Search for Knowledge

At a Glance

Knowledge Management Process

Search for Knowledge → **Update Knowledge Article** → **Create Knowledge Article** → **Publish Knowledge Article** → **Attach Knowledge Article to a Record** → **Retire Knowledge Article**

Search for Knowledge

Purpose

Proactively searching for knowledge helps determine whether the current issue has already been reported and solved with known solutions or workarounds. Using the existing solution or workaround reduces organization's costs and ensure that approved polices and procedures are followed.

The words and phrases used in the process of searching for knowledge also become candidate content to improve existing knowledge articles or to create new articles if nothing exists. By searching early and often, everyone benefits from the collective experience of solving problems and answering questions, making it reusable, and evolving it to reflect organizational-level knowledge.

Collect Information

When, no relevant knowledge are returned by the automated search's initial recommendations, or a search is being performed outside of the record, information regarding the issue will need to be collected to perform a manual search. For example:

- Keywords used by customers to describe the issue and/or cause of the issue
- Processor's own words to describe the issue and/or cause of the issue

Which UI to use when searching for KBA:

- KBA searches can be performed in both Agent Workspace and in UI16.
- xSearch can only be initialized outside of a Record in UI16

1. Search Within a Record

Option A: ServiceNow Automated Search

Scenario 1: Agent Workspace

1a Open Agent Assist
1b Review list of recommended articles
1c Adjust search terms if needed
1d View full article

Scenario 2: UI16

1a Access Related Search Results
1b Review list of recommended articles
1c Adjust search terms if needed
1d View full article

Option B: SAP xSearch

Scenario 1: Agent Workspace

1a Open xSearch from Record
1b Review list of recommended articles
1c Adjust search terms if needed
1d View full article

Scenario 2: UI16

1a Open xSearch from Record
1b Review list of recommended articles
1c Adjust search terms if needed
1d View full article

Option C: SAP ISM

Scenario 1: Agent Workspace

1a Open ISM from Record
1b Review list of recommended articles
1c Adjust search terms if needed
1d View full article

Scenario 2: UI16

1a Open ISM from Record
1b Review list of recommended articles
1c Adjust search terms if needed
1d View full article

Search Within a Record

2. Search Outside of a Record

Option A Search using xSearch (UI16 only)

2a Launch xSearch from UI16
2b Enter search terms using collected information
2c Review results
2d Adjust search terms if needed
2e View full article

Option B Search using Global Search (Agent Workspace & UI16)

2a Enter search terms in Global Search
2b Review results
2c Adjust search terms if needed
2d View full record

Search Outside of a Record

3. Examine Results

3a Review the information provided in the search to verify if the context (e.g. category, system, component, etc.) is relevant.

4. Determine if Solving Knowledge Exists

Scenario 1: Solving KBA found in the automated or manual search result

4a See WIPS entry for Attach a KBA.

Scenario 2: No solving KBA found

4a See WIPS entry for Create a KBA.

More information on search best practices can be found on the KM WIKI.

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1. Search Within Record

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Option A: ServiceNow Automated Search

Scenario 1: Agent Workspace – Using Agent Assist's automated KBA recommendations

1a Open Agent Assist

Notes

ServiceNow Agent Workspace uses contextual search to auto-populate KBA recommendations based on a record's Subject and provides those results in the Agent Assist sidebar of the record. If the recommended results from Agent Assist return a published KBA as a solution, the KBA status will be either **Released Internally** or **Released to Customer**. However, only KBAs that are **Published** and **Released to Customer** can be accessed by the customers.

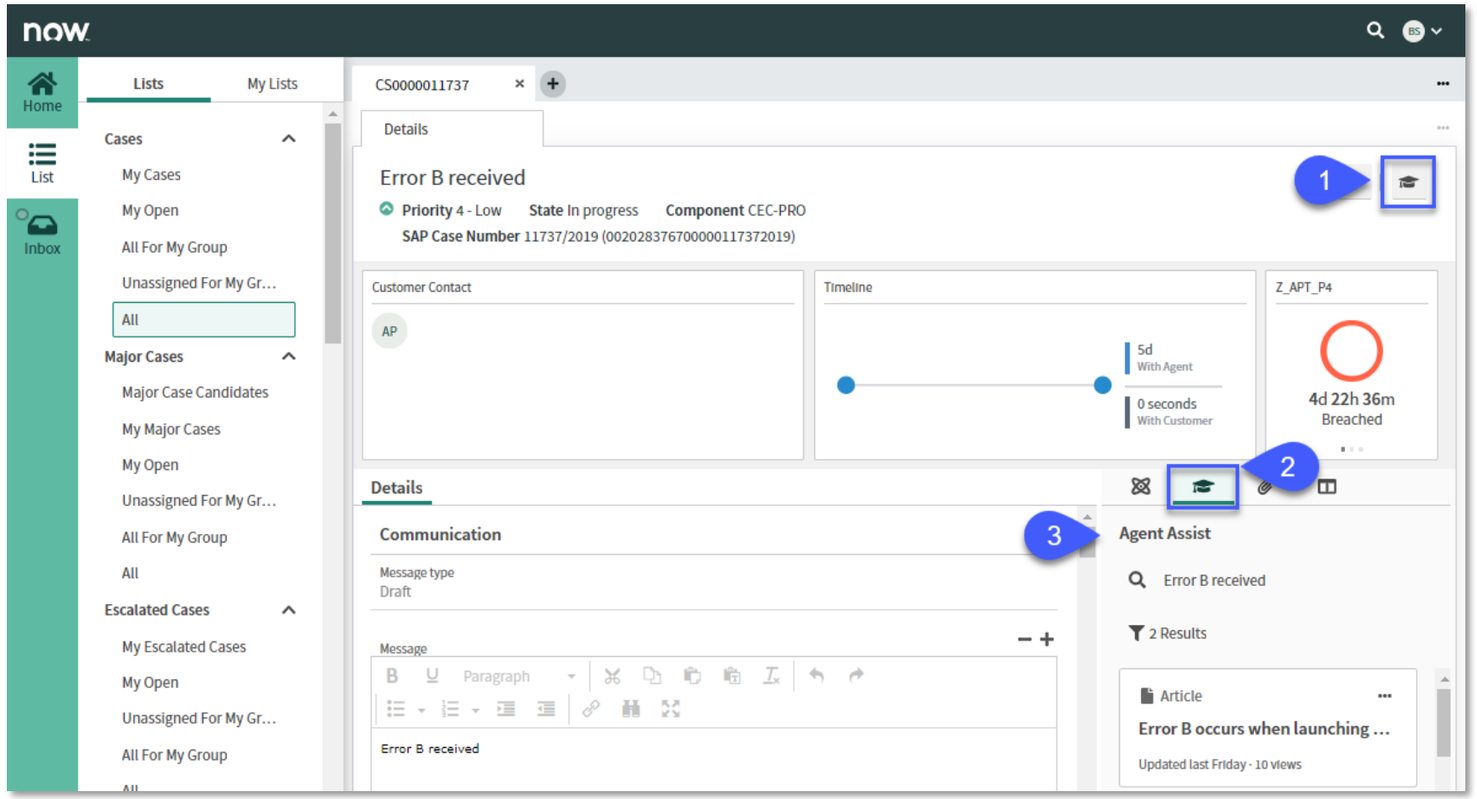
Step 1

Click the **Academia Hat** in the top right corner of the record to toggle the Assistant Sidebar on the right.

Step 2

Click the **Academia Hat** within the sidebar to access **Agent Assist**.

Agent Assist now appears in right hand sidebar.



Notes

What result is returned by Agent Assist?

- Agent Assist only returns KBAs stored in the NOW system.
- **In Process** and **Technical Review** KBAs will also be presented in Agent Assist and SAP xSearch. However, customers cannot access these KBAs unless they are **Published** and **Released to Customer**.
- All search options return the latest version of a KBA regardless of its published status (In Process, Review).

What result is NOT returned by Agent Assist?

- Any KBAs that have not been migrated from SAP's i7P system
- SAP Notes, WIKIs, Guided Answers, Community Posts, Help Portal Documents, BCP Incidents, etc.

Use SAP xSearch find these additional resources if needed.

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1. Search Within Record

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Option A: ServiceNow Automated Search

Scenario 1: Agent Workspace – Using Agent Assist's automated KBA recommendations

1b Review list of recommended articles

Step 1

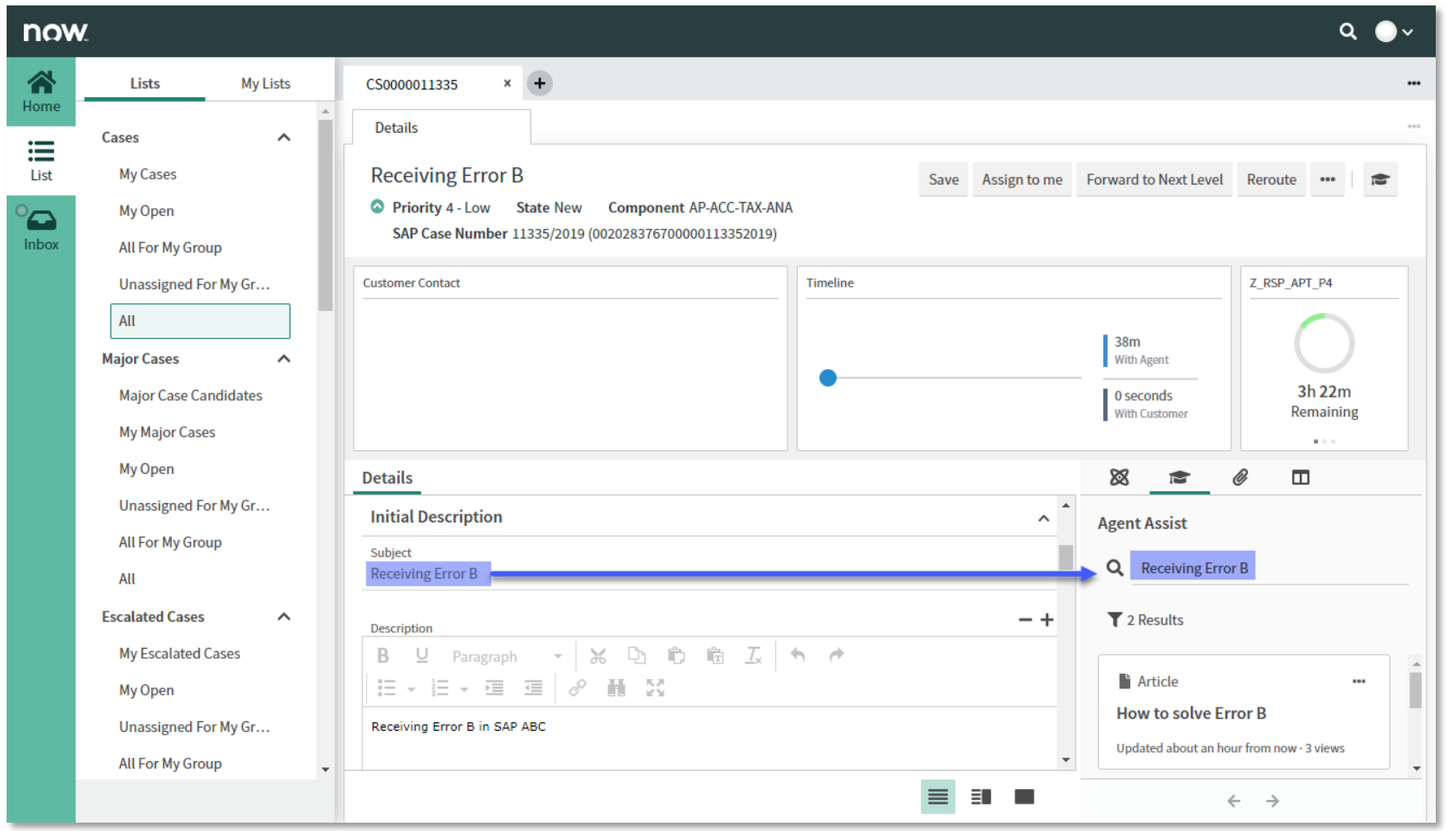
Review the populated list of recommended articles to determine whether a KBA can be potentially useful in solving the issue.

How does Agent Assist work?

Agent Assist takes the text from the record's Subject field and automatically performs a keyword search for matching KBAs.

Agent Assist searches the entire body of the KBA as well as the **keywords** and **tags** added to the KBA.

Agent Assist does not filter using the record's component or product details. These details may need to be added manually to the search filter to narrow down results.



Notes

Internal KBAs

Whenever attaching knowledge articles, you must ensure the content is safe to send to a customer.

When a KBA is flagged as ****INTERNAL USE ONLY****, do not paste the content into the **External Info** unless you are positive that it is safe to do so. If the content is not appropriate to send to the customer, work with the customer on the phone to execute the solution.

Make sure to only include safe text in the messages that your customer will read.

Internal KBAs can be attached to Cases (and should be if used in solution), but note that customers cannot access them unless they are set to **Published** and **Released to Customer**.

Agent Assist

- Only KBAs and KEAs stored in NOW are returned by Agent Assist.
- SAP Notes, Help Portal Documents, WIKIs, etc. are not returned.

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1. Search Within Record

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Option A: ServiceNow Automated Search

Scenario 1: Agent Workspace – Using Agent Assist's automated KBA recommendations

1c Adjust search terms if needed

Step 1

Go to **Agent Assist** sidebar.

Step 2

Type in search terms next to the magnifying glass.

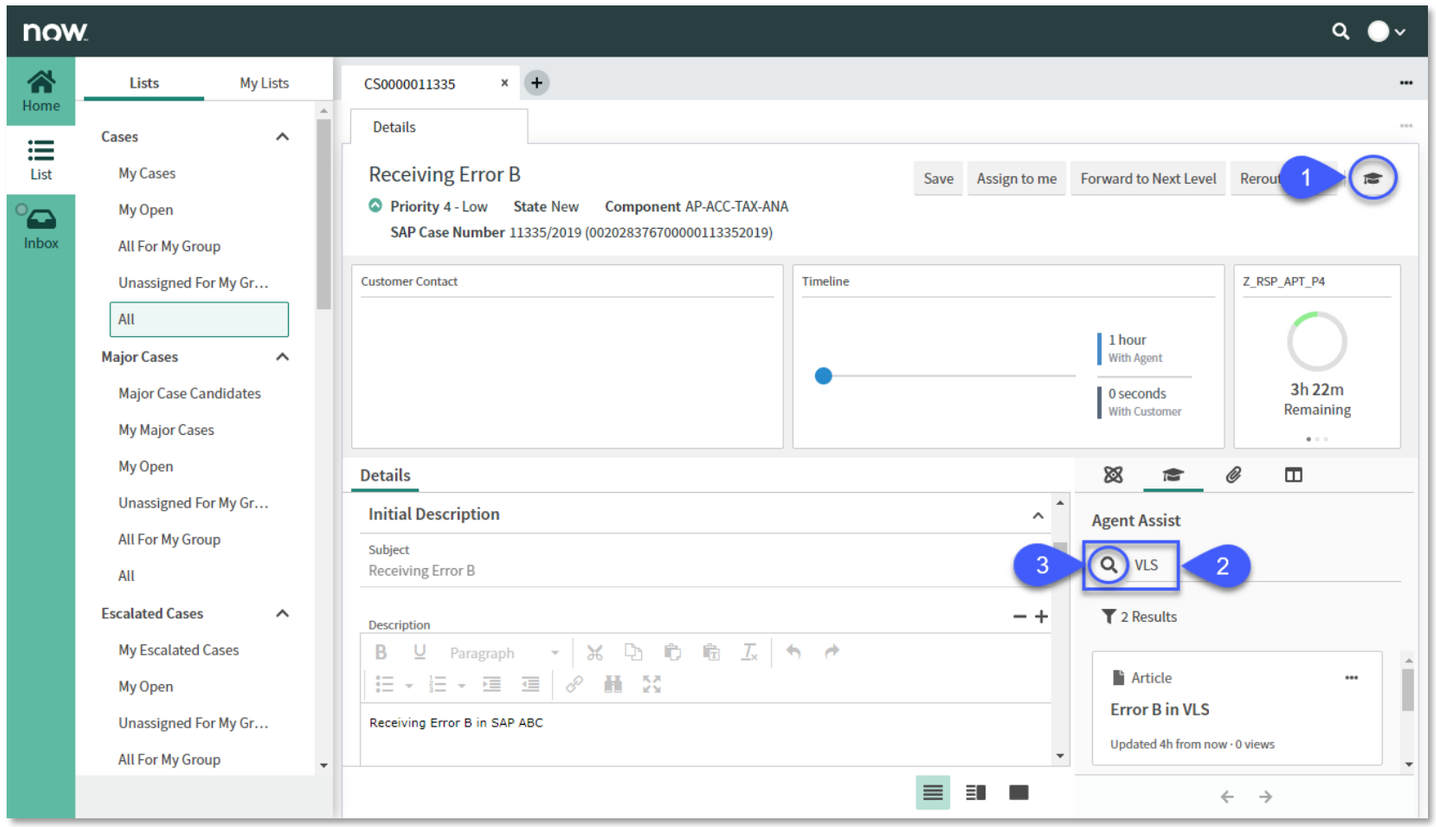
Step 3

Click the **Magnifying Glass** (or hit "Enter") to perform search.

Step 4

View the full article confirm if it is an appropriate solution for the issue.

See View Full Article section in this WIPS document for information on viewing the article



Notes

Search Early & Search Often

When automated recommended results do not contain a solving KBA for an issue, perform manual search to improve results.

Search terms consist of keywords collected from the record:

- how the customer has described the issue or the cause of the issue;
- how the processor himself has described the issue or the cause of the issue.

Agent Assist

- Only KBAs and KEAs stored in NOW are returned by Agent Assist.
- SAP Notes, Help Portal Documents, BCP Incidents, WIKIs, etc. are not returned.

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1. Search Within Record

Knowledge Management

Option A: ServiceNow Automated Search

Scenario 1: Agent Workspace – Using Agent Assist's automated KBA recommendations

1d View full article

Step 1

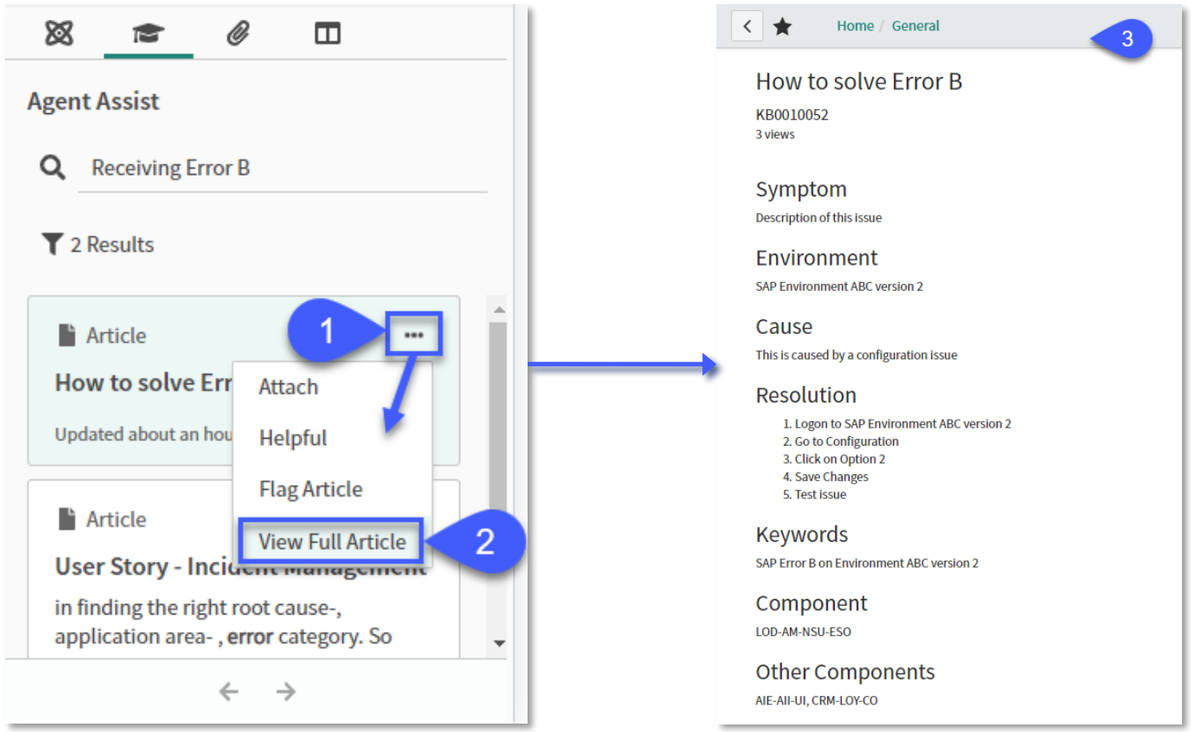
Click the **3-dot icon (...)** on the top right of the article to expand the UI action list.

Step 2

Select **View Full Article**.

Step 3

A new window opens with the full article for review to confirm if it is an appropriate solution for the issue.



What to pay attention to when viewing the full article?

- The article must be opened to see whether it is set to **Published**, **Released Internally** or **Released to Customer**. Agent Assist does not show the publish or release status in the search results.
- The full article should be viewed to determine if it contains a solution to the issue reported as the context may differ. Reviewing the list of KBAs may not provide enough insight on whether or not the article contains the solution.
- If the KBA is **NOT** customer facing, take extra caution to adjust the information in the KBA before providing to the customer so that it's appropriate for customer consumption.

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1. Search Within Record

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Notes

ServiceNow UI16 uses contextual search to auto-populate KBA recommendations based on a record's Subject and provides those results in the Related Search Results of the record.

If the recommended results from Related Search Results return a published KBA as a solution, the KBA status will be either **Released Internally** or **Released to Customer**. However, only KBAs that are **Published** and **Released to Customer** can be accessed by the customers.

Option A: ServiceNow Automated Search

Scenario 2: UI16 – Using Related Search's automated KBA recommendations

1a Access Related Search Results
1b Review list of recommended KBAs

Step 1

From within a record, click **Initial Description** tab.

Step 2

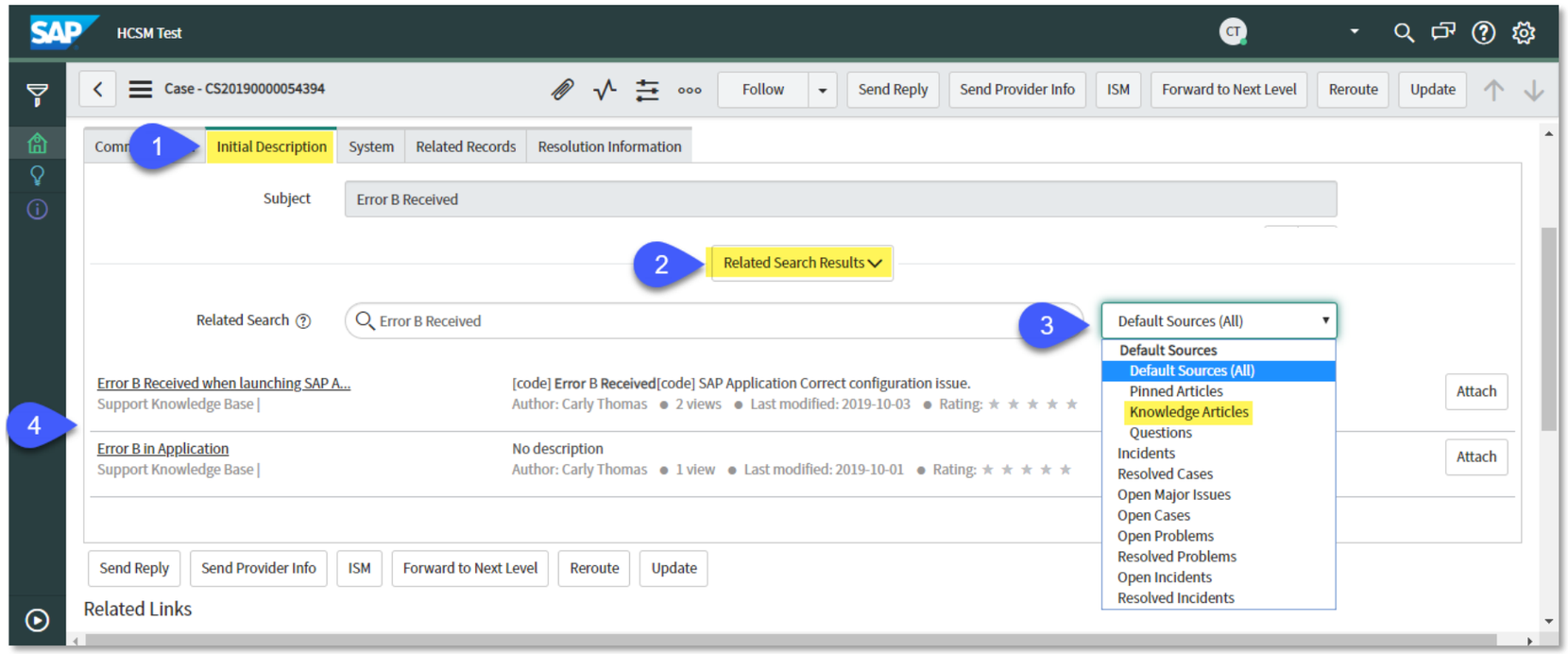
Click the **Related Search Results** box.

Step 3

Refine the "Default Sources" drop down selection to only return KBAs if needed.

Step 4

Review the populated list of recommended KBAs that are displayed below **Related Search Results** box.



Notes

What result is returned by Related Search Results?

- ServiceNow records include KBAs, Cases, Incidents, Problems.
- **In Process** and **Technical Review** KBAs will also be presented in NOW automatic search results and SAP xSearch. However, customers cannot access these KBAs unless they are **Published** and **Released to Customer**.

What result is NOT returned by Related Search Results?

- SAP Notes, WIKIs, Guided Answers, Community Posts, Help Portal Documents, etc.

How does Agent Assist work?

Related Search takes the text from the record's Subject field and automatically performs a keyword search for matching KBAs.

It searches the entire body of the KBA as well as **keywords** and **tags** added to the KBA.

Related Search does not filter using the record's component or product detail. These details may need to be added manually to the search filter to narrow down results.

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1. Search Within Record

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Option A: ServiceNow Automated Search

Scenario 2: UI16 – Using Related Search's automated KBA recommendations

1c Adjust search terms if needed

Step 1

Go to the **Related Search Results** section of the record.

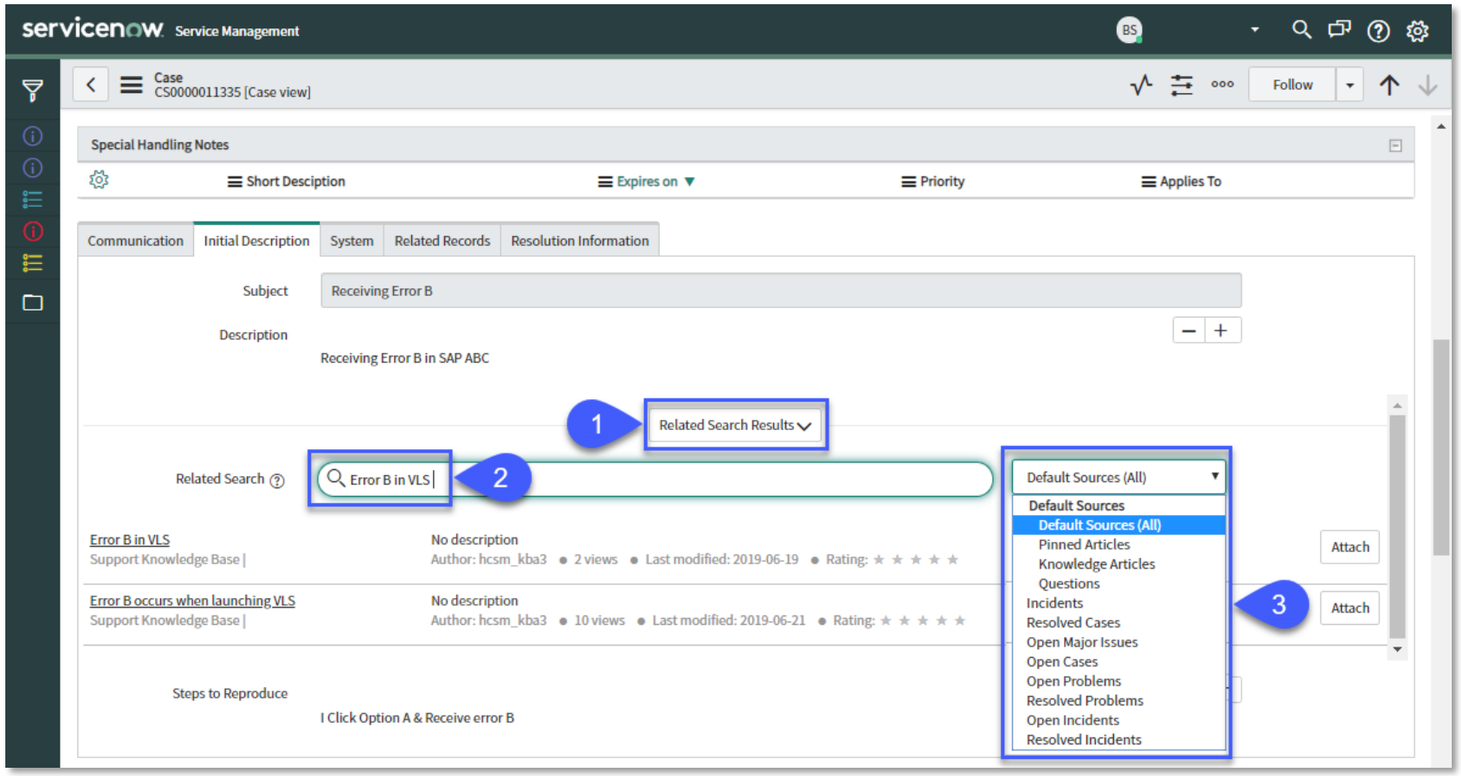
Step 2

Type in search terms next to the Magnifying Glass and hit "Enter".

Step 3

The **Default Sources** dropdown can be used to search knowledge articles or for similar records that are in ServiceNow.

However, when selecting Knowledge Articles, the returned result cannot distinguish between KBA and KEA. You may open the returned Knowledge Article to see whether this article is KBA or KEA.



Notes

Search Early & Search Often

When automated recommended results do not contain a solving knowledge for an issue, perform manual search to improve results.

Search terms consist of keywords collected from the record:

- how the customer has described the issue or the cause of the issue
- how the processor himself has described the issue or the cause of the issue

Related Search Results

- Only knowledge articles, Cases, Problems, and Incidents in ServiceNow are returned by Related Search.
- SAP Notes, Help Portal Documents, BCP Incidents, WIKIs, etc. are not returned.
- Use xSearch to search for other additional SAP knowledge sources.

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1. Search Within Record

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Option A: ServiceNow Automated Search

Scenario 2: UI16 – Using Related Search's automated KBA recommendations

1d View full article

Step 1

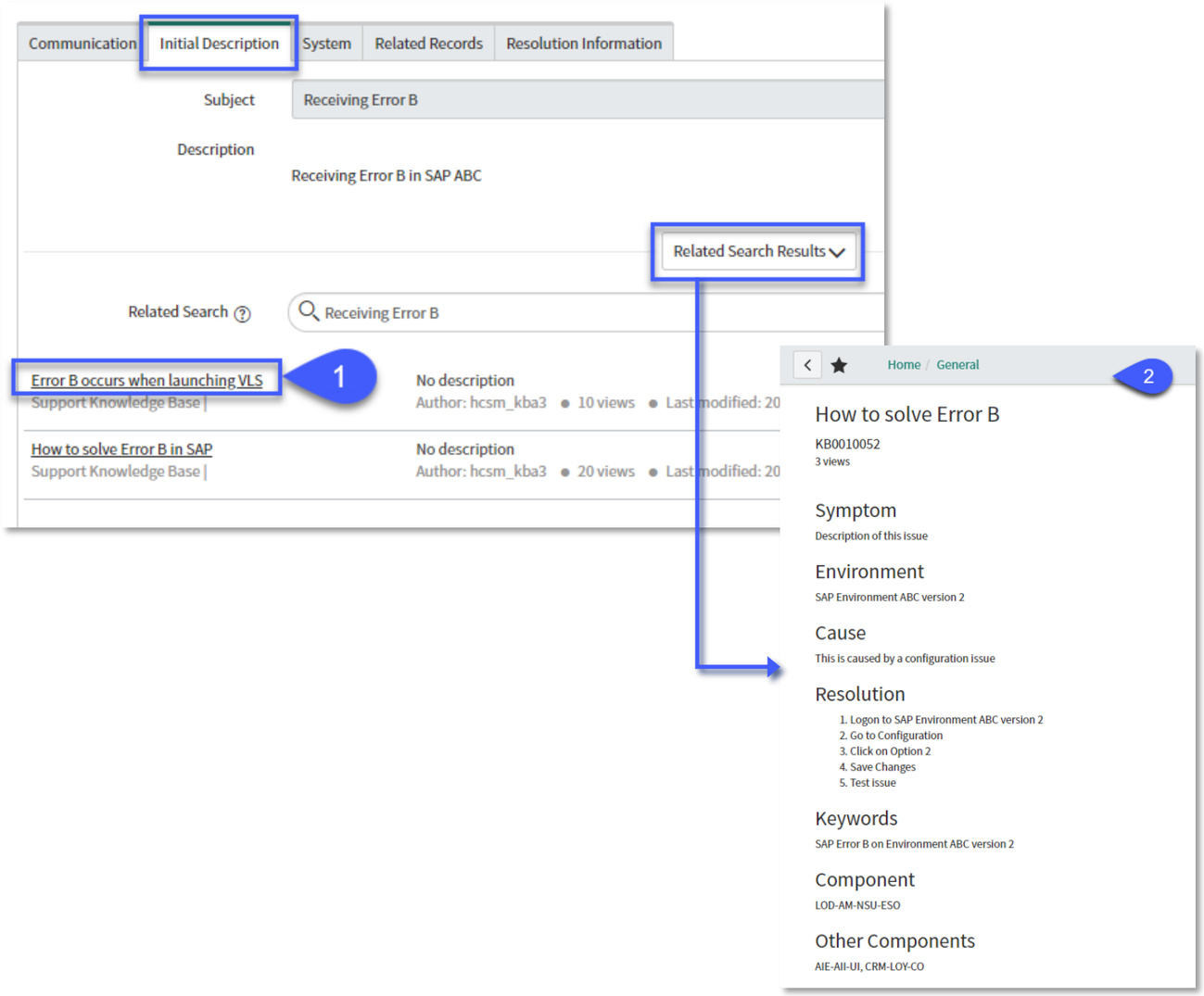
Click the hyperlinked title of the KBA to open the full article.

Step 2

A new window opens with the full article for review to confirm if it is an appropriate solution to the Case.

What to pay attention to when viewing the full article?

- The article must be opened to see whether it is set to **Published**, **Released Internally** or **Released to Customer**. Related Search does not show the publish or release status in the search results.
- The full article should be viewed to determine if it contains a solution to the issue reported as the context may differ. Reviewing the list of KBAs may not provide enough insight on whether or not the article contains the solution.
- If the KBA or KEA is **NOT** customer facing, take extra caution to adjust the information in the knowledge article before providing to the customer so that it's appropriate for customer consumption.



Notes

Internal KBAs

Whenever attaching knowledge articles, you must ensure the content is safe to send to a customer.

When a KBA is flagged as ****INTERNAL USE ONLY****, do not paste the content into the **External Info** unless you are positive that it is safe to do so. If the content is not appropriate to send to the customer, work with the customer on the phone to execute the solution.

Make sure to only include safe text in the messages that your customer will read.

Internal KBAs can be attached to Cases (and should be if used in solution), but note that customers cannot access them unless they are set to **Published** and **Released to Customer**.

Related Search Results

- Only knowledge articles, Cases, Problems, and Incidents in ServiceNow are returned by Related Search.
- SAP Notes, Help Portal Documents, BCP Incidents, WIKIs, etc. are not returned.

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1. Search Within Record

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Option B: SAP xSearch

Scenario 1: Agent Workspace – Using SAP xSearch from within a record

Notes

ServiceNow integrates with SAP xSearch, which can be launched from within a record in both UI16 and Agent Workspace. When launched from within a record, the description and component from the record is auto-populated as the search terms and component filter in xSearch.

xSearch can be launched outside of a case only in UI16.

Step 1

Click the **3-dot menu icon (...)** in the top right corner of the record's window to open the xSearch from within the record.

Step 2

Select **xSearch** to launch SAP xSearch.

Step 3

A new window is launched displaying the search results based on the following conditions:

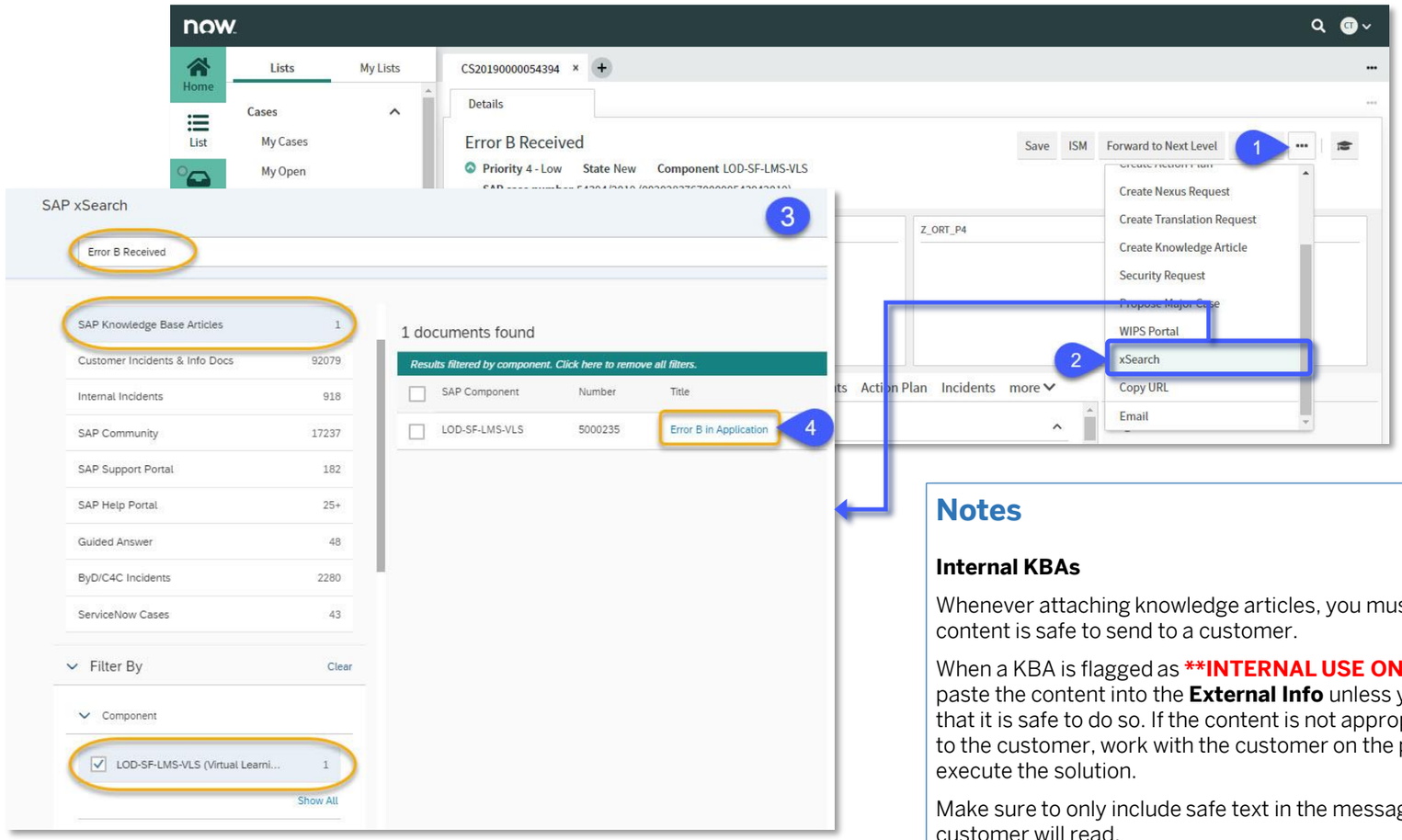
- Defaults on SAP Knowledge Base Articles results
- Record's Description is used as the default search terms
- Record's Component is added to the **KBA Component Filter**

Review the list of recommended articles.

Adjust the search terms if needed by trying to remove or expand the component filter or modify the keywords.

Step 4

Click on the hyperlinked KBA title in the search results to view the full article.



Notes

What result is returned by SAP xSearch?

xSearch returns all SAP knowledge assets including KBAs and KEAs (created in NOW and i7P), WIKIs, SAP Notes, Guided Answers, Product Documentation, etc.

Notes

Internal KBAs

Whenever attaching knowledge articles, you must ensure the content is safe to send to a customer.

When a KBA is flagged as ****INTERNAL USE ONLY****, do not paste the content into the **External Info** unless you are positive that it is safe to do so. If the content is not appropriate to send to the customer, work with the customer on the phone to execute the solution.

Make sure to only include safe text in the messages that your customer will read.

Internal KBAs can be attached to Cases (and should be if used in solution), but note that customers cannot access them unless they are set to **Published** and **Released to Customer**.

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1. Search Within Record

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Option B: SAP xSearch

Scenario 2: UI16 – Using SAP xSearch from within a record

Notes

ServiceNow integrates with SAP xSearch, which can be launched from within a record in both UI16 and Agent Workspace. When launched from within a record, the description and component from the record is auto-populated as the search terms and component filter in xSearch.

xSearch can be launched outside of a case only in UI16.

Step 1

Click the **3-line context menu icon** in the top left corner of the record's window to open the xSearch from within the record.

Step 2

Select **xSearch** to launch SAP xSearch.

Step 3

A new window is launched displaying the search results based on the following conditions:

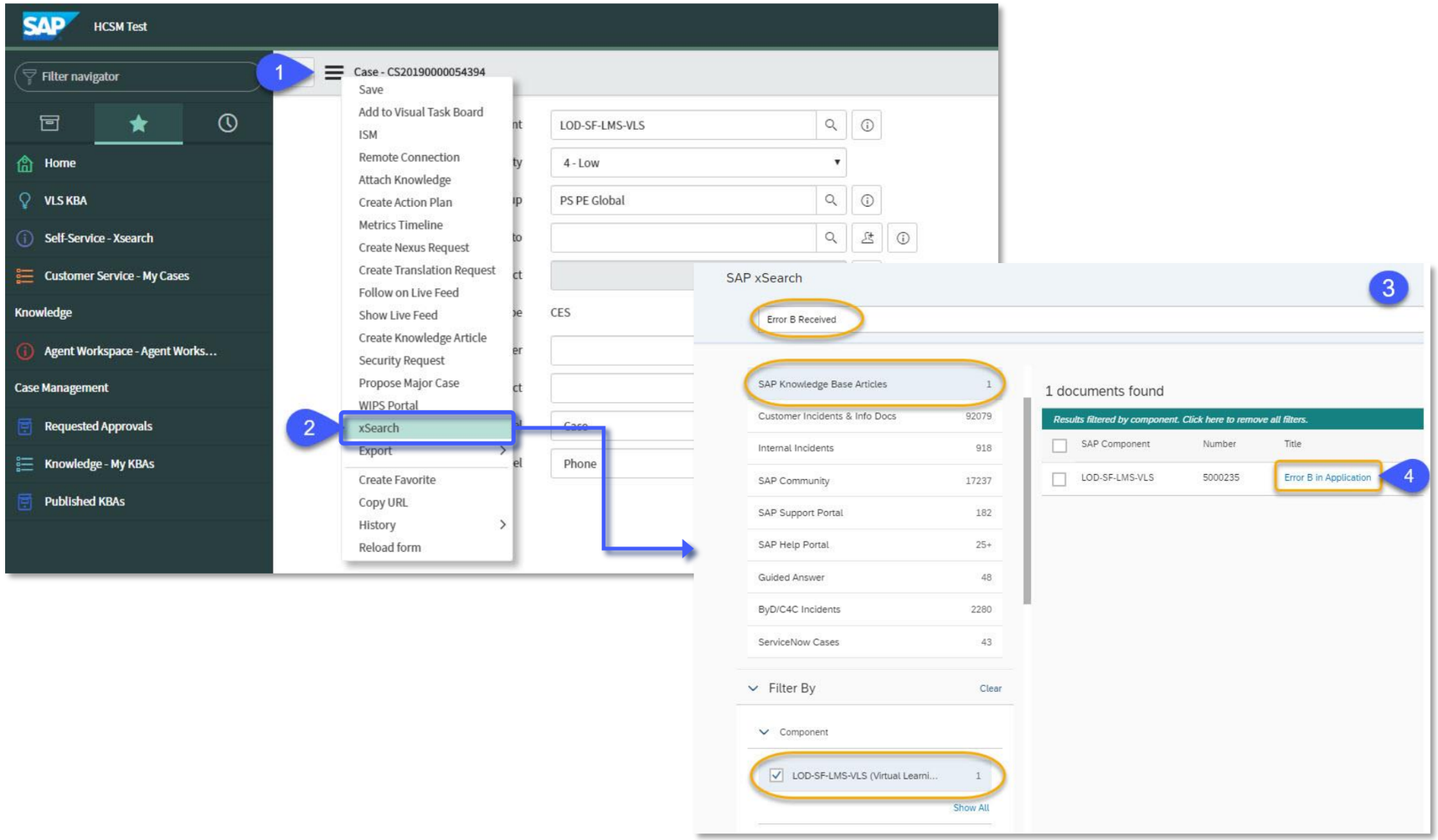
- Defaults on SAP Knowledge Base Articles results
- Record's Description is used as the default search terms
- Record's Component is added to the **KBA Component Filter**

Review the list of recommended articles.

Adjust the search terms if needed by trying to remove or expand the component filter or modify the keywords.

Step 4

Click on the hyperlinked KBA title in the search results to view the full article.



Notes

What result is returned by SAP xSearch?

xSearch returns all SAP knowledge assets including KBAs and KEAs (created in NOW and i7P), WIKIs, SAP Notes, Guided Answers, Product Documentation, etc.

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1. Search Within Record

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Option C: SAP ISM

Scenario 1: Agent Workspace – Using SAP ISM from within a record

Notes

ServiceNow integrates with SAP ISM, which can be launched from within a record in both UI16 and Agent Workspace. When launched from within a record, the description and component from the case is populated as the search terms and component filter in ISM.

ISM cannot be launched from outside of a record.

Step 1

Click **ISM** to launch the ISM search.

If the UI action buttons are collapsed due to screen sizing, click the **3-dot menu icon (...)** in the top right corner of the record's window to expand the UI action list.

Step 2

A new window is launched displaying the search results based on the following conditions:

- Solutions returns a list of SAP Knowledge Articles and SAP Notes
- Record's Description is used as the default search terms (but does not appear in the Keywords bar)
- Record's Component is part of the keyword search

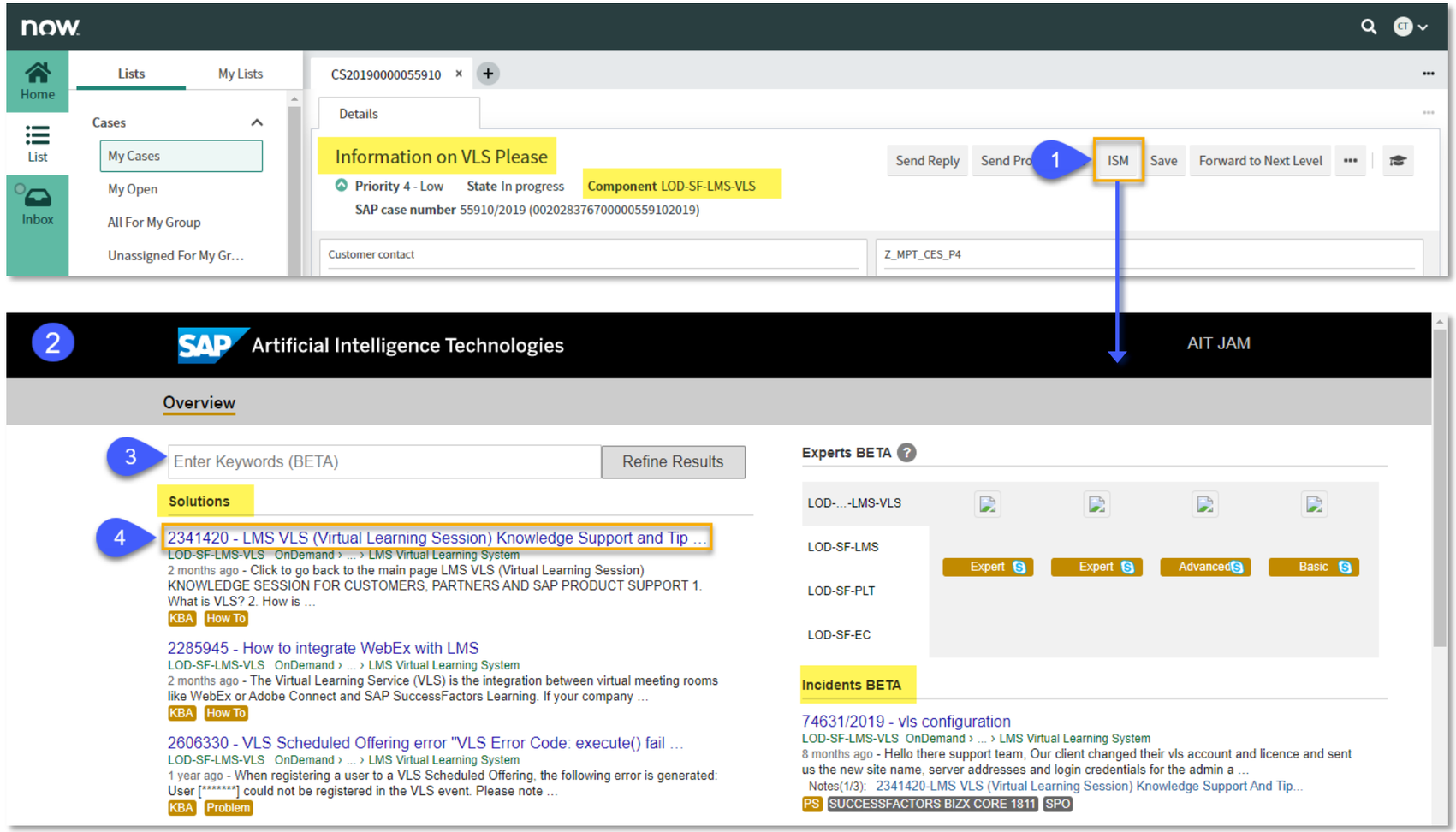
Review the list of recommended articles.

Step 3

Adjust the search terms if needed by trying to remove or expand the component filter or modify the keywords.

Step 4

Click on the hyperlinked KBA title in the search results to view the full article. A new browser tab is opened with the KBA.



Notes

- KBAs cannot be attached to a record via the ISM search results. The KBA number will need to be copied and manually attached to the record.
- ISM returns all SAP KBAs, Notes and past Incidents from the BCP system. It also returns Experts in the product area of the record.

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1. Search Within Record

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Option C: SAP ISM

Scenario 2: UI16 – Using SAP ISM from within a record

Notes

ServiceNow integrates with SAP ISM, which can be launched from within a record in both UI16 and Agent Workspace. When launched from within a record, the description and component from the case is populated as the search terms and component filter in ISM.

ISM cannot be launched from outside of a record.

Step 1

Click **ISM** from within the record to launch the ISM search.

Step 2

A new window is launched displaying the search results based on the following conditions:

- Solutions returns a list of SAP Knowledge Articles and SAP Notes
- Record's Description is used as the default search terms (but does not appear in the Keywords bar)
- Record's Component is part of the keyword search

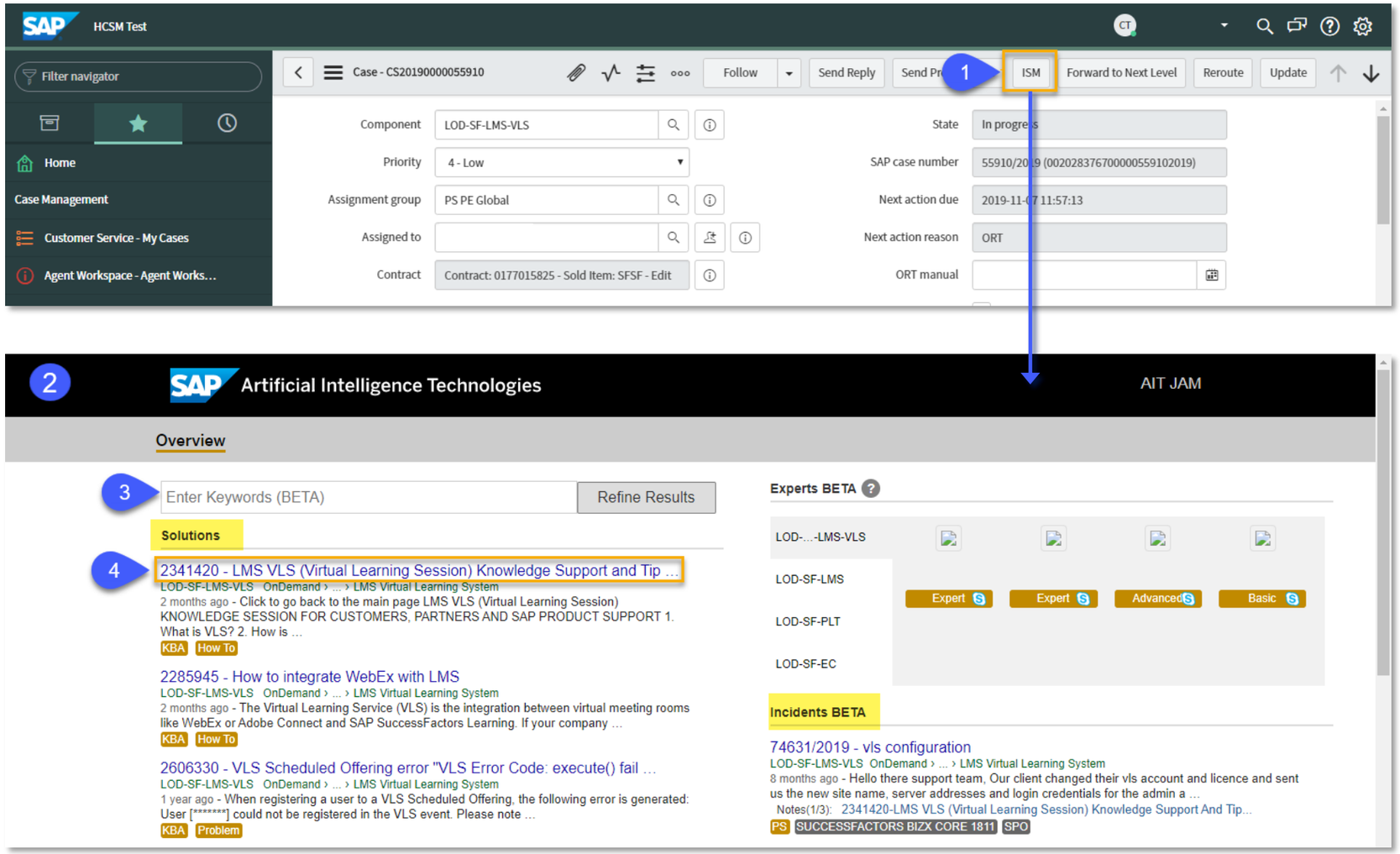
Review the list of recommended articles.

Step 3

Adjust the search terms if needed by trying to remove or expand the component filter or modify the keywords.

Step 4

Click on the hyperlinked KBA title in the search results to view the full article. A new browser tab is opened with the KBA.



Notes

- KBAs cannot be attached to a record via the ISM search results. The KBA number will need to be copied and manually attached to the record.
- ISM returns all SAP KBAs, Notes and past Incidents from the BCP system. It also returns Experts in the product area of the Case.

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2. Search Outside Record

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Option A: SAP xSearch

Only UI 16 when searching outside record using SAP xSearch,

Notes

Since Agent Assist does not have the filtering functionality of SAP xSearch, it may be necessary to use SAP xSearch tool to search for a solution, allowing you to filter down on Product, Component, Category, etc. of a KBA. It also returns additional knowledge sources such as SAP Notes, WIKIs, Guided Answers and Community posts.

2a Launch xSearch from UI16

1. Click **xSearch** in the **Application Navigator** under the **Self-Service** module.
2. A portal to xSearch is displayed within UI16.

2b Enter search terms using collected information

3. Use the search terms collected from the record to search via xSearch, which returns all possible knowledge sources.

2c Review results

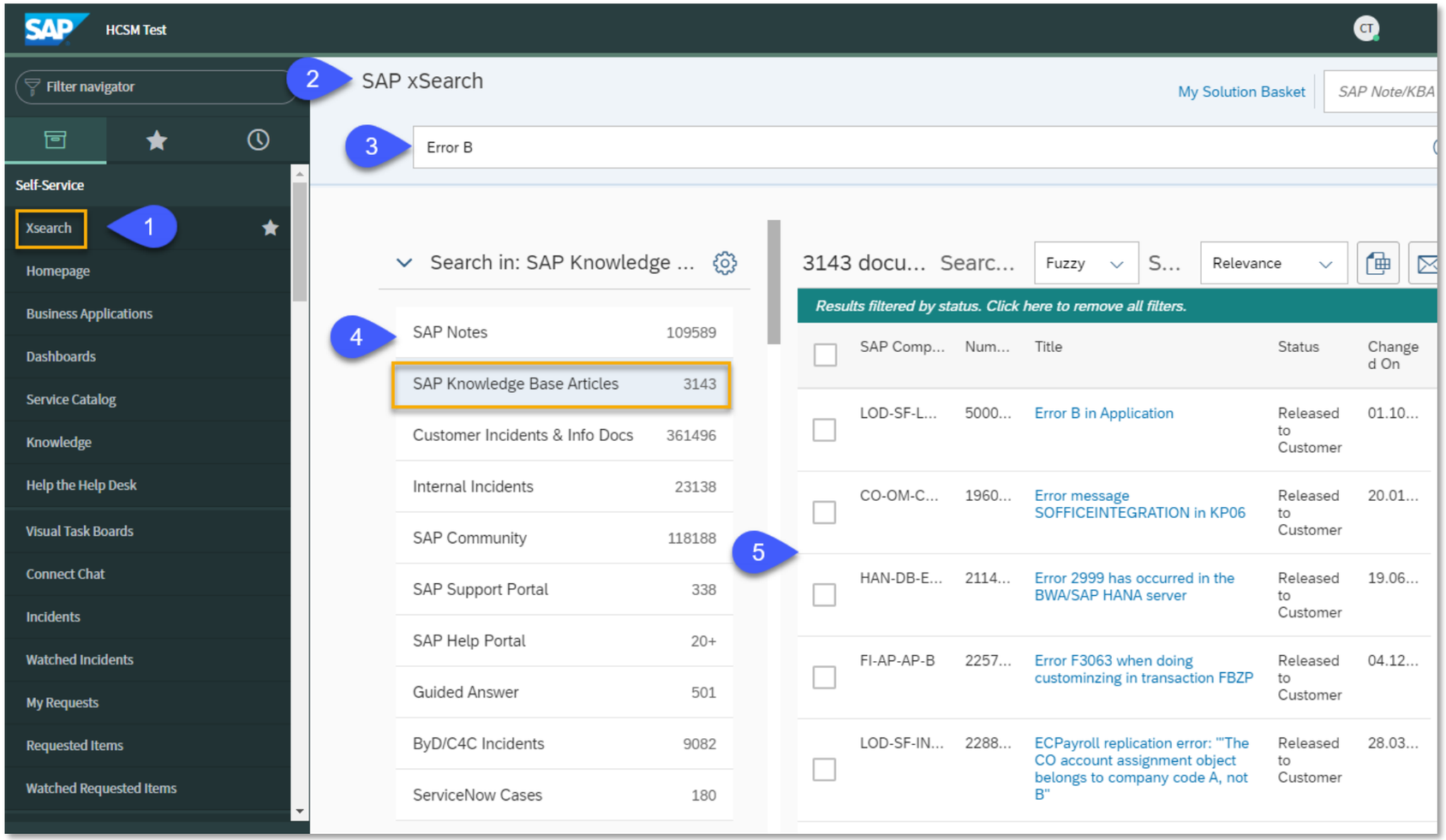
4. The search results defaults on SAP Notes. Click any of the listed repositories (e.g. **SAP Knowledge Base Articles**) to see returned results.
5. Review the populated list of recommended articles to determine whether an article can be potentially useful in solving the issue.

2d Adjust search terms if needed

- If too many results are returned, add component or product filter in the left hand menu, or use more definitive search terms.
- If no relevant search results are returned, try removing or expanding the component filter or adjusting the key words.

2e View full article

Click the hyperlinked KBA title in the search results to view the full article.



Notes

- You cannot attach xSearch results directly to a record. Follow the steps in the WIPS entry for Attach a KBA to provide the KBA as a solution.
- More information on using SAP xSearch can be found on the KM WIKI.

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2. Search Outside Record

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Option B: ServiceNow Global Search

Global Search enables the search for all records in ServiceNow, including knowledge articles, Cases, Incidents, and Problems. Global Search is available in both Agent Workspace and UI16.

2a Enter search terms in Global Search

1. Click the **Magnifying Glass** to activate **Global Search** at the top of the webpage.
2. Type in search terms and hit "Enter".
3. Note the categorization of the returned results on the right column.
4. KBAs are returned and categorized by the **Release State** (e.g. Published, Draft, Retired).

2b Review results

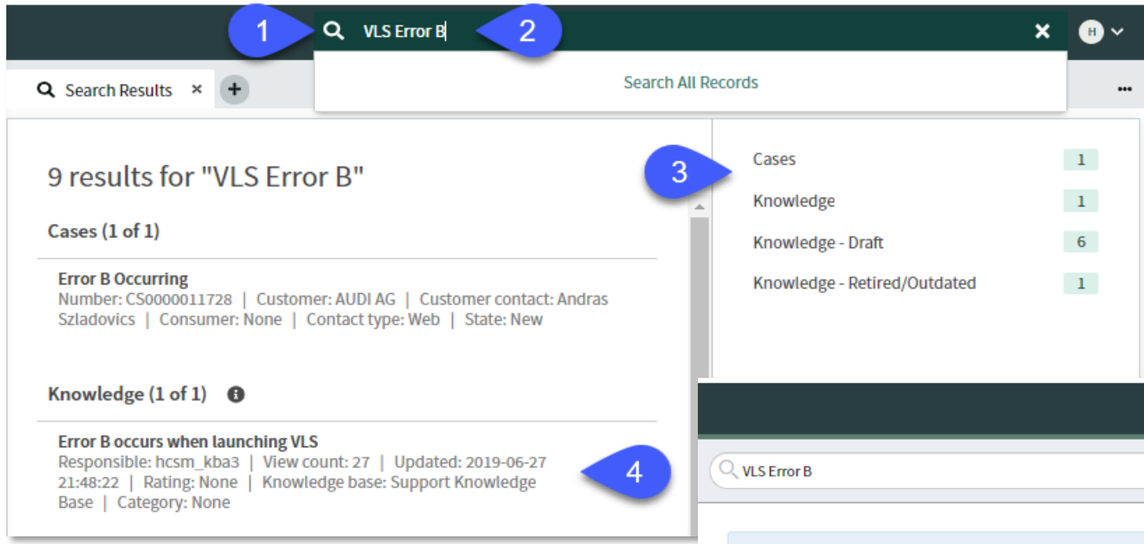
Review the populated list of recommended records to see whether any record can be potentially useful in solving the issue.

2c Adjust search terms if needed

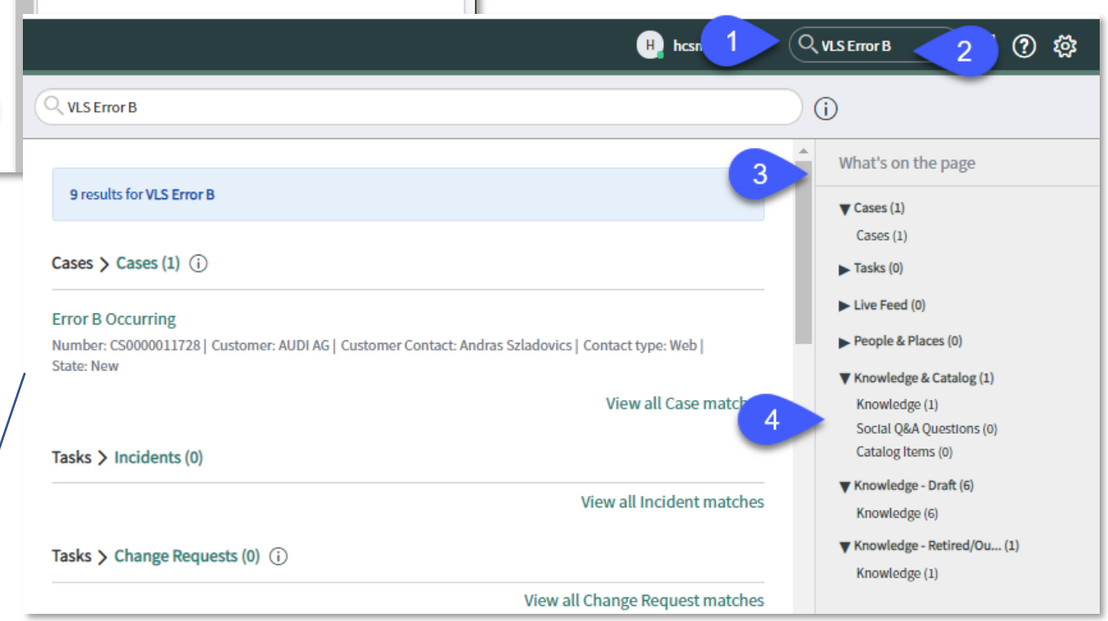
If too many results are returned, add component or product to the search terms, or use more definitive search terms.

2d View full record

Click the hyperlinked record title in the search results to view the full record.



Agent Workspace



UI16

Notes

- The search results returned by Global Search functionality are from the ServiceNow system only.
- SAP Notes, WIKIs, Help Portal Documentations, BCP Incidents, etc. that are not in the ServiceNow system are NOT returned.
- SAP KBAs that have NOT been migrated from SAP to ServiceNow are NOT returned.
- Use SAP xSearch if additional knowledge sources are needed.

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3. Examine Results
4. Determine if Solving Knowledge Exists

Knowledge Management

Notes

In this release, the work instruction focuses on Knowledge Base Articles (KBAs) as the main topic.
Instructions on how to create, update, publish, retire, and attach Known Error Articles (KEAs) will be available soon.

3. Examine Results

Review the information provided in the search result and read the full knowledge articles to verify if the documented context (e.g. category, system, component, etc.) in the solution found is relevant for your issue.

4. Determine if Solving Knowledge Exists

Scenario 1: Solution found

Follow the steps in the WIPS entry for Attach a KBA and provide the knowledge article as the solution.

Scenario 2: Solution not found during initial search

If the article does not contain the solution, continue with the following steps to adjust your search first:

1. Review the remaining recommended articles
2. Adjust/Refine Search Terms

Scenario 3: Solution not existing after comprehensive search

Follow the steps in the WIPS entry for Create a KBA.

Important Note:

Always perform comprehensive search before creating any new knowledge article in the system in order to avoid duplicates and simply the knowledge sharing and searching experience within the organization.

More information on search best practices can be found on the KM WIKI.

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Change Log

Knowledge Management – Search for Knowledge

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	Carly Thomas	Nov 25, 2019	▪ WIPS 4.0 Golden Standard Baseline Documents	Published

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