

Knowledge Base Module in Service-Now

Tutorial

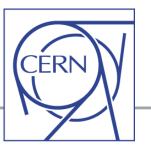
CERN, September 2012

Nicole Crémel, IT Service Management

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 ?



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."

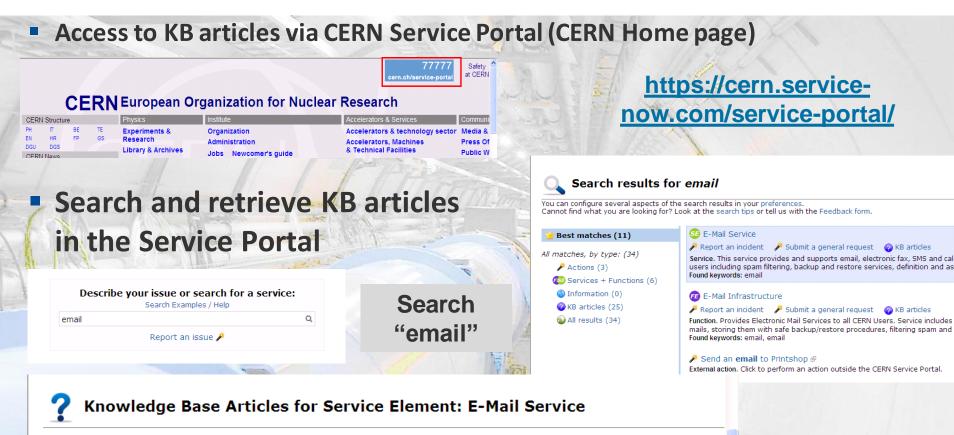
Service-Now module "out-of-the-box"

+ 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)

Welcome: Nicole Cremel			
Type filter text A A C	Knowledge ▼ Go ► All > Original submi		Norkflow = Published
My Daily Work 😵	🗞 🔶 Number	Title	Author
Incident ¥	<u>KB0000142</u> □ □	Access to CMS hypernews	<u>Stephen Gowdy</u>
Business Services	<u>квооот43</u> // module = К	· · · ·	Nicole Cremel
Project	i modale – h	anowieuge	Dust
Service Catalog V Knowledge Base	🗆 🐻 <u>KB0000145</u>	backspace key	Nicole Cremel
Search My Published Articles My Expired Articles	□ 🗟 <u>KB0000146</u>	ATLAS Computing Workbook	Steve Lloyd
My FEs Published Articles	□ 🗟 <u>KB0000151</u>	ATLAS	Jaroslava Schovancova

Quick demo in service portal

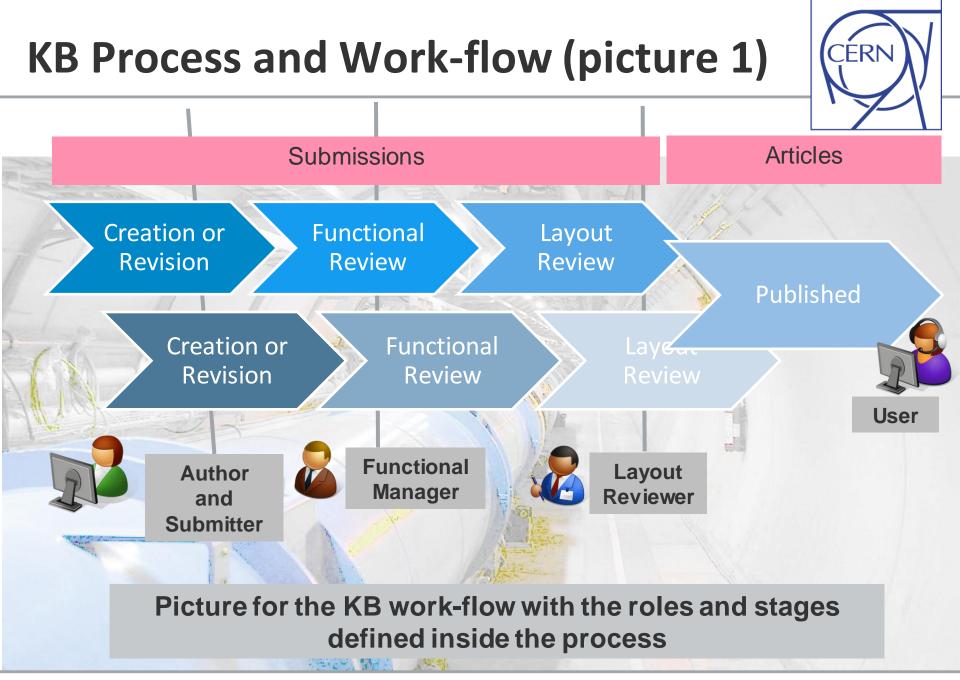




This page lists all the Knowledge Base articles related to the Service Element E-Mail Service. There is currently 1 article available. Click on the article to read it.

Topic: None

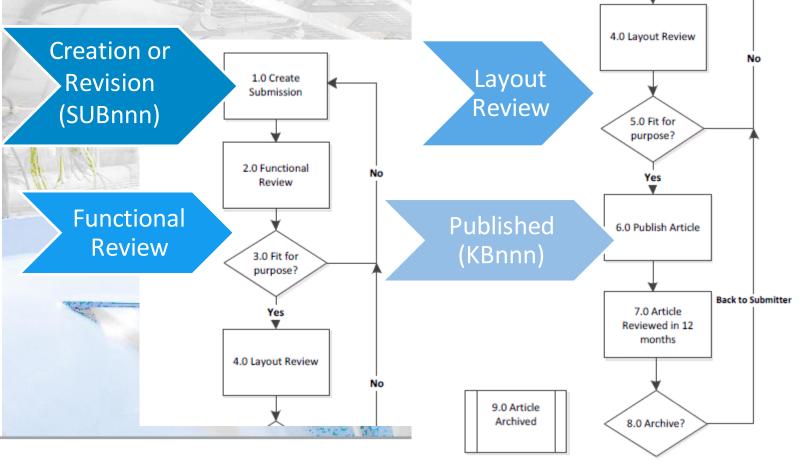
KB0001173: PROCEDURE pour le Service Desk: que faire avec les tickets SNOW Spam et phishing?[Visibility: Specific groups]



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





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

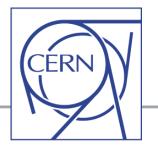
Creation or Revision: create new KB draft or submit KB review via the SNOW tool

- 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

Ξ.

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)

This page shows the contents of a Knowledge Base Article. These articles might help you when trying to find a solution to your issue.

EDMS Account at CERN

KB0000517 - Published on 31 August 2009 Punctional Element: EDMS Support & Consultancy Topic: None Visibility: CERN # Back to KB articles Last revised on 06 June 2012 Portal permailink

Question:

How to Obtain an EDMS Account ?

Answer:

C. Auto

Please find the information in the CERN EDMS FAQ web site available here.

Please provide feedback about this article:		Was this helpful?
		🗹 Yes 🔀 No
		Not rated
		* * * * *
Your feedback will be sent only to people responsible for this article. It will not be published in the CERN Service Portal. No	mall notification will be sent to you.	
Submit		

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

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	This article will be reviewed.	ewed by the Functional Manager of ServiceNow	1					
	Manage Attachments (1):	🖾 Visibility.png [rename] [view]						
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<	Status: 💿	Functional Review		Submitted by:	0	Nicole Cremel	- 	
	Service Element:	Process Application Support]Q 74 🖾 🗖	Author:	0	Nicole Cremel	Q (
	SE <-> FE Relation:	A+: Process Application Support <-> ServiceN	Q 🐻	Assignment group:		ServiceNow Functional I	Manage	£
	Functional Element:	ServiceNow	Q 🖸 🐻	Visibility:	0	CERN	*	
			15-1 · · · · · · · · · · · · · · · · · · ·					

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)

	📿 SUB12440 - Ticket visibility	in Service-now		ead Mail 🛛 🖶 Print 🔻	Page	🔹 Safety 👻 Tools 👻 🔞	Help 🗸 👋
	ۥKB Submission =	= Required field		: To Submitter Back to KB Article (Ca		ubmit for Layout Revie I Submission)	
	This article will be reviewed.	ewed by the Functional Manager of ServiceNow					
	Manage Attachments (1):	Visibility.png [rename] [view]					
	Number: 🥥	SUB12440		Generated Article:	0	KB0001186	
-	Status: 🧿	Functional Review		Submitted by:	0	Nicole Cremel	6
	Service Element:	Process Application Support	Q 🖁 🖾 🐻	Author:	2	Nicole Cremel	Qt
	SE <-> FE Relation:	A+: Process Application Support <-> ServiceN	Q 🐻	Assignment group:		ServiceNow Function	al Manage
	Functional Element:	ServiceNow	Q 🗹 🐻	Visibility:	2	CERN	*
	Functional Category:	Q		Portal preview:		https://cern.service-no	<u>ow.com/se</u>
	Language:	English		Article guidelines:		https://cern.service-no	ow.com/se
	Next Review Date: 🧿	17-08-2013					
	Valid to:	01-01-2020					

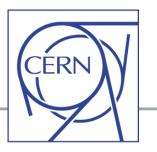
Functional Review



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

	1	Subm	it for lay	out Re	view			AR
	🛱 SUB12440 - Ticket visibility	in Service-now	Home - 🔊 Fee	eds (J) 🔹 📑 Re	ead Mail 🛛 🖶 Print	Page	→ Safety → Tools →	Help 🔹 »
	ۥKB Submission =	= Required field	Update		To Submitter Back to KB Article (C		ubmit for Layout Revie Submission)	ew 📄 🏠
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1	Manage Attachments (1):	Visibility.png [rename	e] [view]					
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	Status: 🥝	Functional Review			Submitted by:	0	Nicole Cremel	6
	Service Element:	Process Application Sup	port	Q 7 10 🔽	Author:	2	Nicole Cremel	Q
	SE <-> FE Relation:	A+: Process Application	Support <-> Service!	Q 🐻	Assignment group:		ServiceNow Function	al Manage
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	Functional Category:		Q		Portal preview:		https://cern.service-n	ow.com/se
	Language:	English	*		Article guidelines:		https://cern.service-n	ow.com/se
	Next Review Date: 🧿	17-08-2013	•					
	Valid to:	01-01-2020	•					
	Title:	Ticket visibility in Service	-now					
	Text:							
	Normal Add Arial			= != (E (E	- To 🐟 🗔 🗔		🥅 💻 Themi ABS	>

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

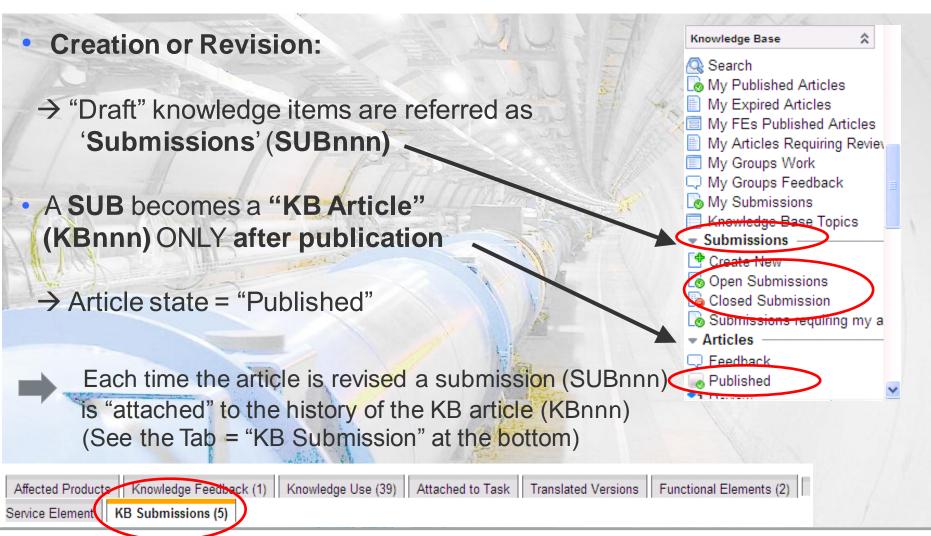
Group	Knowledge Layout Review	Types:	Knowledge Layout Reviewer
Ivame.	IKIIOwiedge Layout Review	I ypes.	Kilowiedge Layout Reviewei
Active:		Main type:	Knowledge Layout Review 🐻
		Number of members:	9
Description:			- +
Member of this grou	ip are able to publish knowledge su	ubmission to KB knowledg	ge

 Special case (exception in the work-flow): When "Visibility" is restricted to "Specific Groups", NO "Layout Review"

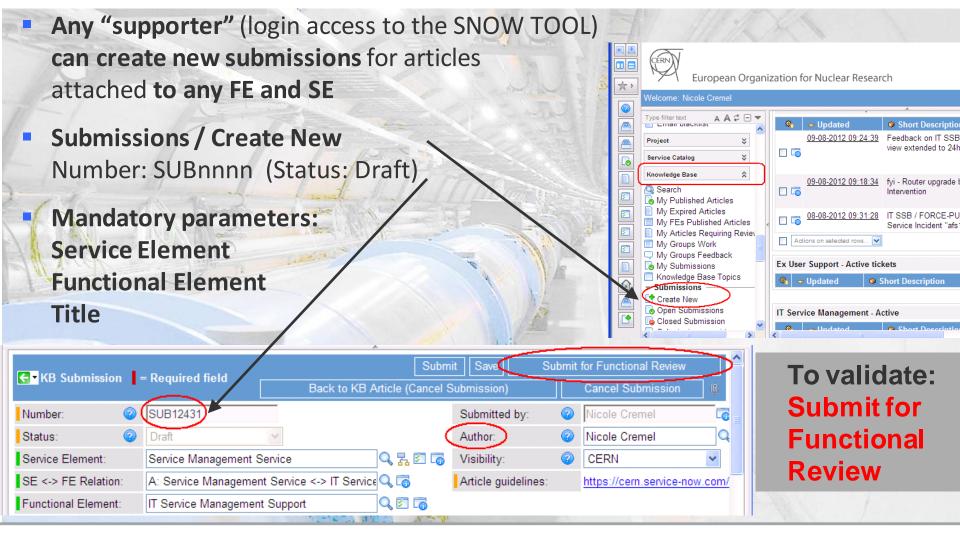
→ The FE manager(s) will have the last word for publishing the KB article and to make it visible in the portal for a restricted group of users.

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)

Visibility:
Portal preview:
Article guidelines:

Valid to:

CERN	
CERN	n/e
Public	
Supporters	n/s
Specific groups	

15-08-2013

01-01-2020

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

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

•

Optional parameters:

Text: "body" (content) of the KB article
 Can include pictures and attachments !

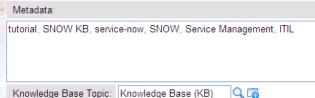
Title:	Title for KB article (mandatory)			
Text:				
Normal V Arial V	• • • • • • • • • • • • • • • • • • •			
Details Text for the artic	cle (optional, only title is mandatory)			

You can include picture in the text ...



Submit for Layou

 Metadata: list of "keywords" to be used by the portal "Search" engine



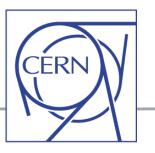
Back To Submitter

Save

Update

 Knowledge Base topic: give possibility to group articles according to "topics" (in the list or "New" topic to be defined)
 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

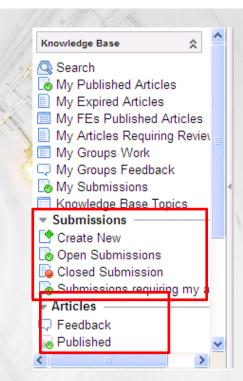
Important to understand (Submissions versus Articles):

- 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)

Different for the "Review" of a Published KB article :

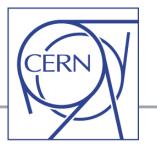
The KB article number (KBnnn) is known and kept independently of the associated new and future submissions (SUBnnn) generated at each revision.

(Continue the demo until publication)





Review or correct a KB article



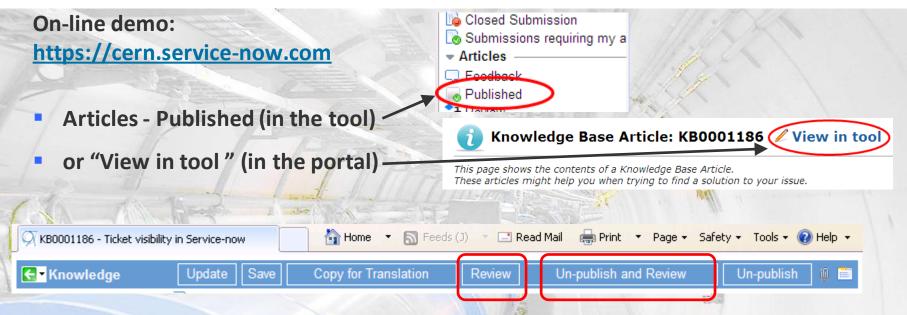
New articles can be submitted by any supporter, but the revision of a published article can be initiated ONLY by:

- 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)

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

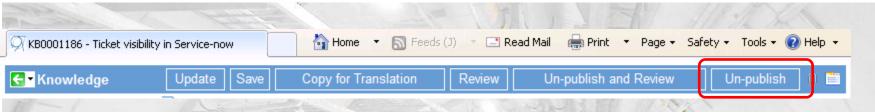


KB0001186 - Ticket visibility in Service-now	Home 🔹 🔊 Feeds	(J) 🚽 🖃 Read Ma	ail 🖶 Print 🝷 Page	🔹 Safety 👻 Tools 👻 🕢 Help ୟ						
Knowledge Update Save	Copy for Translation	Review	Un-publish and Revie	w Un-publish 🔘 🗮						
 Possibility to provide "Fi 	ench" version for	each articl	le with "Cop	y for Translation"						
The "French" version is i	mplemented as a	"child" of	the "English'	version :						
→ Parent = English	FRAN			An						
\rightarrow Child = French			S. Kar							
/ child = french	the state of the second		A CALLER AND A CAL	aff.						
Example: <u>https://cern.se</u>	ervice-now.com/s	ervice-port	al/article.do	?n=KB0000759						
Knowledge Base Article: KB0000759	/ View in tool		Knowledge							
		III.	Number: 📀	KB0000759						
This page shows the contents of a Knowledge Base Article. These articles might help you when trying to find a solution to yo	ır issue.	=	Workflow:	Published						
Installation ou déménagement d'une imprimante loca	le		-	Print Device Support						
KB0000759 - Published on 14 April 2011 Functional Element: Print Device Support		revised on 08 June 2012	SE <-> FE Relation:							
Topic: None Visibility: Public & Back to KB articles			Service Element: Functional category:							
			Language:	French						
Question Details J'ai reçu une nouvelle imprimante pour installation en locale - que		nglish Français		KB0000757						
Ou je veux déménager une imprimante locale - que dois-je faire?			Sourco	P						
	Affected Products Knowledge Feedback Knowledge Use (7) Attached to Task Translated Versions (1) Functional Elements (1)									
Service Element KB Submissions (3)	_									
Translated Versions ▼ Go to Number ► Knowledge	▼ Q		1 to 1 of							
🔕 🗠 Number 🔷 Published	© Topic 🔷 Language	© Category	-							
□ □ □ □ <u>KB0000757</u> 11-04-2011	General English	Installin	ng or moving a local printer							

Un-publish a KB article

See:





Un-publish = this KB article will NOT be visible any longer via the service portal and it will be "archived"

Note: you cannot "delete" a KB article but only "un-publish" it

☺ In case of "mistake" it is possible to "restore" the KB article!...

KB0001363 - Retrieve an article which was "archived" (un-published) by mistake



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 !

Edit directly the KB article: Title / Text + Save

€ - Knowledge	Upda	ate Save	Copy for T	ranslation	Review	Un-publish and R
SE <-> FE Relation:		Owne	er Group:	IT S	Service Informat	ion Fun 🐻
Service Element:		Roles	8:			
Functional category:		News	Article:	2		
Language:	English 👻	Visib	ility:	CE	RN	~
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Next Review Date: 🥝	06-06-2013					
Valid to: 📀	01-01-2016					
Title:	IT News Update for Experin	ments				
Text:						
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Is there a specific IT New	vs Update for the LHC Experi	iments?				

Please note:

- 1. 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"

G - Request Fulfillmen	t = Required field		Update R	leopen ticket 🛛 Save 🖉 🙂 🖻	a 🕂 🕈 🚽
Manage Attachments (3):	🗟 p1.png [rename] [view] 🗟 p2.png [rena		iame] [view]		
New >	Classification	Save Create KB Submission	Resolved	Closed	
Caller:	Nicole Cremel	Copy portal URL	ər:	RQF0135389	_
Service Element:	Process Application Support	Templates 🕨	d:	03-09-2012 14:47:40	
Functional Element:	ServiceNow	Export •	ed:	03-09-2012 15:16:35	
Functional Category:		Assign Label	list:	🖴 🍪	
Assignment group:	ServiceNow 2nd Line Support	Copy URL			
Category:	Information	History ▶ Reload form			
Request State:	Resolved 🗸				
Visibilitv: 🔞	Restricted				

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]

CERN Service Desk - NO REPLY [noreply-service-desk@cern.ch] Barbara Brugger; Isabel Fernandez Gonzalez; Nick Ziogas; Patricia Mendez Lon Reinoud Martens; Nicole Cremel

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: <u>KB0001369</u> - automatic review and extension of the "Next Review" date

Key role of Functional Manager





Knowledge Base Article: KB0000229 / View in tool

This page shows the contents of a Knowledge Base Article. These articles might help you when trying to find a solution to your issue.

Nokia smartphones do not synchronize calendar and mail with Exchange mailbo EXPIRED ARTICLE

KB0000229 - Published on 29 September 2010 Functional Element: E-Mail Infrastructure Tonic: None Visibility: CERN Back to KB articles

Review Date" expiration, otherwise the article will be displayed in the portal with the text "EXPIRED ARTICLE" \rightarrow A full "Review" process must be launched before, or "Next Review date" must be extended

Question Details

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) (<u>KB0001361</u>)
 - ✓ Cannot access a KB article why? (KB0000853)
 - KB articles Link one article to several Functional Elements (FE) or several Service Elements (SE) (<u>KB0001381</u>)
 - ✓ 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

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



Questions ?



Thanks for your attention ! ③

Do you have questions?

Need more demos ?

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