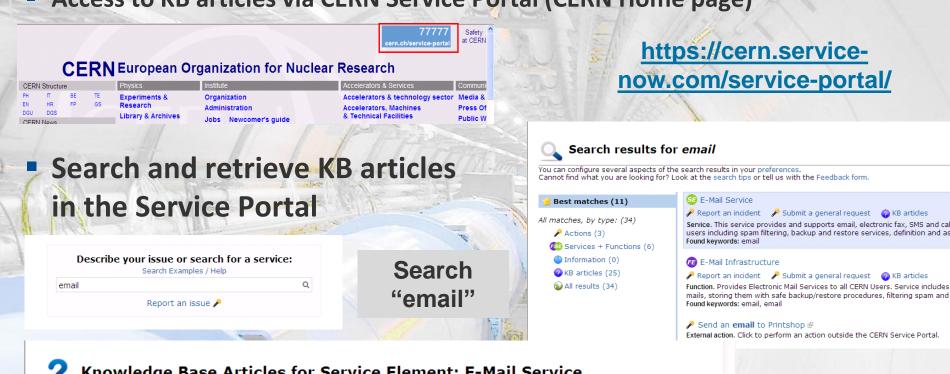
KB module access from the tool (for supporters with ITIL role)



Quick demo in service portal



Access to KB articles via CERN Service Portal (CERN Home page)



Knowledge Base Articles for Service Element: E-Mail Service

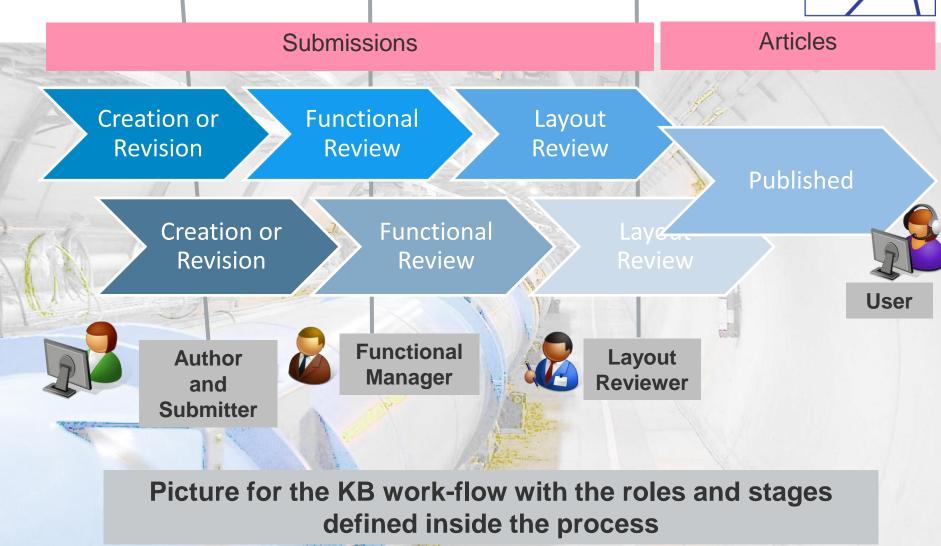
This page lists all the Knowledge Base articles related to the Service Element E-Mail Service. There is currently 1 article available. Click on the article to read it.

Topic: None

8 KB0001173: PROCEDURE pour le Service Desk: que faire avec les tickets SNOW Spam et phishing? [Visibility: Specific groups]

KB Process and Work-flow (picture 1)

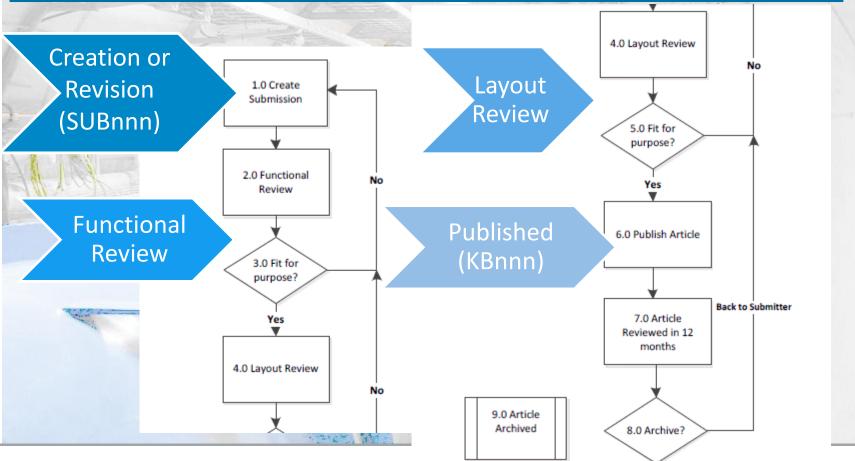




KB Process and Work-flow (picture 2)

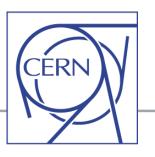


From « Detailed Process Documentation » (file <u>CERN Knowledge Management.pdf</u>)
https://services.web.cern.ch/wiki/detailed-process-documentation



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KB Process and Roles



Who is who in the Knowledge process? Author, Submitter, Functional Manager, Layout Reviewer

- Creation or Revision:
 - create new KB draft or submit KB review via the SNOW tool
 - Any "supporter" (with login access to the SNOW tool) can create new submissions for new articles attached to any FE or any SE (submission is a "Draft" article)
 - → will be registered as *author* and *original submitter* for this KB article (see next slide)
 - The FE Managers or the "original submitter" can initiate the revision for a published KB article
- Review and Approval (before publication)
 - First step: Functional Review by the FE Manager(s)
 - Final step: Layout Review by a restricted set of persons from the SM teams (IT or GS) who will validate the publication

KB Process and Roles



Original submitter

Person who has initiated the creation of a new article (registered in KB and it never changes) Revision of articles can be "submitted by" the original submitter or the Functional Managers.

Author

No active action in the process, it is just an information (person who has provided the "knowledge")

Note: "Submitter" is not necessarily the same person as the "author" (but, by default, it is the same person and it often stays like that, unless "author" is changed manually).

Functional Review

By "Functional managers" – for all articles attached to the FE they manage (well-defined support group): first check and possible changes making sure the article is correct

Layout Review

By few people from SM teams (IT and GS): last check from the "User point of view" before publication (check for KB consistency, language, is it understandable?, etc.)

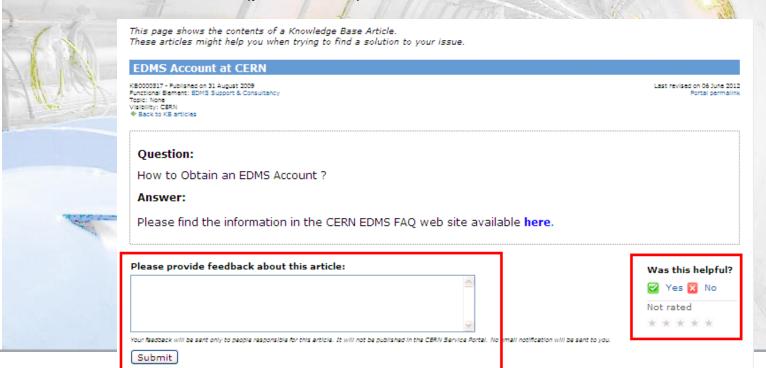
NO "crucial" changes will be made at this stage!

KB Process and Roles

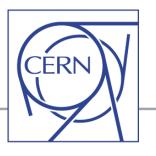


End users can only: (via the service portal)

- Access and read KB articles depending on the "visibility" parameter (explained later)
- Provide feedback (per article)

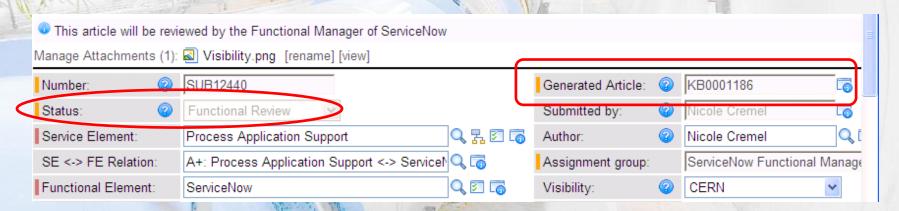


Functional Review

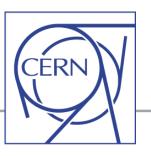


- By the Functional Manager(s) for the FE defined in the article
- Can be for:
 - ✓ a new article submission,
 - ✓ or to review a published KB article (submission for revision)

Example: Submission SUB12440 for the KB article KB0001186

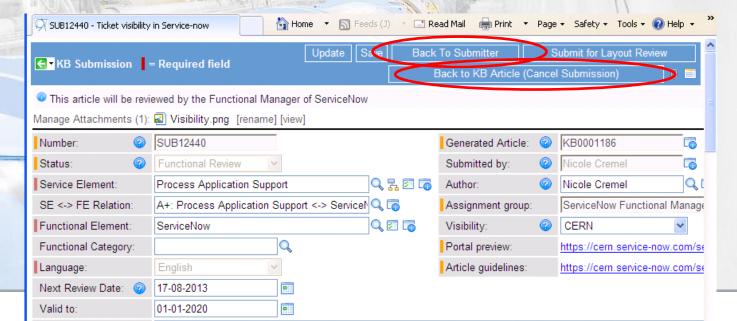


Functional Review

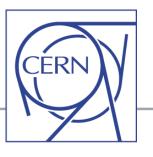


Possible actions:

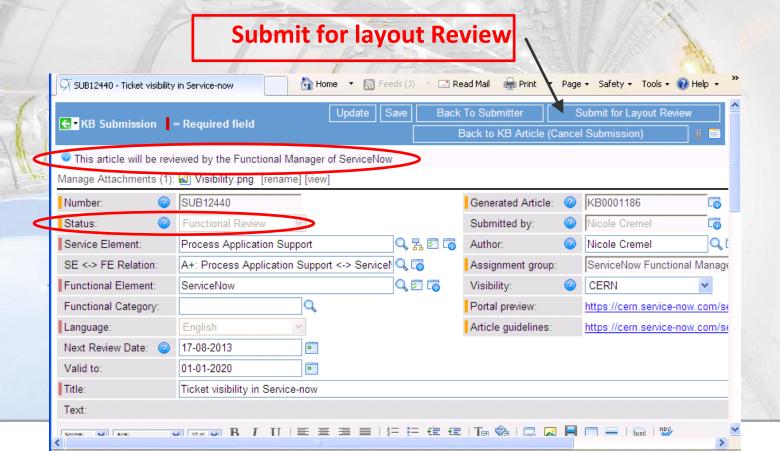
- Back to Submitter: return submission back to the person who made it requesting some changes (please write some explanations in the work notes!)
- Back to KB article (Cancel Submission): refuse the new submission and go back to the original KB article (or cancel a new article if not valid)



Functional Review



- The Functional Manager can also edit the submission and complete it.
- Finally, to validate the submission (changes are made and SUBnnn is OK):

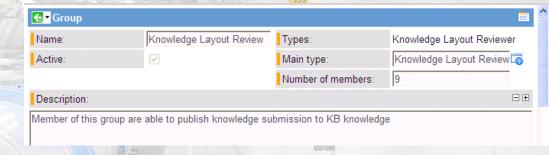


Layout Review and Publication



- Only few people in the SNOW group = "Knowledge Layout Review"
 - members of SM teams (IT and GS) can make the "Layout Review" and can therefore "Publish" a KB article

 (They are the "moderators" for KB article publication in the service portal)
- → SUBnnnn will become KBnnnn



Special case (exception in the work-flow):

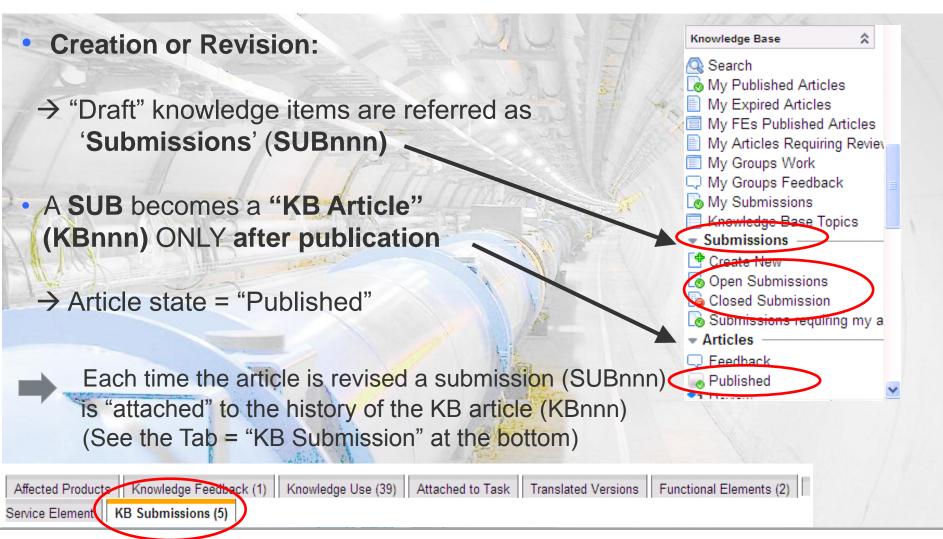
When "Visibility" is restricted to "Specific Groups",

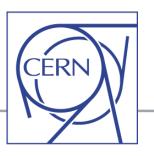
NO "Layout Review"

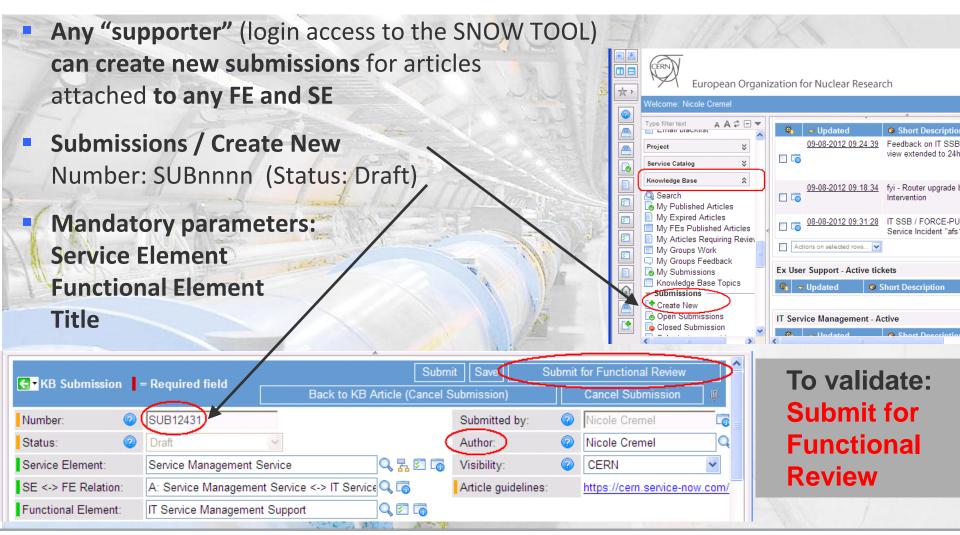
→ The FE manager(s) will have the last word for publishing the KB article and to make it visible in the portal for a restricted group of users.

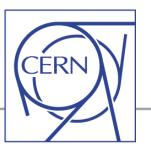
Create or Revise a KB article











Optional parameters:

Visibility: to define access to this KB
 Possible values:
 CERN / Public / Supporters / Specific groups
 (default = CERN, i.e. logged-in users)



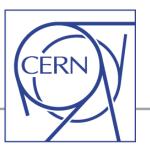
• Next Review Date: date when the article shall be revised (default = 1 year after creation or last review)
Next Review Date:

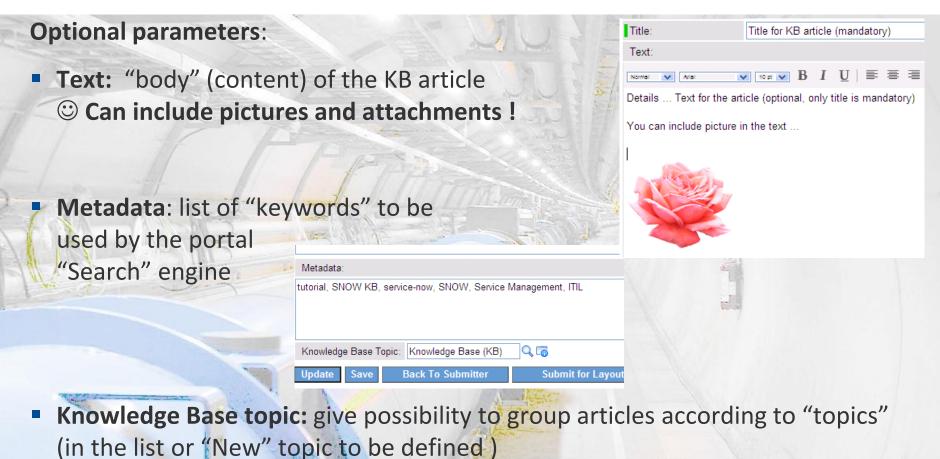
 Next Review Date:
 15-08-2013

 Valid to:
 01-01-2020

Valid to: expiration date (article will be unpublished and archived)
 (default = 01-01-20)

Example, topic = "Knowledge base (KB)":





https://cern.service-now.com/service-portal/topic.do?topic=Knowledge Base (KB)



On-line demo (in "training" version): https://cerntraining.service-now.com

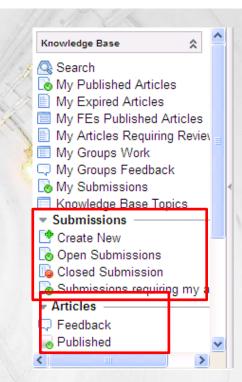
- Create a new submission for a KB article
- Fill-in mandatory parameters
- Show optional parameters
- Save / Submit for Functional Review



Important to understand (Submissions versus Articles):

- Only a "submission" (SUBnnn) is created so far
- SUBnnn becomes KBnnn after "Publish"
 - For a new KB submission you do NOT know yet the "KB number" (KBnnn) of the future article published
 - The KB number is given after the 1st publication (usually after the layout review)

<u>Different for the "Review" of a Published KB article:</u>



The KB article number (KBnnn) is known and kept independently of the associated new and future submissions (SUBnnn) generated at each revision.

(Continue the demo until publication)

Review or correct a KB article



New articles can be submitted by any supporter, but the revision of a published article can be initiated ONLY by:

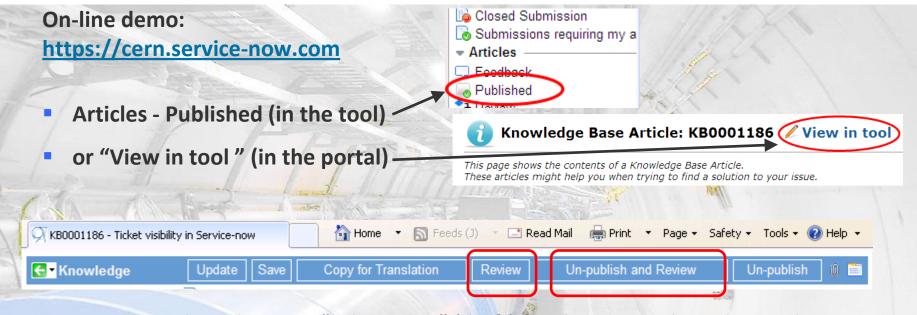
- one Functional Manager OR by
- the "original submitter" OR by
- one Layout reviewer (few people with special privileges)

In addition, the SNOW tool will invite Functional Managers to perform a revision as soon as the "Next Review Date" registered in the KB article has expired (Email sent to Functional Managers)

Language:	English	~
Next Review Date: 🔞	24-08-2013	0
Valid to:	01-01-2016	0

Review or correct a KB article

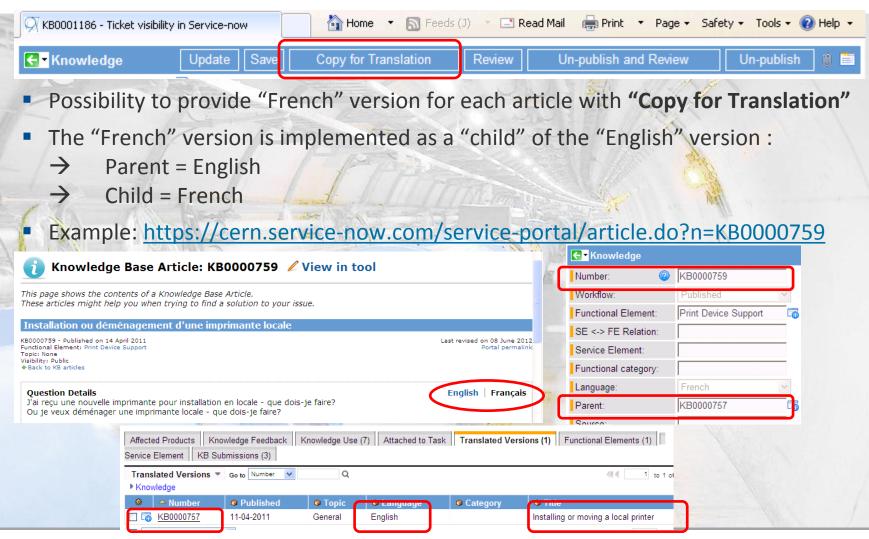




- Review: launch a new "submission" (draft) for this KB article and start the process (-> Functional Review -> Layout Review -> Publish) The initial KB article (before re-publication of the new submission) is still visible to end-users via the portal
- Un-publish and Review: idem BUT
 The initial KB article is NO LONGER visible to end-users via the portal

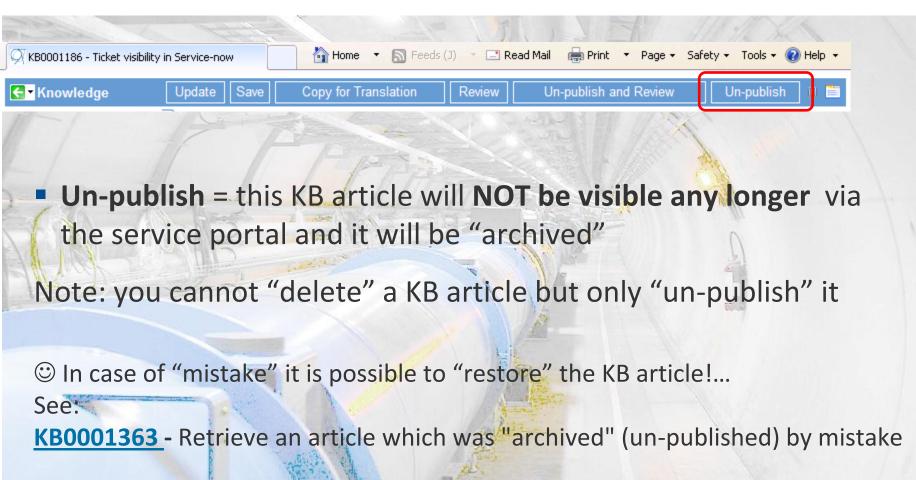
French Translation of KB articles





Un-publish a KB article



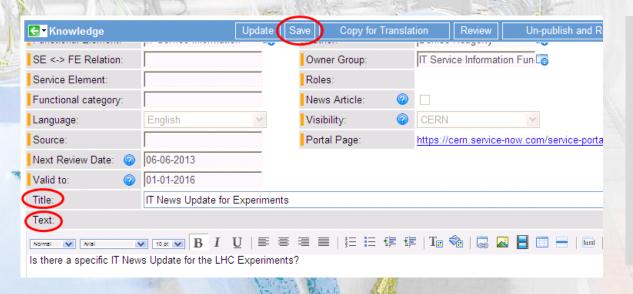


Quick edition (for Functional Managers)



Functional Manager(s) - for KB articles attached to their FEs - can "by-pass"the full KB process (Submission → Functional Review → Layout Review → Publication) BUT ONLY for small corrections in the title or text (e.g. typo, missing sentence, etc.) – It should NOT be abused!

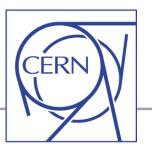




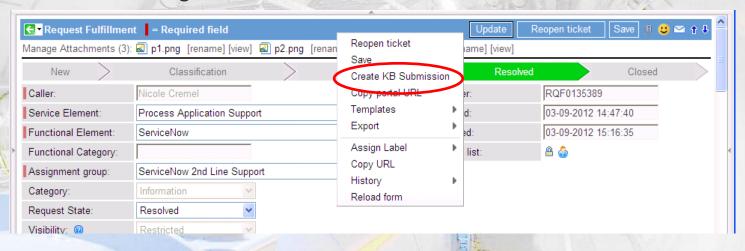
Please note:

- the Layout Review group will be notified of this "quick review"
- 2. The "Next Review Date" is NOT reset and is kept as before (for a "normal" review process at this date)

Create KB article from a ticket (RQF or INC)

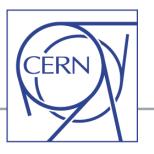


- Possibility to create a KB article from a SNOW ticket (Incident or Request)
- The ticket must be is state = Resolved i.e. the "Solution" is filled-in
- Mouse button right- click → "Create KB Submission"



A KB submission is automatically created (SUBnnn) with the "Text" pre-filled with the Solution which was written in the ticket
 You can edit this text and continue the KB process (→ Functional Review → Layout Review → Publish)

Mail notifications



For all actions mail notifications are sent (as defined by the process

and the work-flow),

for instance, mails are sent for:

Functional Review
 [The FE Manager(s) will be notified]

Layout Review
 [Members of the layout review group will be notified]

Back to Submitter
 [The submitter and the FE Manager(s) will be notified]

From: CERN Service Desk - NO REPLY [noreply-service-desk@cern.ch]

To: Barbara Brugger; Isabel Fernandez Gonzalez; Nick Ziogas; Patricia Mendez Lor Reinoud Martens; Nicole Cremel

Cc:

Subject: SUB12459: In Knowledge Layout Review

SUB12459 is waiting for review.

Title: What kind of data should I store in CASTOR?

Author: Jan Iven

Submitter: Belinda Chan Kwok Cheong

Please do not reply to this e-mail. It is an automatic notification.

- Publish: FINAL STEP [The original submitter, the author and the FE Manager(s) will be notified]
- Un-publish: [The original submitter and the FE Manager(s) will be notified]
- Expiration of "Next Review Date": [The FE Manager(s) will be notified 2 weeks in advance + reminders]
- Quick edition by Functional Manager(s) [Members of the layout review group will be notified]

When to review an article?



- When users send feedback to require modifications or improvements in a KB article
 - Any feedback will be notified to the original submitter and to the FE manager(s)
 - ✓ If needed FE manager(s) should consider the review of the article
- At any moment a KB article might require any change:
 the FE manager(s) are responsible for the content of all KB articles
 linked to their FE!
- When the "Next Review date" expires
 - ✓ FE manager and submitter will be notified 2 weeks in advance
 - If no changes are needed and the article is still valid, this date can be extended quickly by-passing the full review process See: KB0001369 automatic review and extension of the "Next Review" date

Key role of Functional Manager





Some useful "Tricks and Tips"



- Many "tricks and tips" are provided via KB articles in the Service Portal, More articles will be published according to your needs and feedback!
- Some examples:
 - ✓ "Update" button versus "Save" in Service-Now (SNOW) (KB0001361)
 - ✓ Cannot access a KB article why? (KB0000853)
 - ✓ KB articles Link one article to several Functional Elements (FE) or several Service Elements (SE) (KB0001381)
 - ✓ KB articles Attach a file or include a picture (KB0001376)
 - Cannot edit (modify) a KB article fields are read-only and only "Copy for Translation" is available (KB0001355)
 - ✓ KB articles "EXPIRED ARTICLE" displayed at the top of the page (KB0001371)

(Open the links of these KB articles to see the details!)

Documentation



- All the documentation on the Knowledge Base module, including "Tips and tricks" is available as "KB articles" with the topic = "Knowledge Base (KB)"
- See: https://cern.service-now.com/service=portal/topic.do?topic=Knowledge Base (KB)
 More articles will be published according to your needs and feedback!



Questions?



Thanks for your attention! ©

Do you have questions?

Need more demos?

Contact: service-desk@cern.ch or submit a request via the Service Portal to "IT Service Management"