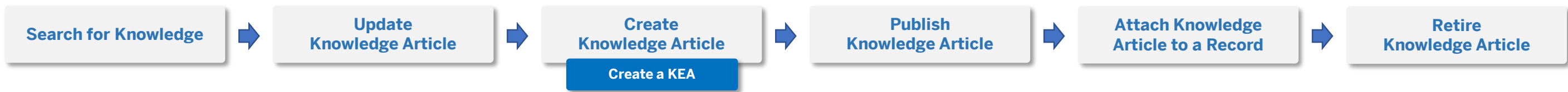


Create a KEA

At a Glance



Knowledge Management Process



Purpose

Known Error Articles (KEAs) are created to:

- Document potential root cause and repeatable workaround;
- Avoid unnecessary and duplicate work for reported issue;
- Request for publishing the KEAs in a timely and structured approach.

When can you create a KEA?

Users can create a KEA during the follow phases of the Problem Management process:

- New (when the Problem record is newly created)
- Assess (when the issue reported in the Problem is under assessment for validity of further investigation)
- Root Cause Analysis (when the root cause of the reported issue is being investigated)

1. Search for KEAs

Follow [WIPS entry: Search for Knowledge](#) to perform comprehensive search before creating any new content

2. Collect Information

2a Prepare description of the issue

2b Gather more information and details of the KEA (e.g. possible root cause, workarounds, etc.)

3. Create KEA Record

3a Open new KEA form in Agent Workspace

Important Note:

- KEA can only be created from a Problem record.
- It is recommended to create KEA using Agent Workspace since most likely the Problem record is being processed in Agent Workspace.
- Click [here](#) to see how to open new KEA form in UI16.

4. Fill in KEA Information

4a Fill in the applicable fields in the KEA form

- [Header](#)
- [Status details](#)
- [Main body content](#)
- Other fields:
 - [Expires on](#)
 - [KEA Attachments](#)
 - [KEA Tags \(only in UI16\)](#)

Click [here](#) to see how to fill in locked KEA fields in UI16.

5. Request for Publishing

5a Send the KEA for review and request for publishing approval

See [WIPS entry: Publish a KEA](#) for detailed explanation of how to publish the KEA.

Notes



Always SEARCH before creating any new KEA

It is important to **search early and search often** to avoid creating duplicate KEAs.

Who can create KEAs?

All users are assigned at least KM 1 permission in ServiceNow that allows them to create KEAs.

The KM permissions in the system are explained [here](#).

3. Create KEA Record

Knowledge Management

3a Open new KEA form in Agent Workspace

Step 1

Click the **3-dot menu icon (...)** in the top-right corner of the Problem record to expand the UI action list.

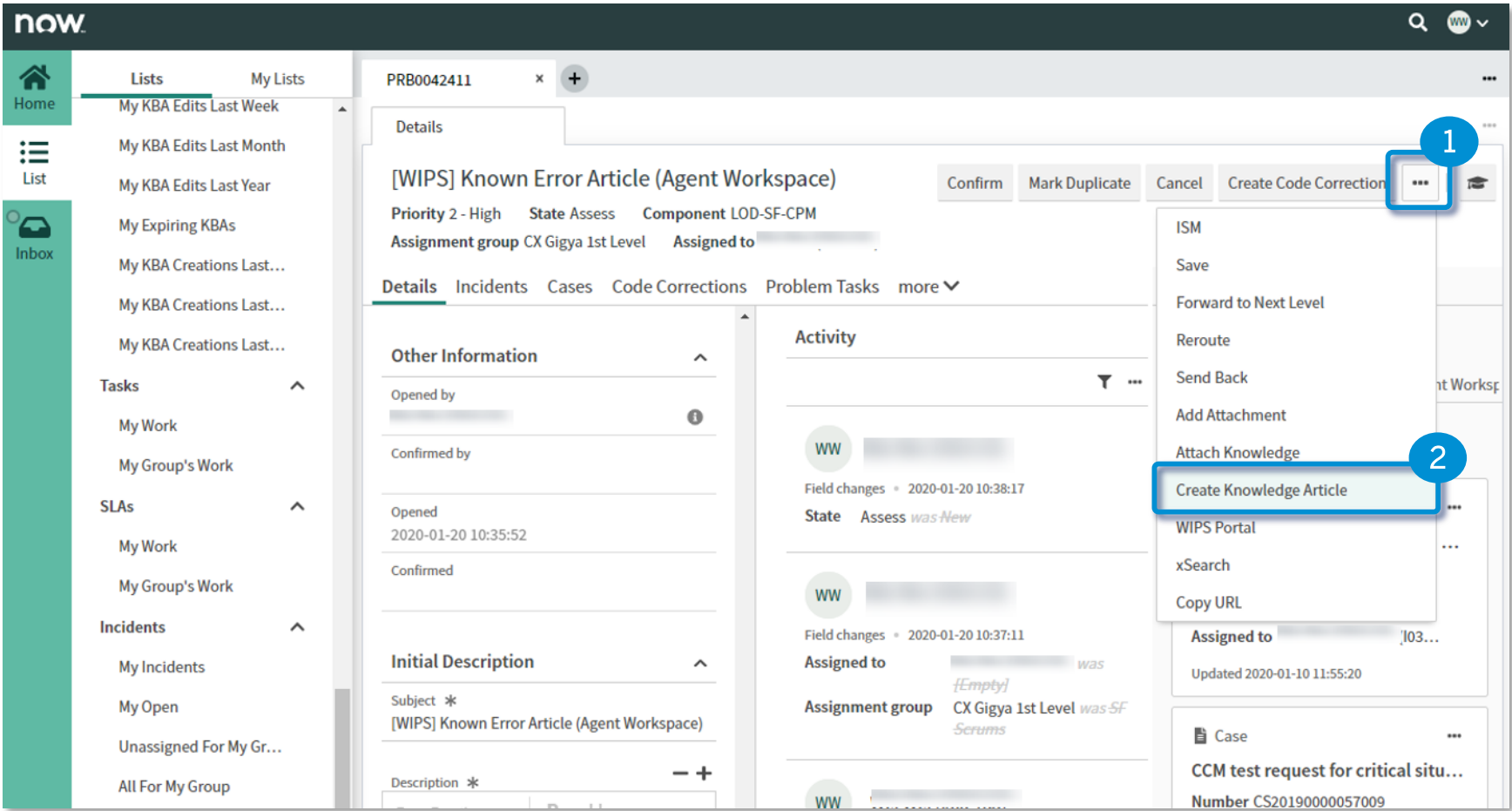
Step 2

Select **Create Knowledge Article** to open a new KEA creation form. The form opens in the new tab.

Notes: The following fields are auto-populated based on information from the related Problem when creating KEA from the Problem record:

- Responsible (default as your name)
- Target (default as Release internally)
- Category (set as Known Error and read-only)
- Component (replicated)
- Related Record (read-only)
- Processor (default as your name)
- Release Status (set as Draft and read-Only)
- Expires on (default as 5 years)
- Product (editable)
- Product Version (editable)
- Title (replicated)

See the section [Fill in KEA Information](#) for more information on KEA form field.



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 KEAs regardless of the KEA 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 KEA (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.

Header & Status Details

It is important that the Header Data section is filled out correctly because it is used by customers to narrow down their search results and it is used in the internally to run queries. Mandatory fields (marked by red asterisk *****) must be completed before the KEA can be saved. This slide explains the key KEA header & status fields and how to populate them.

KEA Header Data

- a. **Number, SAP KBA#, Related Record, Version:** auto-populated by ServiceNow and read-only.
- b. **Responsible *** : When creating a KEA, it will be populated with your name automatically. Change this by clicking the magnifying glass if you would like to have someone else be responsible for the KEA (e.g. the person that created the KEA is no longer at SAP or moved to a different area).
- c. **Processor *** : This field is populated with your name automatically when creating the KEA. It is the user that is assigned to execute specific action for this KEA. The processor can be the KM Coach to review and publish the Knowledge Article, or the author/editor if no KM Coach is required to review and publish.
- d. **Component *** : It is important to choose all the correct component(s) that the KEA applies to. Click the magnifying glass to search from a list, or free form type in the component name. More than one component may be added in the **Other Components** field. This is important to simplify the knowledge search.
- e. **Category *** : This field is auto-populated by ServiceNow as **Known Error** and is read-only.
- f. **Expires on:** Optional field that can be used to remind you that a KEA should be updated or archived on a specific date. If you do not change or remove this date, the system will archive the article 5 years from the creation date. [See Fill in KEA Information - Expires on section](#) for more information.
- g. **Product:** It's important to choose all product(s) that the KEA applies to. Start typing the product name and select from the list. Multiple products can be added. Product versions can also be added to the **Product Version** field.

Notes

⚠

How to select the right product(s) and product version(s)?

- Add ALL product(s) to which the KEA applies;
- If the KEA applies to specific product version(s), select the one(s) to which the KEA applies;
- If the KEA can apply to all versions, DO NOT select any version;
- Leave the field blank for generic KEAs not assigned to specific SAP products or versions

What product(s) and product version(s) can a KEA valid for?

- All versions of a product up to the current version;
- A product, no versions specified (all current, previous and future versions);
- One or more product versions;
- Not restricted to any product or version (generic KEA).

PRB0042839 × +

DetailsNew Known Error ... ×

Create New Known Error Article

Save ...

Details

Known Error Article

Number
KB0012265

SAP KBA#

Responsible *
[Name]

Processor *
[Name]

Target *
Release internally

Release Status
Draft

Version

Expires on
2025-01-27

Category *
Known Error

Product

Component *
LOD-SF-CPM

Product Version

Other Components

Related Record
PRB0042839

Activity

No activity to display

Activity will be displayed after the record is created.

Header & Status Details

It is important that the Header Data section is filled out correctly because it is used by customers to narrow down their search results and it is used in the internally to run queries. Mandatory fields (marked by red asterisk *****) must be completed before the KEA can be saved. This slide explains the key KEA header & status fields and how to populate them.

KEA Status Fields

- h.

Release Status:

This field displays the workflow progression of the KEA. It is auto-populated and read-only.
 - Draft:** The initial status of a newly-created KEA or one that is being fixed/edited. It represents work in progress. The author can click **Save** to keep working on it in the future. It remains in the author’s KEA Inbox. A KEA is also set to **Draft** if it is sent back to be modified after it has been reviewed.**Important:** NEVER leave the **Processor** field blank.
 - Review:** The KEA is considered completed by the author. This status is used when submitting a KEA to a KM Coach for review. It is also used by KM Coaches to publish both their own and others' KEAs and by KM 2s (internal KEAs only) and KM 3s before they publish their own KEAs.
 - Published:** The KEA is approved for publishing and is accessible to the defined target group of either internal users or external customers.
 - Pending Retirement:** The KEA has been requested for retirement and the approval request is generated automatically for retiring the KEA. KEAs with release status of Pending Retirement are not viewable by other users or customers anymore.
 - Retired:** The KEA has been successfully retired and cannot be retrieved or republished. It is also impossible to edit a retired KEA including blocking GDPR-violated versions.
 - Outdated:** This status can only be used after a KEA has been published. This status should only be used when a KEA is no longer relevant. See **WIPS entry: Update a KEA** for more details about when this status can be used.
- i.

Target:

This field sets the target audience of the KEA.
 - Released Internally:** The KEA is approved for internal use by other engineers. Either the KEA requires more validation before being published for use by customers, or the KEA contains proprietary information that is not appropriate for the customer to have access to.
 - Released to Customer:** The KEA is approved for use by customers.

PRB0042839 x + ...

DetailsNew Known Error ... x ...

Create New Known Error Article

Save ...

Details

Known Error Article

NumberKB0012265SAP KBA#

Responsible *

Target *Release internally

Version

Category *Known Error

Component *LOD-SF-CPM

Other Components

Related RecordPRB0042839

Processor *

Release StatusDraft

Expires on2025-01-27

Product

Product Version

Activity

No activity to display

Activity will be displayed after the record is created.

Knowledge Management

Main Body Content

It is important that the main body content is documented correctly to provide the accurate and latest knowledge information. Some sections are optional for the content creation.

Mandatory fields (marked by red asterisk *****) must be completed before the KEA can be saved.

KEA Main Body

- **Title *** : Short description of the KEA Topic.
- **Symptom *** : Describe the issue/question in a concise and clear way using the most important details. It is recommended to use how the customer describes the issue.
- **Environment** (highly recommended): Add environment information to help classify the issue (e.g. when the issue applies to a specific operating system, feature, function).
- **Reproducing the Issue**: When the information is known, provide the exact steps (workflow) that reproduces the issue (problem). Use a numbered list when providing the exact steps.
- **Cause** (optional): When the information is known, state the potential underlying cause in the clear and understandable way to help others understand why issues (problems) occur.
- **Workaround *** : The workaround provided should be explained in the clear way so that this information can be shared with all parties involved to temporarily solve the issue. By following these clearly stated actions, the symptom(s) should disappear after the workaround has been applied.
- **See Also** (optional): This area can be used to add additional information such as helpful references or useful links.
- **Keywords** (highly recommended): Keywords can help a KEA be more searchable. Examples are words that maybe used to search on (e.g. BOE, ASE), commonly misspelled words, CR number, etc.

Other information

- **Internal Memo:** This field can be used to add any internal comment or note to provide additional information to the internal employees accessing this KEA. Information posted here is not displayed in the published KEA.
- **Updated by** (auto-populated): This field Indicates who has performed the last update on the Knowledge Article. This can be a user ID, API, or system, etc. and does not limit to updates performed in ServiceNow only.
- **Redirect Link** (auto-populated): It is the hyperlink for the KEA that has been either replicated into i7 system from ServiceNow.

THE BEST RUN

Other Fields

The KEA Form consists of several other fields that help manage the KEA content and reporting. See below on when and how these fields should be used.

Expires on – When to use it?

The **Expires on** field is an optional field that can be used to remind you that a KEA should be updated or archived on a specific date.

Note: This field is automatically populated 5 years from creation date. However the default date can be removed.

Expires on – How does it work?

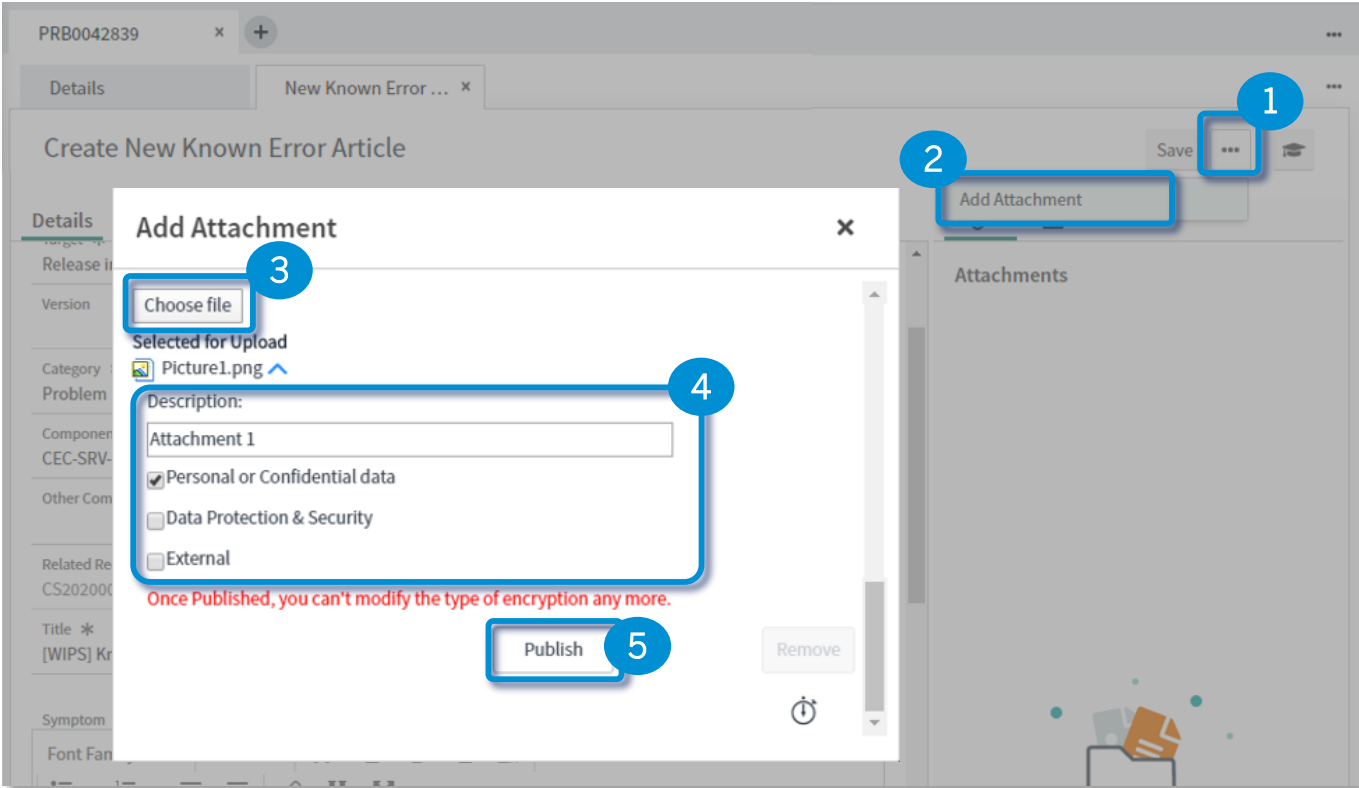
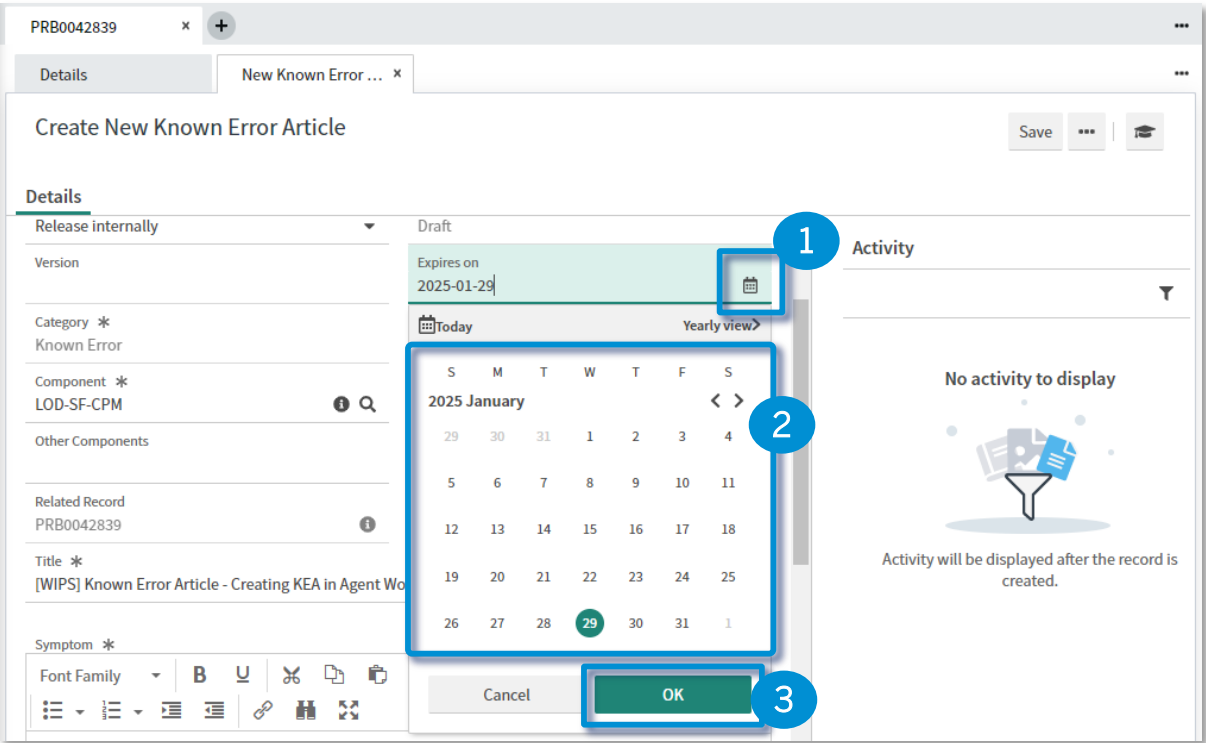
- Email notifications will be sent from the system to the name displayed in the **Responsible** field as a reminder to update or archive the KEA.
- Email notification will be sent at these intervals: 4 weeks, 2 weeks, 3 days, and the day when the KEA expires or until the KEA is updated and the **Expires on** date has been changed/removed.
- If the **Expires on** date is met, the system automatically changes the KEA status to **Retired**.

KEA Attachments

Attachments can be added to KEAs to provide supporting details to the KEA.

Due to General Data Protection Regulation (GDPR), do not display/disclose any information regarding customer data or internal SAP servers in any KEA content (e.g. attachment/screenshot/video added to the KEA, description of error messages, symptoms, etc.).

- Click the **3-dot icon (...)** to expand the UI action list.
- Click **Add Attachment** to open the attachments window.
- Click **Choose file** and browse for file that is going to be uploaded as attachment.
- Once selecting the file, check the data sensitivity box(es) that applies to this attachment for GDPR compliance.
- Click **Publish** to attach the file(s) to the KEA. You may also delete the attachment by clicking **Remove**.
- Once attached, the attachments are displayed in the **Activity** stream as well as in the **Attachment** tab in the sidebar.



5. Request for Publishing Knowledge Management

5a Send the KEA for review and request for publishing approval

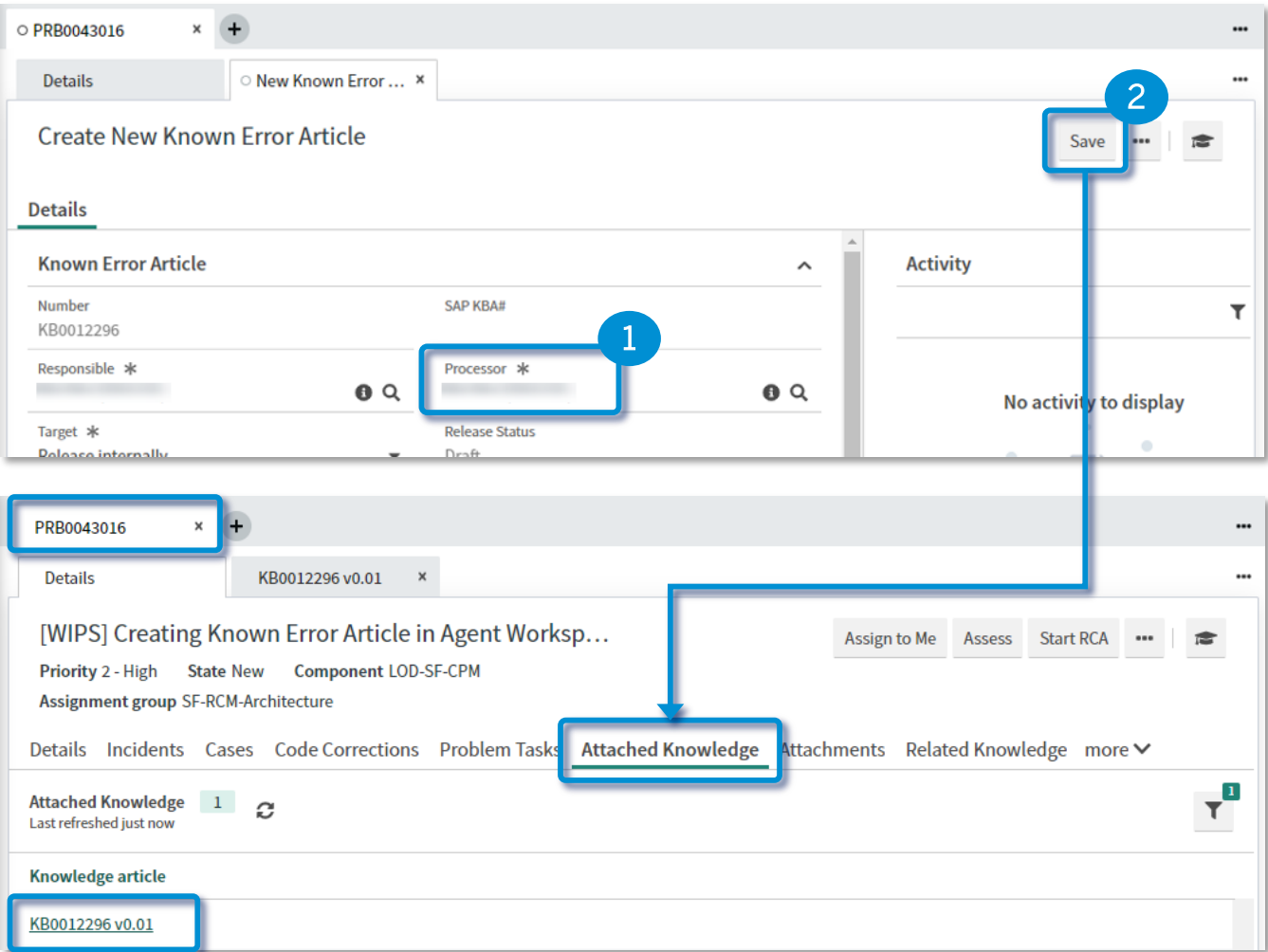
Step 1

Assign your KM Coach to **Processor** field for the approval. If you are allowed to publish your own KEA, assign yourself to the **Processor** field.

Step 2

Click **Save** to save all changes made to the KEA record.

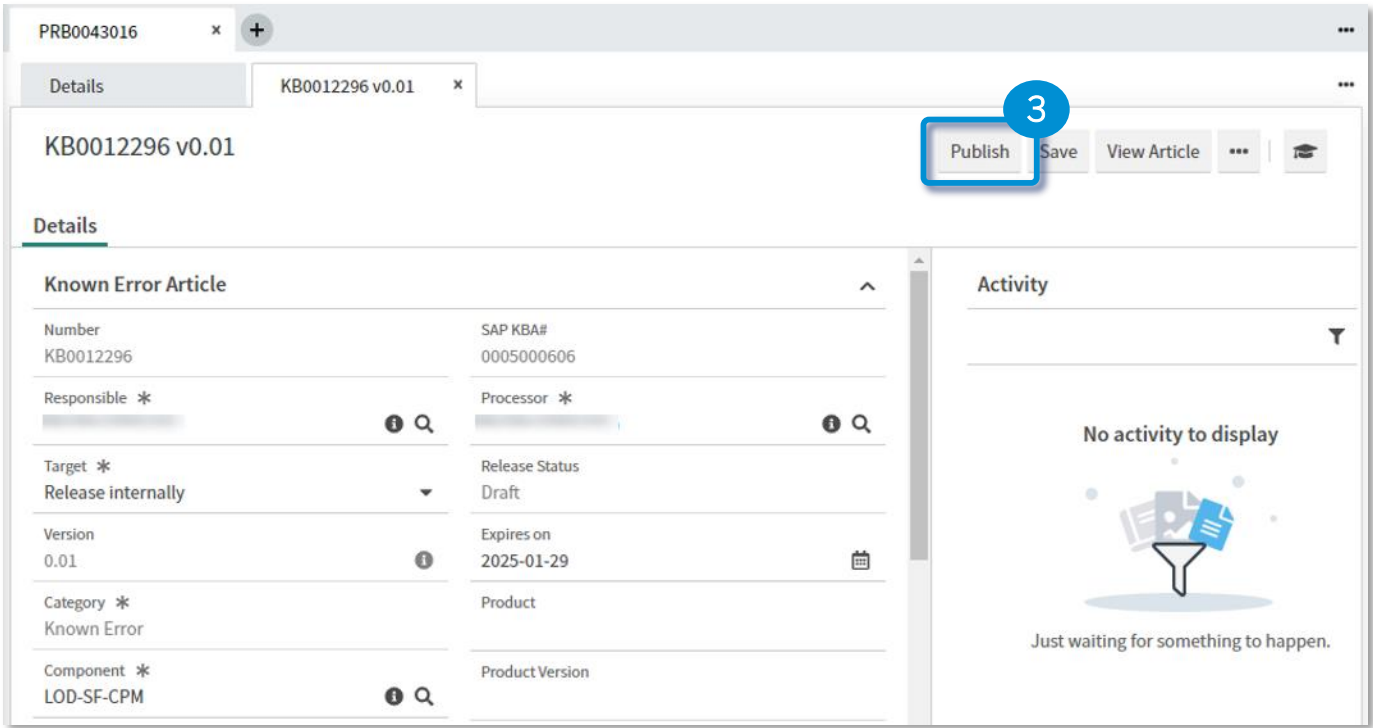
The KEA will be saved as a draft and attached to the parent record (i.e. the Problem record) in the **Attached Knowledge** tab. If it's not shown, refresh the record or the page.



Step 3

Once the KEA is saved, click **Publish** to send the KEA draft for review.

This changes the **Release Status** from **Draft** to **Review**. Follow [WIPS entry: Publish a KEA](#) to publish the article if you have the correct roles and permission.



How to create KEA in UI16?

Knowledge Management

How to open a new KEA form from Problem record in UI16?

Although it is recommended to create KEA from Problem record using Agent Workspace since most likely the Problem is being processed in Agent Workspace, it is also possible to create a KEA using UI16.

Step 1

Click the **hamburger menu icon** in the top-left corner of the Problem record to expand the context menu list.

Alternatively, move your mouse to the title bar and right-click your mouse.

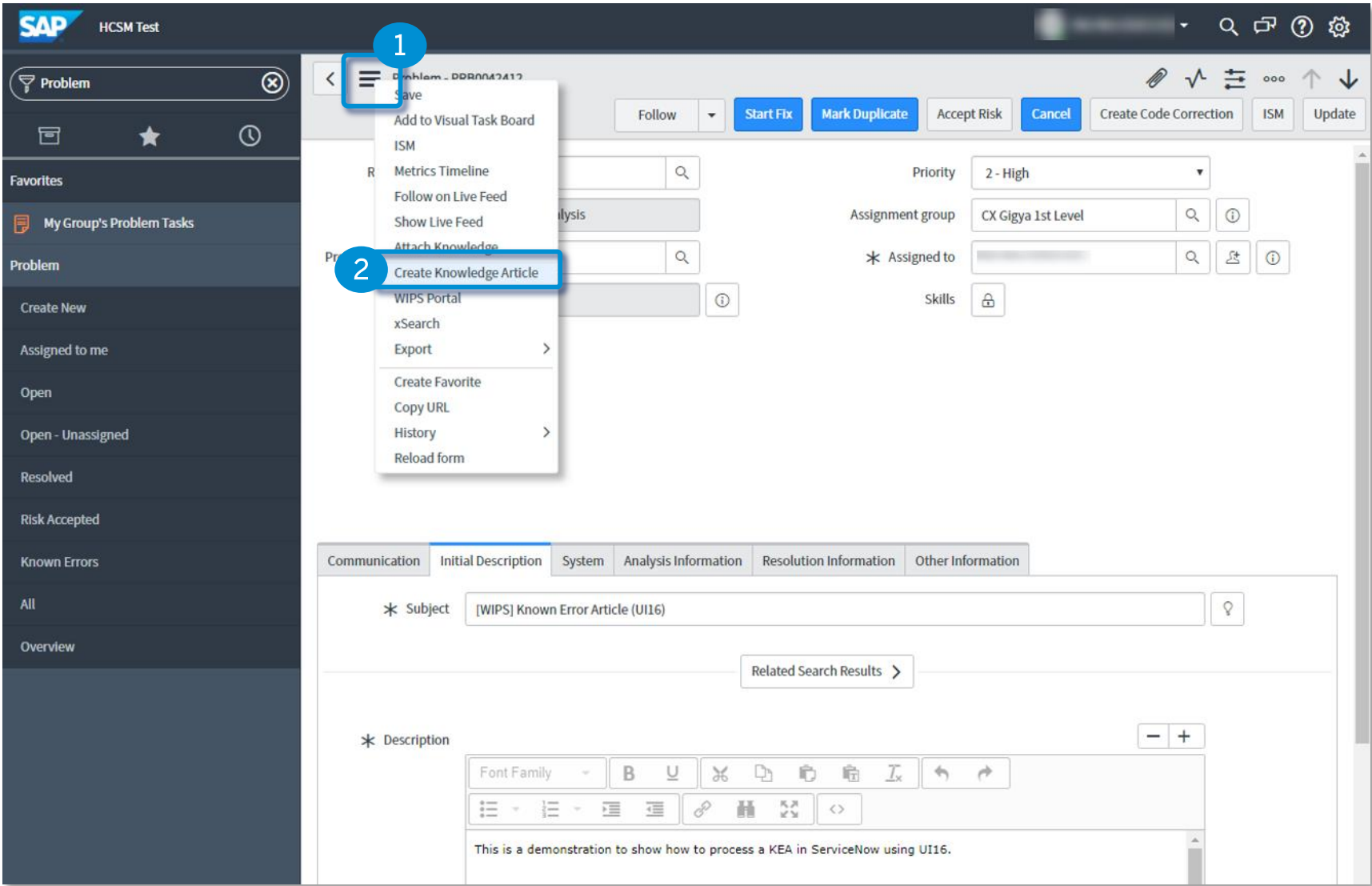
Step 2

Select **Create Knowledge Article** to open a new KEA creation form. The form opens in the new tab.

Notes: The following fields are auto-populated based on information from the related Problem record:

- Responsible (default as your name)
- Target (default as Release internally)
- Category (set as Known Error and read-only)
- Component (replicated)
- Related Record (read-only)
- Processor (default as your name)
- Release Status (set as Draft and read-Only)
- Expires on (default as 5 years)
- Product (editable)
- Product Version (editable)
- Title (replicated)

See the section [Fill in KEA Information](#) for more information on KEA form field.



Notes

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 KEAs regardless of the KEA 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 KEA (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.

How to create KEA in UI16?

Knowledge Management

How to fill in KEA information in UI16?

Detailed explanations for each of the fields in the KEA can be found [here](#).

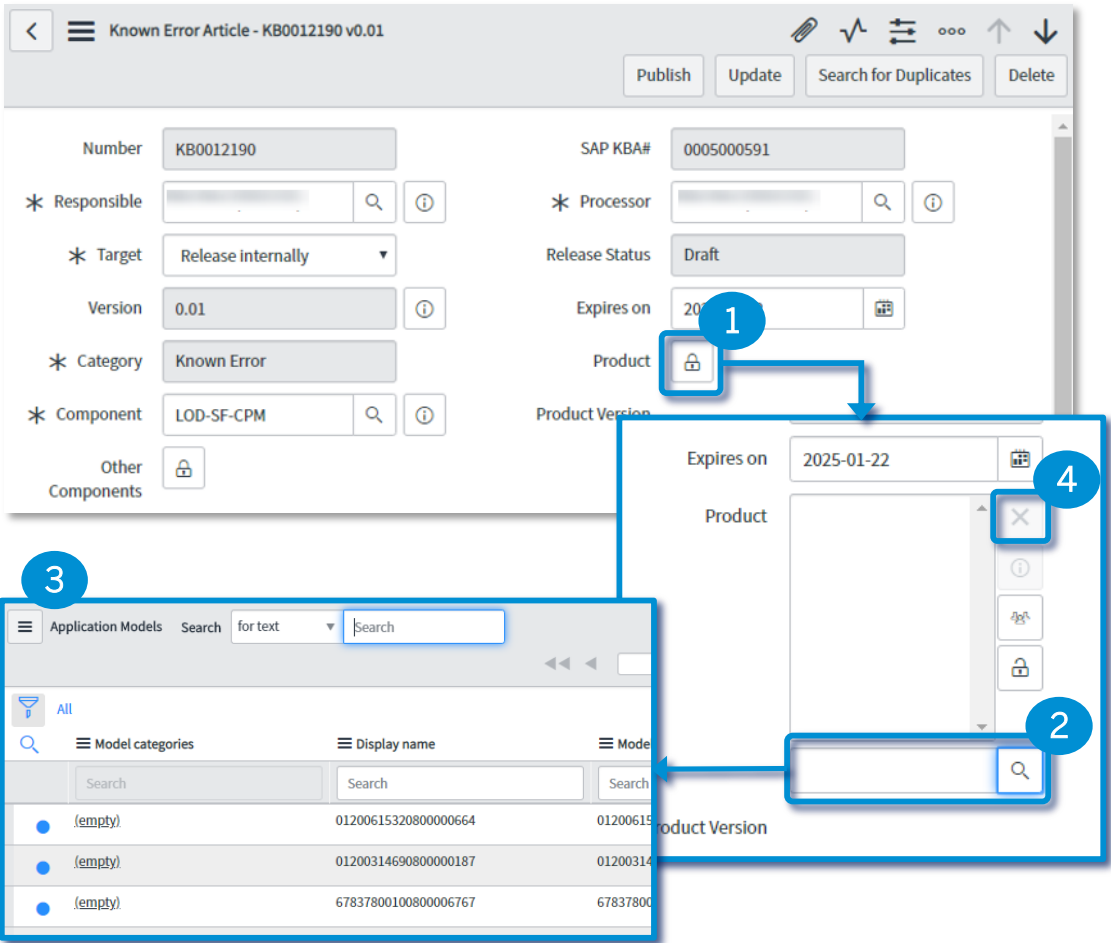
The following slides focus on explaining the unique functionalities related to creating KEA in UI16.

How to unlock and edit the locked field?

The KEA form has several fields in that are locked for editing by default in ServiceNow UI16. These are **Other Components**, **Product**, and **Product Version**.

1. Click the **lock icon** next to the field to activate the field.
2. Click the **Magnifying Glass** to display the search window for products, or type in the text field to the left of the **Magnifying Glass** for suggested selections.
3. Search for all input(s) that are applicable to this KEA.
4. Click **X** to delete any selection that has been added to the list, if necessary.

Once all selections are chosen, you may either click the lock icon again to close the field or you may simply leave it as it is and all information will be saved automatically when updating the KEA form.



How to fill in KEA information in UI16?

Detailed explanations for each of the fields in the KEA can be found [here](#).

Expires on – When to use it?

The **Expires on** field is an optional field that can be used to remind you that a KEA should be updated or archived on a specific date.

Note: This field is automatically populated 5 years from creation date. However the default date can be removed.

Expires on – How does it work?

- Email notifications will be sent from the system to the name displayed in the **Responsible** field as a reminder to update or archive the KEA.
- Email notification will be sent at these intervals: 4 weeks, 2 weeks, 3 days, and the day when the KEA expires or until the KEA is updated and the **Expires on** date has been changed/removed.
- If the **Expires on** date is met, the system automatically changes the KEA status to **Retired**.

Known Error Article - KB0012190 v2.0

Manage Attachments (3): [Recommendation Area in Case.png](#) [view] [Recommendation Area in Case.png](#) [view] [Recommendation ...](#)

Number: KB0012190

SAP KBA#: 0005000591

* Responsible: [Search]

* Processor: [Search]

* Target: Release internally

Release Status: Published

Version: 2.0

* Category: Known Error

* Component: LOD-SF-CPM

Other Components: [Lock]

Related Record: PRB0042412

* Title: [WIPS] Known Error Article (UI16)

Expires on: 2025-01-22

Product Version: << January 2025 >>

Calendar: S M T W T F S

29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31 1

2 3 4 5 6 7 8

Go to Today

KEA Attachments

Attachments can be added to KEAs to provide supporting details to the KEA.

Due to General Data Protection Regulation (GDPR), do not display/disclose any information regarding customer data or internal SAP servers in any KEA content (e.g. attachment/screenshot/video added to the KEA, description of error messages, symptoms, etc.).

- Click the **Attachment icon** (on the top-right corner of the KEA form to open the attachments window).
- Click **Choose file** and browse for file that is going to be uploaded as attachment.
- Once selecting the file, check the data sensitivity box(es) that applies to this attachment for GDPR compliance.
- Click **Publish** to attach the file(s) to the KEA. You may also delete the attachment by clicking **Remove**.
- Once attached, the attachments are displayed at the top of the KEA form in the editing mode.

Known Error Article - KB0012190 v2.0

Number: KB0012190

SAP KBA#: 0005000591

* Responsible: [Search]

* Target: Release internally

Version: 2.0

* Category: Known Error

* Component: LOD-SF-CPM

Other Components: [Lock]

Related Record: PRB0042412

* Title: [WIPS] Known Error Article (UI16)

Expires on: 2025-01-22

Product Version: << January 2025 >>

Calendar: S M T W T F S

29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31 1

2 3 4 5 6 7 8

Go to Today

Attachments

Choose file

Selected for Upload

Capture.PNG

☒ Personal or Confidential data

☒ Data Protection & Security

☐ External

Once Published, you can't modify the type of encryption any more

Publish

Remove

How to create KEA in UI16?

Knowledge Management

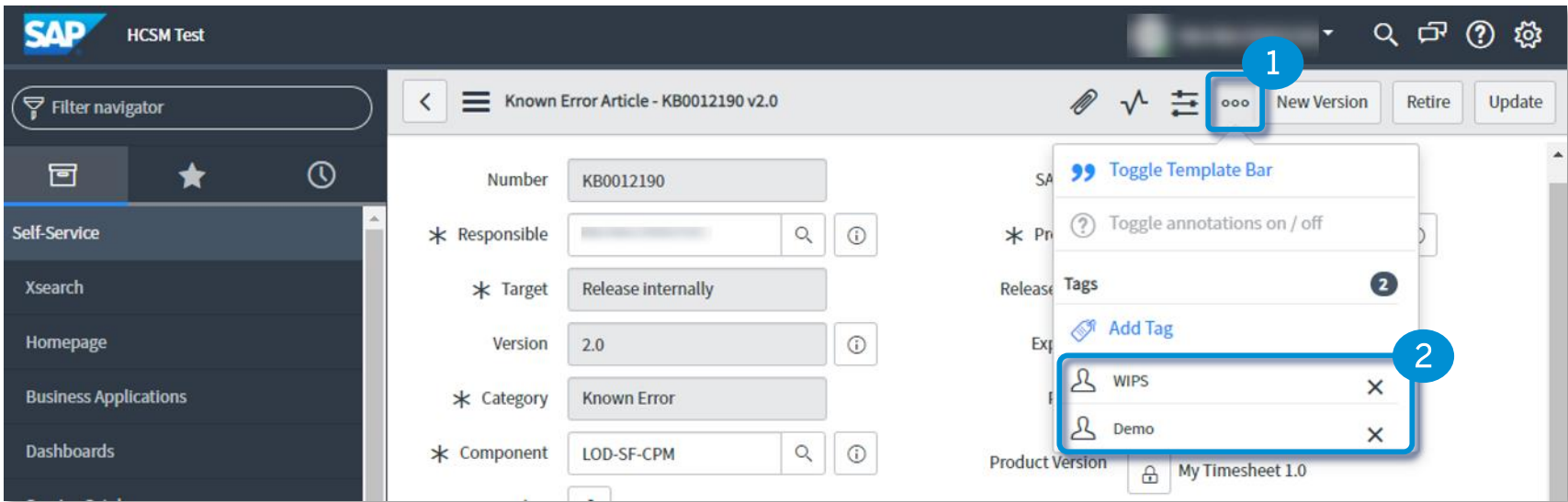
How to fill in KEA information in UI16?

Detailed explanations for each of the fields in the KEA can be found [here](#).

KEA Tags (only available in UI16)

How to review tags on a KEA?

1. Click the **3-dot icon (...)** in the header of the KEA to open the context menu.
2. All tags that have been added to this KEA are displayed in the **Tags** section.
3. Click the **cross (x)** next to the tag to delete any tag from the existing list if necessary.

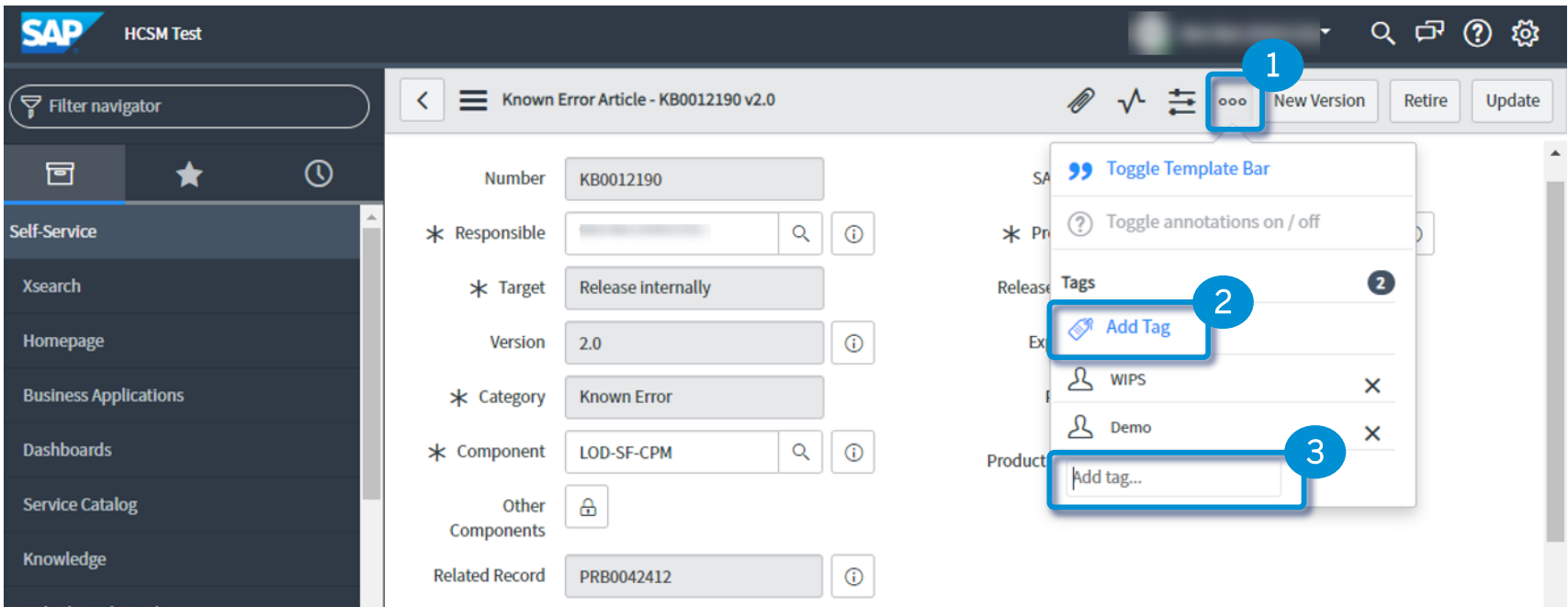


How to add tags on a KEA?

Different from editing the keywords for the KEA, adding tags does not affect the Release Status of the KEA (i.e. the status will NOT change to Review), nor does it require any publishing approval.

1. Click the **3-dot icon (...)** in the header of the KEA to open the menu list.
2. Click **Add Tag**. This activates a free text field at the bottom of the tag list that any tag information can be entered.
3. Start typing free text for each tag in the field. If there are any matching tags, they'll be suggested as you type.
4. Once done typing or selecting an existing tag, press **Enter** on keyboard to save the tag and enter another if needed.

Note: Unlike editing Keywords field in the KEA record, adding or deleting tags in the KEA does not require republishing. The tags are immediately updated even if the article is currently published.



What is a change log?
What you are reading is official SAP process documentation. Stringent version control is required for Compliance purposes. Thus, this **change log** is a record of who made what changes to this content & when, in case further follow up is needed.

Please send any questions or concerns to

Marcia Luna de la Cruz, [Walldorf](#)
Process manager

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Wei Wei	Mar 02, 2020	▪ WIPS 4.0 Golden Standard Baseline Documents	Published