Update a KBA
At a Glance

Knowledge Management Process

Search for Knowledge → Update Knowledge Article [**Update a KBA**] → Create Knowledge Article → Publish Knowledge Article → Attach Knowledge Article to a Record → Retire Knowledge Article
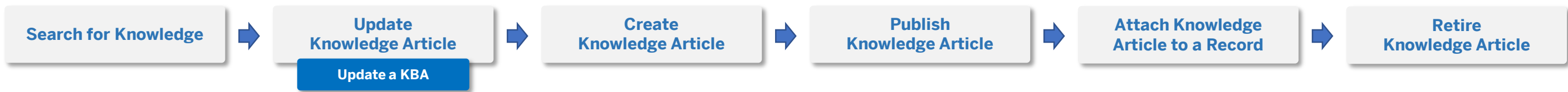
Purpose

Constantly updating outdated and/or incorrect content in the existing KBAs simplifies the Knowledge Base on the whole and improves the readability and reusability of existing KBAs. A KBA left with no change nor update adds none value to solving issues. It is everyone's responsibility to maintain the Knowledge Bases when the knowledge articles are being reused.

All users are assigned with a KM 1 role in ServiceNow that allows them to edit and create KBAs.

When to update a KBA:

- Need to add new symptoms reflecting how the customer asked the question
- Need to add new symptoms or keywords to increase the searchability
- Add additional information to make the KBA more useable
- Hyperlinks or overall formatting of the KBA needs updating
- Content is incorrect

Option A: Update KBA from a record (Agent Workspace & UI16)

1. Update KBA Content

1a Open KBA from the record

1b Update KBA to new version

2. Request for Publishing

2a Confirm and save the changes

2b Request for approval to publish the KBA

Follow WIPS entry: Publish a KBA to complete the publishing process

Option B: Update KBA from Knowledge Management Module (UI16 only)

1. Update KBA Content

1a Open KBA directly from Knowledge Management Module

1b Edit the KBA

1c Update KBA to new version

2. Request for Publishing

2a Confirm and save the changes

2b Request for approval to publish the KBA

Follow WIPS entry: Publish a KBA to complete the publishing process

Notes ⚠️

Best Practices for Editing

If editing from SAP xSearch, the steps outlined in the KM WIKI for KBA – Editing Published KBAs should be followed.

When and how to block KBAs?

If the KBA contains any personal identifiable information or GDPR-violated data, you should immediately remove the violation content and create a new version.

A user with KM 3, KM 3 Coach or KM Compliance role can then block the outdated KBA version that contains the violation.

- Click here to see how to block a KBA.
- The KM roles (levels) and permissions in the system are explained here.

1. Update KBA Content
Knowledge Management

Option A: Update KBA from a record

1a Open KBA from the record (Agent Workspace)

Step 1

Open the sidebar on the right.

Step 2

Click the **Agent Assist icon** within the sidebar to access **Agent Assist**.

Agent Assist now appears in right hand sidebar.

Step 3

Click the **3-dot menu icon (...)** in the top-right corner to open the UI action list of the knowledge article you'd like to update.

Step 4

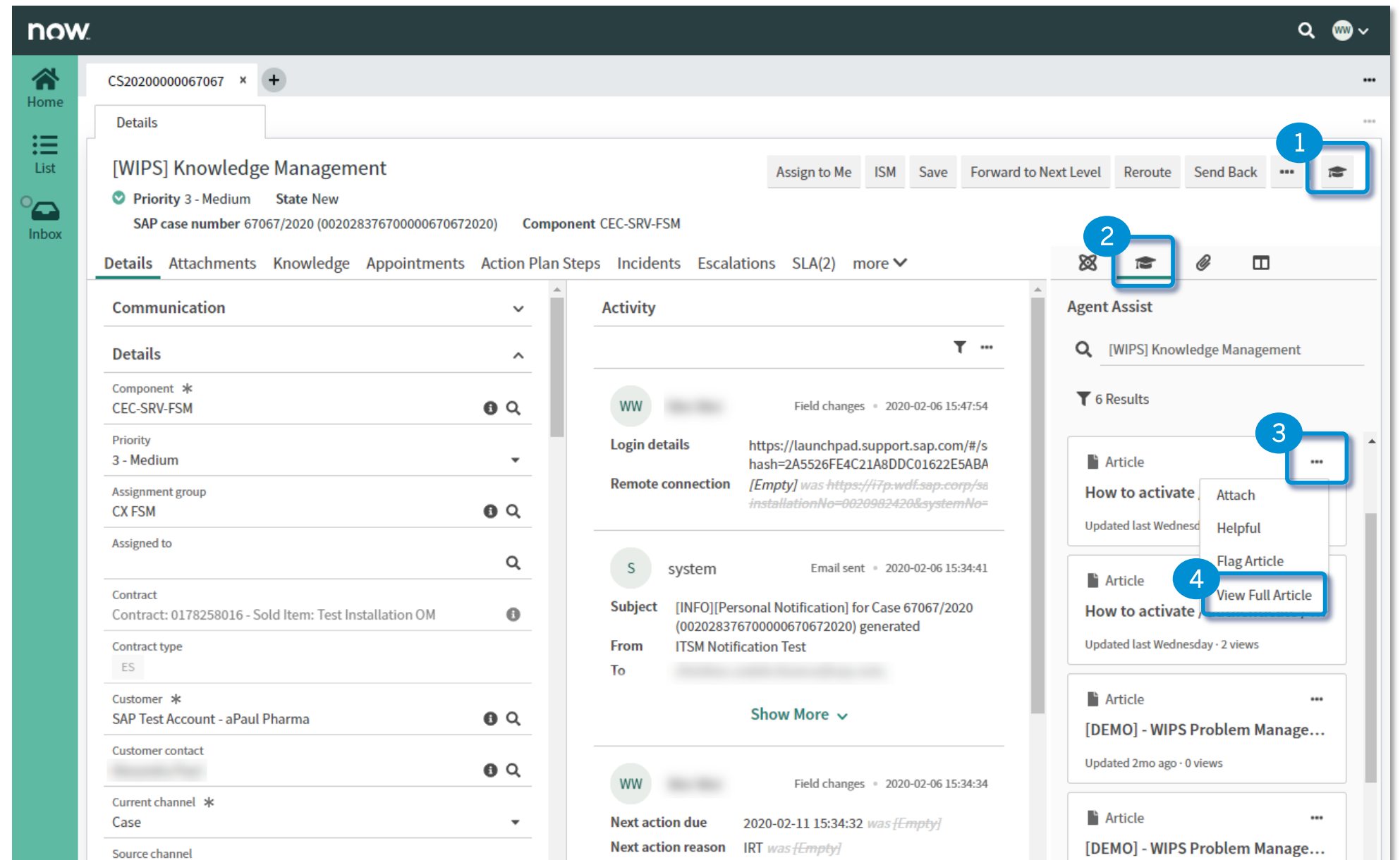Select **View Full Article**. A window opens with the KBA article.

⚠ Notes

View full article to access the Edit button

You can update a KBA from a record (e.g. Case, Incident, Problem) by first viewing the full article. Once the article is displayed, the **Edit** button will also be displayed on the KBA record.

See the WIPS entry: Search for Knowledge for information on accessing knowledge article from within a record (e.g. Case).

You can also search for and open a KBA directly from the KBA list in UI16. However this functionality is NOT available in Agent Workspace.

1. Update KBA Content
Knowledge Management

Option A: Update KBA from a record

1a Open KBA from the record (UI16)

Step 1

Go to **Initial Description** tab.

Step 2

Click **Related Search Results** to open the search result list.

Step 3

Click the **hyperlinked title** of the KBA that you'd like to update. A window pops open with the KBA article.

In UI16, it is possible to differentiate between KBAs and KEAs in the search result. All KBAs are identifiable as Knowledge under its title (see highlight in yellow), while all KEAs are identifiable as Known Errors.

Notes ⚠

View full article to access the Edit button

You can update a KBA from a record (e.g. Case, Incident, Problem) by first viewing the full article. Once the article is displayed, the **Edit** button will also be displayed on the KBA record.

See the WIPS entry: Search for Knowledge for information on accessing knowledge article from within a record (e.g. Case).

You can also search for and open a KBA directly from the KBA list in UI16. However this functionality is NOT available in Agent Workspace.
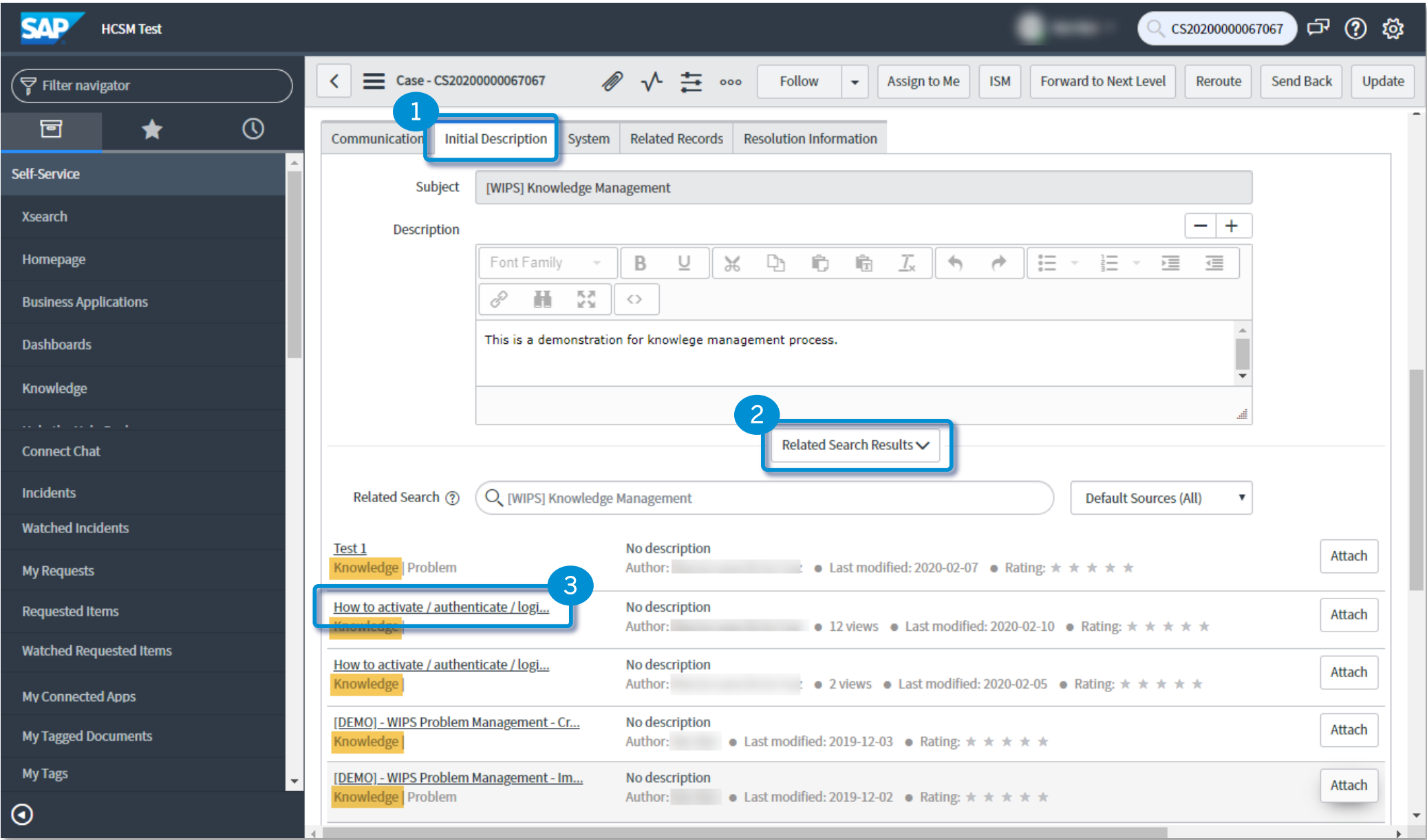
1. Update KBA Content
Knowledge Management

Option A: Update KBA from a record

1b Update KBA to new version

ServiceNow Knowledge Management allows for the published KBA to remain available to customers while a new version is created with needed updates.

Step 1

Click **Edit** in the top right corner to switch to editing mode.

- If the KBA is published, you have the options to retire or create new version of the KBA.

- If the KBA is unpublished, you can make update and request the KBA to be published.

Step 2

Once in the editing mode, click **New Version** button in the top right corner to create a new version of KBA with **Release Status** of **Draft**.

- The previous version remains available to customers (if published externally) until the new KBA version is published.

- The new version can be deleted before it is published.

- Only one draft version of a KBA can be created. However multiple users can update that draft version.

Step 3

Make updates to the KBA as needed.

You may follow the WIPS entry: Create a KBA for information on each of the KBA fields if necessary.

For all updates made to a KBA, ensure the following standards and guidelines are followed:
- KBA Content Standards
- Data Protection Guidelines

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①

| ‹ ★ | Home / Problem | Subscribed | Edit **①** |

How to activate / authenticate / login on SuccessFactors App?

KB0012365
3 views

Number	SAP KBA#
KB0012365	0005000642

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②

‹ ☰ Knowledge Article - KB0012365 v1.0 📎 ∿ ⇄ ∘∘∘ **New Version ②** Retire Update

Number	KB0012365		SAP KBA#	0005000642
✳ Responsible		🔍 ⓘ	✳ Processor	🔍 ⓘ
✳ Target	Release internally		Release Status	Published
Version	1.0	ⓘ	Expires on	2025-02-10 📅
✳ Category	Problem		Bridge KBA	No
✳ Component	LOD-SF-FWK	🔍 ⓘ	Product	🔒
Other Components	🔒		Product Version	

Best Practices ⚠

Data Protection and Security

- General Data Protection Regulation (GDPR) is the regulation that enforces the Data Protection and Security law.

- **Screenshots** from customer systems are NOT allowed in any Knowledge Management documentation.

- These regulations apply to all KBAs regardless of the KBA status.

- Do not display or disclose personally identifiable information (PII) or any other confidential information or information about our internal SAP servers in any part of the KBA (including screenshots, attachments, videos).

- Refer to the Data Protection and Privacy (DPP) page for further descriptions and guidelines on what personal data is.

Click here for more details and for steps on how to report a violation.

If the KBA contains a Data Protection / GDPR Violation, you should immediately create a new version and remove the violation content. A user with KM 3, KM 3 Coach or KM Compliance role can then block the older outdated KBA version that contains the violation.

Click here to see how to block a KBA.

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2. Request for Publishing
Knowledge Management

Option A: Update KBA from a record

2a Confirm and save the changes

2b Request for approval to publish the KBA

Step 1

Click **Update** in the top right corner to save the changes once you finish making updates to the KBA.

Step 2

Click **Publish** in the top-right corner of the KBA.

This updates the Release Status of the KBA to **Review**.

If you'd like to make changes while keeping the status as Review, directly click **Update** button once all changes are made.

Knowledge Article - KB0012365 v1.01

Publish ② Update ① Search for Duplicates Delete

ⓘ A new version of the article is created for revision. ✕

Number	KB0012365	SAP KBA#	0005000642
✱ Responsible		✱ Processor	
✱ Target	Release internally ▼	Release Status	Draft
Version	1.01	Expires on	2025-02-10
✱ Category	Problem ▼	Bridge KBA	No ▼
✱ Component	LOD-SF-FWK	Product	🔒

Notes ⚠

For all updates made to a KBA, ensure that the following standards are followed:
- KBA Content Standards
- Data Protection Guidelines

After a KBA has been updated, you need to click **Publish** in order to send the approval request to the predefined approver and set the Release Status of the KEA to **Review**. The KBA's Release Status remains as Draft if you only click **Update**.

The KBA will then need to be approved, regardless of the KM roles of processor.

How to recall KBA under review back to draft?

If you'd like to revert the Release Status of the KBA from Review back to Draft:

1. Click **Recall** in the KBA record with Review status. This revert the status of the KBA back to Draft.
2. Make changes and then click **Update** to save those changes.

Note:
This does not publish the KBA. Click **Publish** again to send the KEA to review status for publishing.

Knowledge Article - KB0012365 v1.02

Recall ① Update ② Search for Duplicates

Number	KB0012365	SAP KBA#	0005000642
✱ Responsible		✱ Processor	
✱ Target	Release internally ▼	Release Status	Review
Version	1.02	Expires on	2025-02-10

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1. Update KBA Content
2. Request for Publishing
Knowledge Management

Option B: Update KBA from Knowledge Management Module

Step 1

Go to UI 16 https://itsm.services.sap/ and open the **Knowledge Module** in the **Application Navigator**.

Step 2

Click **All** to see the list for ALL KBAs (or if you know it's Published, Unpublished, Retired, select the corresponding menu item)

Step 3

You may use the search functionality for the column and search for **Knowledge** as the **Knowledge base**.

Alternatively, right-click the mouse next to the **Knowledge** in the **Knowledge base** column and select **Show Matching** to filter for all knowledge articles saved in the Knowledge Database (i.e. KBAs).

Step 4

Click the **hyperlinked title** of the KEA you'd like to edit. The KEA is opened in the editing mode.

Follow the steps here to Update the KBA and Request for Publishing.

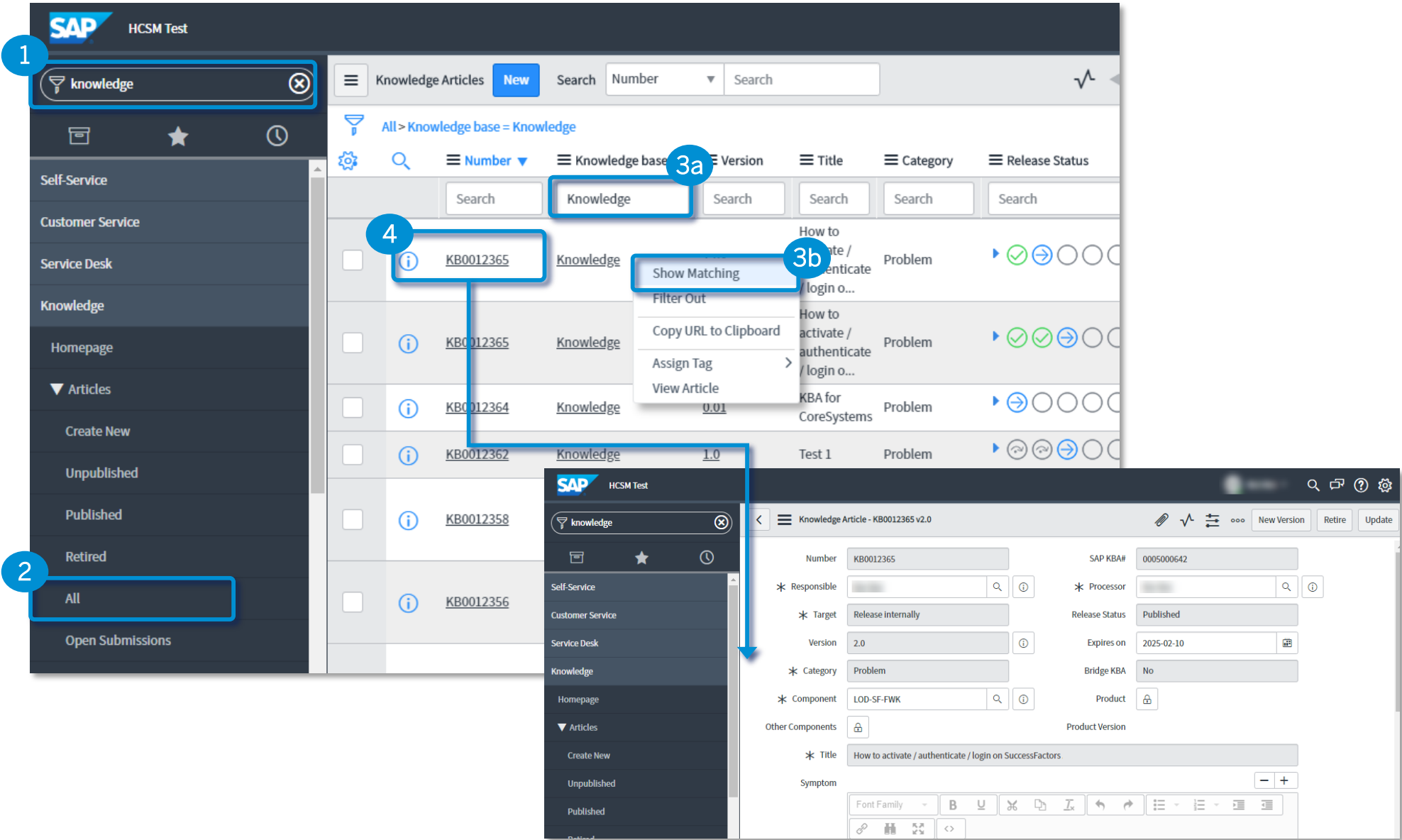### ⚠ Notes

When to edit KBA from Knowledge Module directly?

If you need to edit a KBA, but do not have a related record, or do not want to edit from a related record, you can edit a KBA from the KBA lists in UI16.

UI16 offers greater Knowledge Management functionalities and makes it easier to list, filter and search KBAs based on any number of criteria.

Change Log
Knowledge Management – Update a KBA

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Carly Thomas	Nov 25, 2019	▪ WIPS 4.0 Golden Standard Baseline Documents	Published
1.1.0	Wei Wei	Mar 02, 2020	▪ Removed Block a KBA to individual slide deck ▪ KBAs are stored in Knowledge database and identifiable as Knowledge in UI16 result display	Published