

Capstone Project: Task 4 Solution

Update Knowledge Base

Instruction: Populate the Knowledge Base with a new category that will contain two articles to support internal requesters and fulfillers. Additionally, you will apply company security protocols to ensure information is accessible only to the appropriate parties.

Note: The publishing and retirement processes for a knowledge article are controlled by workflows defined for the knowledge base that the article belongs to. You will enable automatic publishing for the IT Knowledge Base. Refer to **Module 5: Configure Self Service**

A. Enable Automatic Publish

1. Navigate to **All > Knowledge > Administration > Knowledge Bases**.
2. Select the **IT Knowledge Base**.
3. Change the Publish workflow field to **Knowledge – Instant Publish**.
4. Select **Update**.

B. Create a New IT Knowledge Base Category

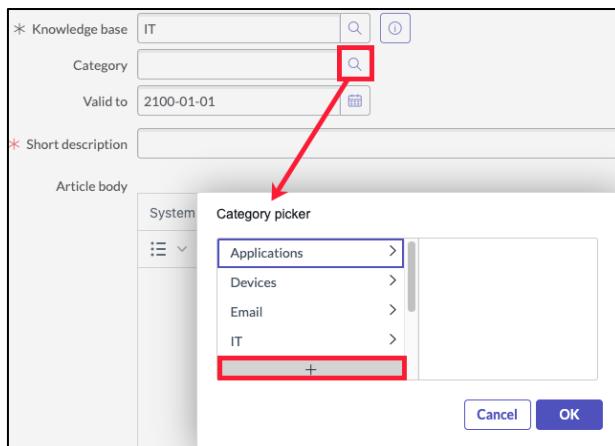
1. Navigate to **All > Knowledge > Articles > Create New**.
2. In the **Knowledge base** field, select **IT**.

The screenshot shows a portion of the ServiceNow interface for creating a new article. It includes fields for Number (KB0010003), Knowledge base (set to 'IT'), Category, and Valid to (2100-01-01). The 'Knowledge base' field is highlighted with a red box.

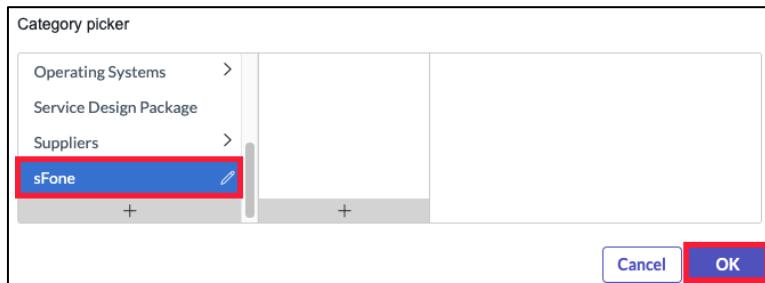
Number	KB0010003
* Knowledge base	IT <input type="button" value="🔍"/>
Category	<input type="button" value="🔍"/>
Valid to	2100-01-01 <input type="button" value="📅"/>

C. Add a new sFone category:

1. Select the **reference icon** next to the **Category** field. The Category picker will appear.
2. Select the **+** that displays at the bottom of the first column in the Category picker



3. Type **sFone**.



4. Select **OK**.

D. Create the Requester Article

Now you will create the first article from this Knowledge Base record.

1. Type a short description: **Requesting an sFone from the Service Catalog**
2. Type the following content into the **Article Body** field:

To request an sFone, navigate to All > Self-Service > Service Catalog. Then, select the Mobile category and locate the Strawberry sFone item. You may also use the Service Catalog search field to locate the item. Select the Strawberry sFone item name to open the ordering screen where you can customize your request. Once satisfied, select Order Now.

3. Right-click the form header, then **Save** the article.

4. Select **Publish**.



Note: No roles were specified, so any user who has access to the IT Knowledge Base will be able to view this article.

E. Create the Fulfiller Article

Create another article to be used by the Strawberry Support group for troubleshooting Service Catalog requests.

1. Navigate to **All > Knowledge > Articles > Create New**.
2. In the Knowledge Base field, select **IT**.
3. In the Category field select **sFone**.
4. Type a short description: **Supporting sFone Service Catalog Requests**.
5. Type the following content into the **Text** field:

If the requester has a question about requesting an sFone, redirect them to the Knowledge Base article: Requesting an sFone from the Service Catalog.

If the requester has placed an order and would like to know about their request, direct them to Employee Center. From Employee Center, they can select My Requests to review the status.

6. Right-click the form header, then **Save** the article.

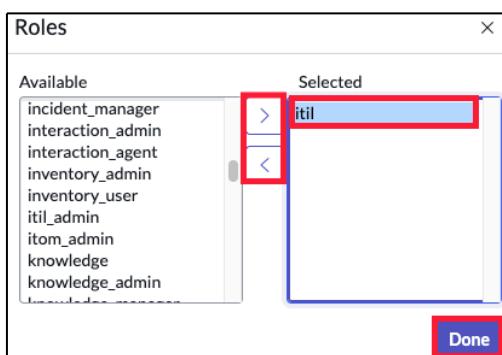
F. Apply Role Security to the Fulfiller Article

1. From the Knowledge Base article record right-click on the form header, then select **Configure > Form Layout**.
2. Add the **Roles** field to the **Selected** column.
3. Place the **Roles** field under **Article type**.
4. Select **Save**.

5. Select the **edit icon** (pencil icon) next to the **Roles** field.

The screenshot shows the 'Edit' screen for a knowledge record. At the top, there are fields for 'Number' (KB0010005), 'Article type' (HTML), and 'Roles'. The 'Roles' field has an edit icon (pencil) highlighted with a red box. Other fields include 'Knowledge base' (IT), 'Category' (sFone), 'Valid to' (2100-01-01), 'Workflow' (Draft), and 'Source Task'. Below these are checkboxes for 'Attachment link' and 'Display attachments'.

6. Add the **itil** role to the Selected column, then select **Done**.



7. Ensure the **itil** role appears under **Roles** in the Knowledge record, then select **Publish**.

The screenshot shows the 'Edit' screen for a knowledge record. The 'Roles' field is highlighted with a red box. Inside the field, the role 'itil' is listed. Above the 'Roles' field are buttons for 'Publish' (highlighted with a red box), 'Retire', and 'Update'. Other fields include 'Article type' (HTML), 'Workflow' (Draft), and 'Source Task'. Below these are checkboxes for 'Attachment link' and 'Display attachments'.

Note: Adding the **itil** role limits who can view the article. In this example, only those users with the **itil** role will see the article. The same result could be accomplished by creating User Criteria. With User Criteria, you would configure the article form to determine who Can Read or Cannot Read the article.

TASK VERIFICATION

1. Navigate to **All > Knowledge > Articles > Published**.
2. Use the **Updated** column to sort the articles in descending order. There are two published articles within the sFone category.



The screenshot shows a ServiceNow knowledge base search results page. The search bar at the top contains 'Knowledge' and 'Number'. The results table has columns: Number, Short description, Author, Category, Workflow, and Updated. Two articles are listed:

Number	Short description	Author	Category	Workflow	Updated
KB0010005	Supporting sFone Service Catalog Requests	System Administrator	sFone		2022-10-13 11:57:39
KB0010003	Requesting an sFone from the Service Cat...	System Administrator	sFone		2022-10-13 11:41:35

Alternative Verification: Rather than search all of the published articles, you may navigate to **Self-Service > Knowledge** and then in the search field for All Knowledge Bases, type **sFone**. Hit the **enter key** and both articles will display.