Create a KBA

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

Create a KBA

Purpose

KBAs are created to:

- Enable self-service strategy;
- Solve issues faster;
- Make upgrades and implementations smoother;
- Request for publishing the KBAs in a ore timely and structured approach.

Best Practices for Creating KBAs

KCS recommends to collaborate among various teams to capture the issue reported by the customer and provide the resolution of the issue in ONE KBA.

- When creating new KBA while working on the record in parallel, the original record processor should attach the KBA that is "In Process" to the record and transfer the record over to the new team for processing, if the component of the issue needs to be changed.
- Once the record is assigned to the new team, the newly assigned processor is should update and complete the KBA with the resolution found.
- Write the KBA in the way that customers can understand and avoid using jargons and internal terms.

1. Search for KBAs

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 KBA (e.g. resolution, workarounds, etc.)

3. Create KBA Record

Scenario 1: Create KBA from related record

Option A: Open new KBA form in Agent Workspace

Option B: Open new KBA form in UI16

Scenario 2: Create KBA outside related record

Open new KBA form in UI16

Important Note:

- KBAs cannot be created outside a record in Agent Workspace.
- KBAs can be created during any state of the Case or Incident record.
- KBAs can ONLY be created from Problem record during the state of Fix in Progress, Resolved, or Closed.

4. Fill in KBA Information

4a Fill in the applicable fields in the KBA form

a. Header and status details

b. KBA main body content

c. Other fields:
   - Expires on
   - Bridge KBA
   - Product and Product Version
   - KBA Attachments
   - KBA Tags (only in UI16)

Click here to see how to fill in locked KBA fields in UI16.

5. Request for Publishing

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

See WIPS entry: Publish a KBA for detailed explanation of how to publish the KBA.

Notes

Who can create KBAs?

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

The KM roles (levels) and permissions in the system are explained here.

Always SEARCH before creating any new KBA to avoid duplicates.

The KBA Quality Assurance Do's and Dont's page provides best practices when it comes to searching and not duplicating content.

Best Practices for Content Creation

- KBA Content Standards Guide
- KBA Hints and Tips (How To)

Back

3. Create KBA Record

Knowledge Management

Scenario 1: Create KBA from a related record

Option A: Create a new KBA in Agent Workspace

Step 1

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

Step 2

Select **Create Knowledge Article** to open a new KBA record.

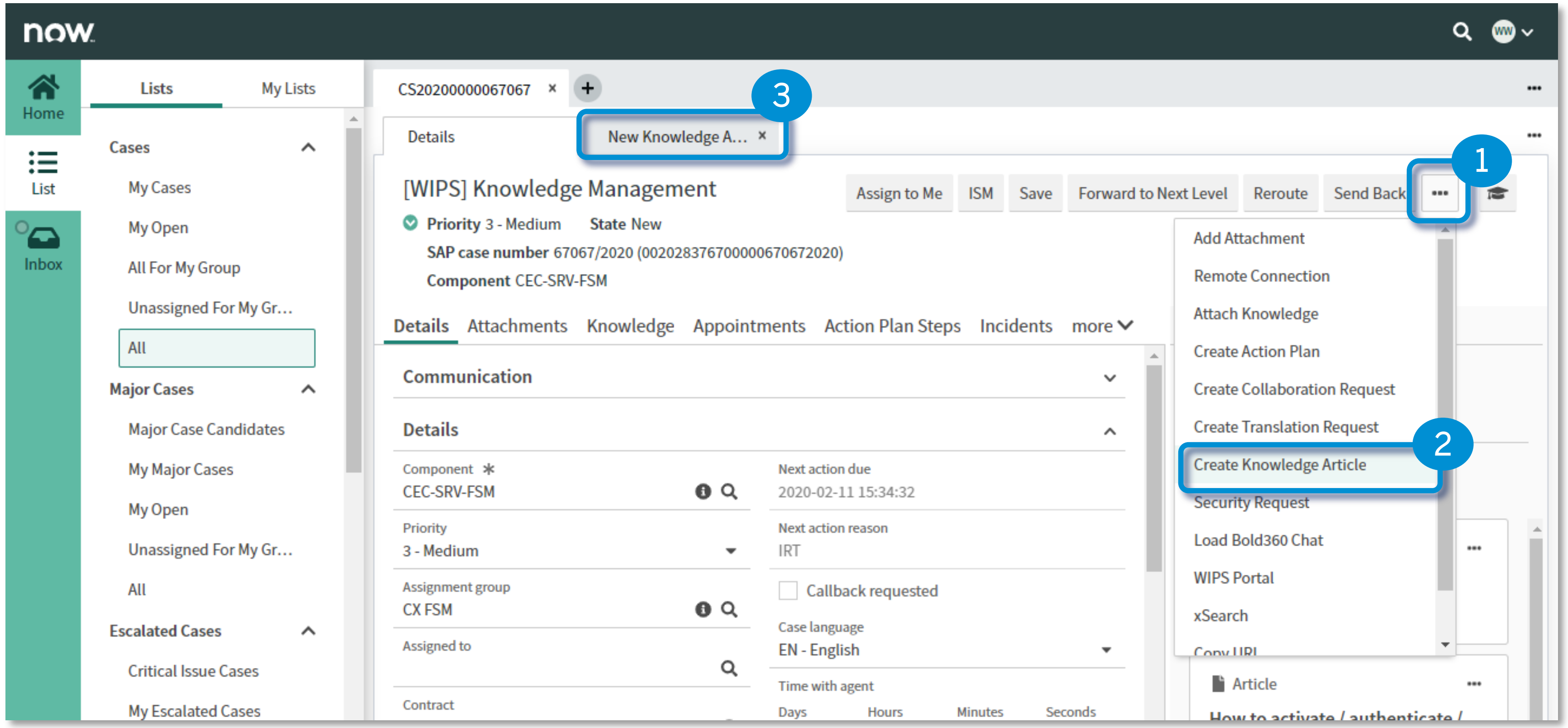
Step 3

The KBA record is opened in the new tab.

Notes: The following fields are auto-populated based on information from the original record (e.g. Case, Incident, Problem) when creating KBA:

- **Responsible** (default as your name)
- **Target** (default as Release internally)
- **Category** (default as Problem)
- **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)
- **Bridge KBA** (default as No)
- **Product** (editable)
- **Product Version** (editable)
- **Title** (replicated)

See the section Fill in KBA Information for more information on KBA fields.



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 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.

3. Create KBA Record

Knowledge Management

Scenario 1: Create KBA from a related record

Option B: Create a new KBA in UI16

Step 1

Click the **3-line hamburger menu icon** in the top-left corner of the 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**.

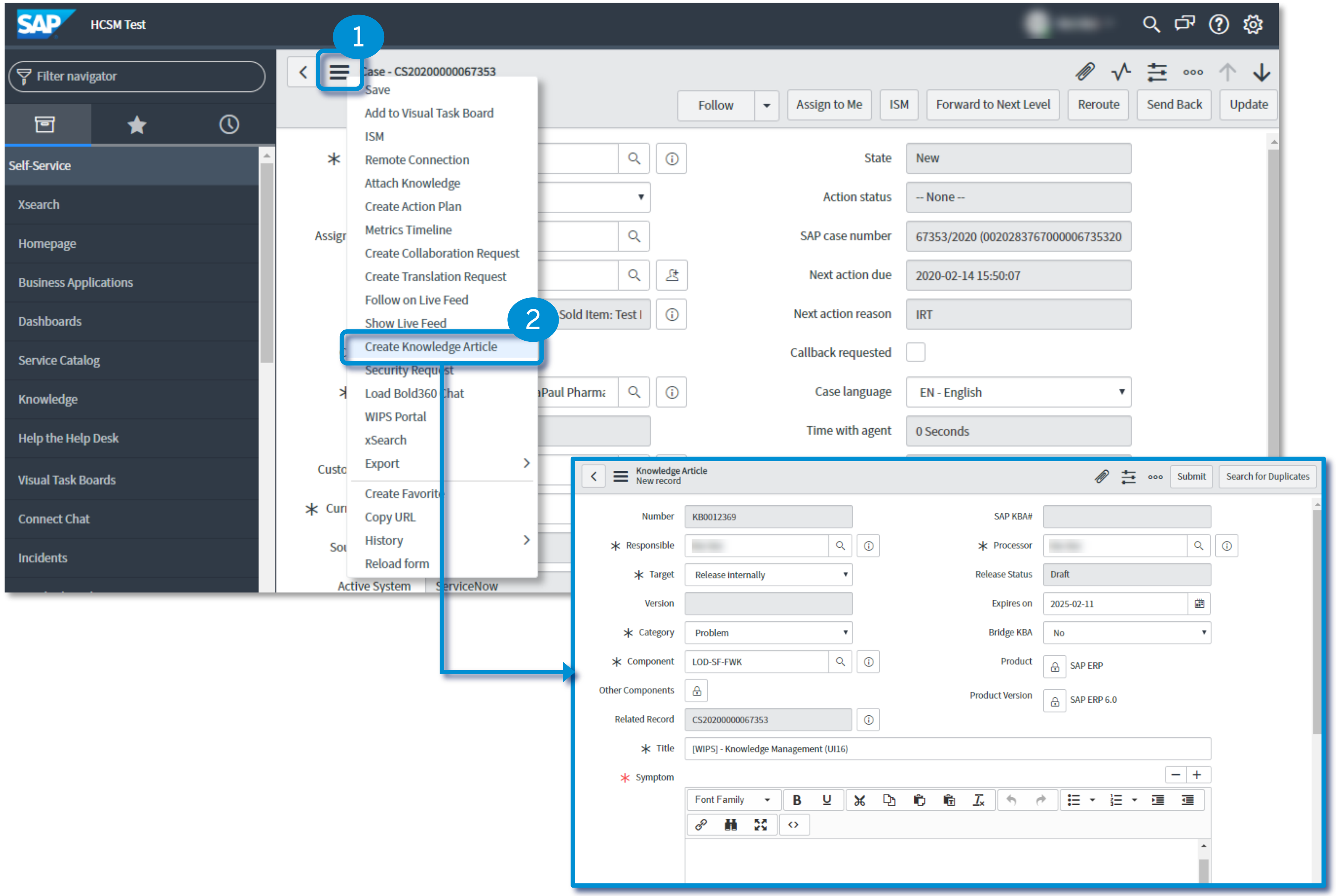
Step 3

The new KBA record is opened within UI16.

Notes: The following fields are auto-populated based on information from the original record (e.g. Case, Incident, Problem) when creating KBA:

- **Responsible** (default as your name)
- **Target** (default as Release internally)
- **Category** (default as Problem)
- **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)
- **Bridge KBA** (default as No)
- **Product** (editable)
- **Product Version** (editable)
- **Title** (replicated)

See the section Fill in KBA Information for more information on KBA fields.



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 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.

Content Standards and Guidelines:

Follow the KBA Content Standards Guide and KBA How Tos on the KM WIKI for standards on creating KBAs.

3. Create KBA Record

Knowledge Management

Back

Scenario 2: Create KBA outside a related record

Create a new KBA in UI16

Step 1

Type **Knowledge** in the top-left search box and expand the **Knowledge Module** in the Application Navigator.

Alternatively simply scroll down to **Knowledge Module** in the **Application Navigator**.

Step 2

Select **Create New** under the section **Articles** in the **Knowledge Module**.

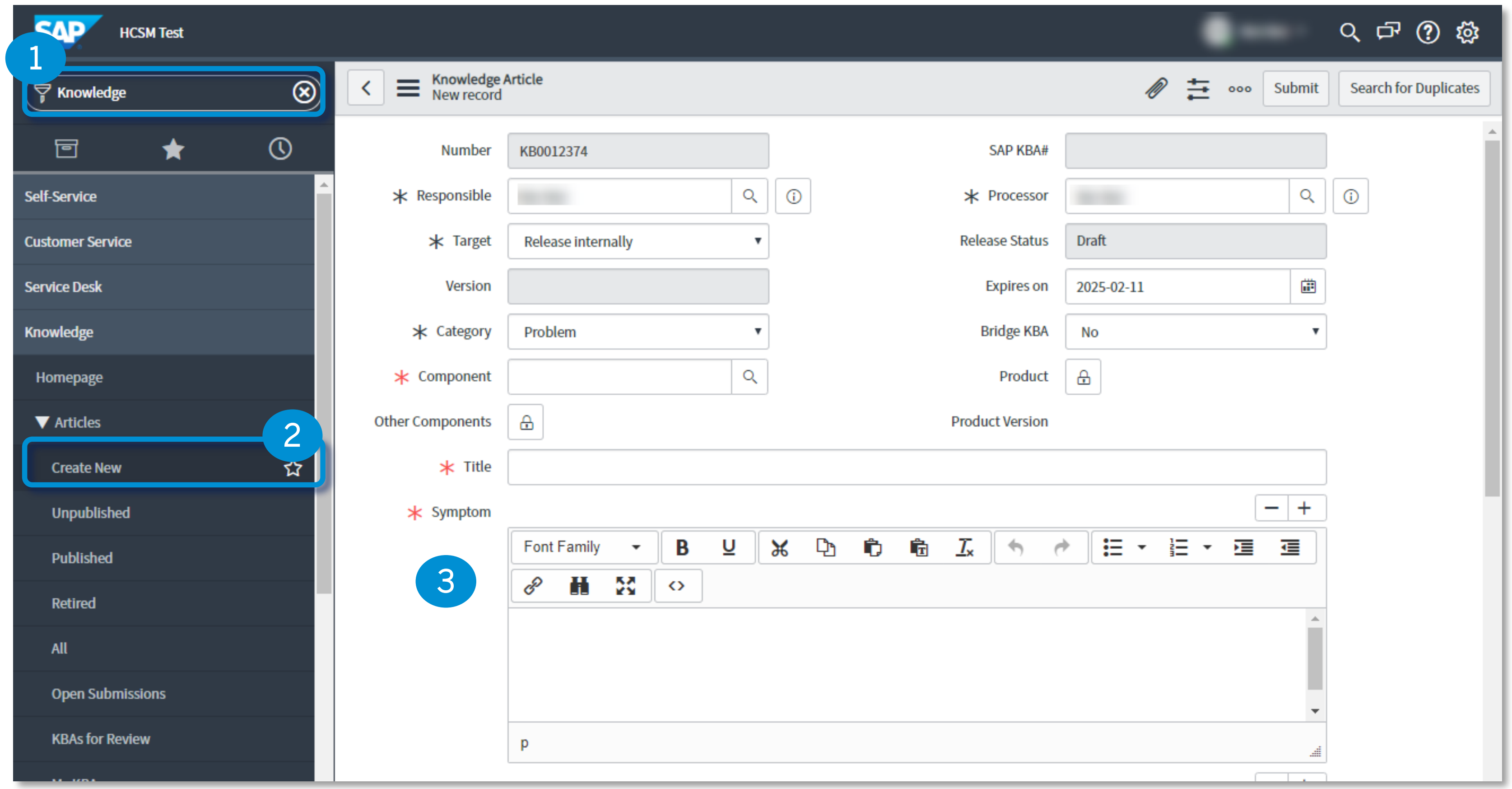
Step 3

The new KBA record is created within UI16.

Notes: The following fields are auto-populated when creating KBA:

- **Responsible** (default as your name)
- **Target** (default as Release internally)
- **Category** (default as Problem)
- **Processor** (default as your name)
- **Release Status** (set as Draft and read-Only)
- **Expires on** (default as 5 years)
- **Bridge KBA** (default as No)

See the section [Fill in KBA Information] for more information on KBA fields.



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.

Content Standards and Guidelines:

Follow the [KBA Content Standards Guide] and [KBA How Tos] on the KM WIKI for best practices on creating KBAs.

4. Fill in KBA Information

Knowledge Management

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 KBA can be saved. Further detail can be found in KBA – How Tos: Populate the Header Data.

KBA Header

a. **Number**, **SAP KBA#**, **Related Record, Version**: auto-populated by ServiceNow and read-only.

b. **Responsible** * : When creating a KBA, 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 KBA.

c. **Processor** * : This field is populated with your name automatically when creating the KBA. It is the user that is assigned to execute specific action for this KBA. 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.

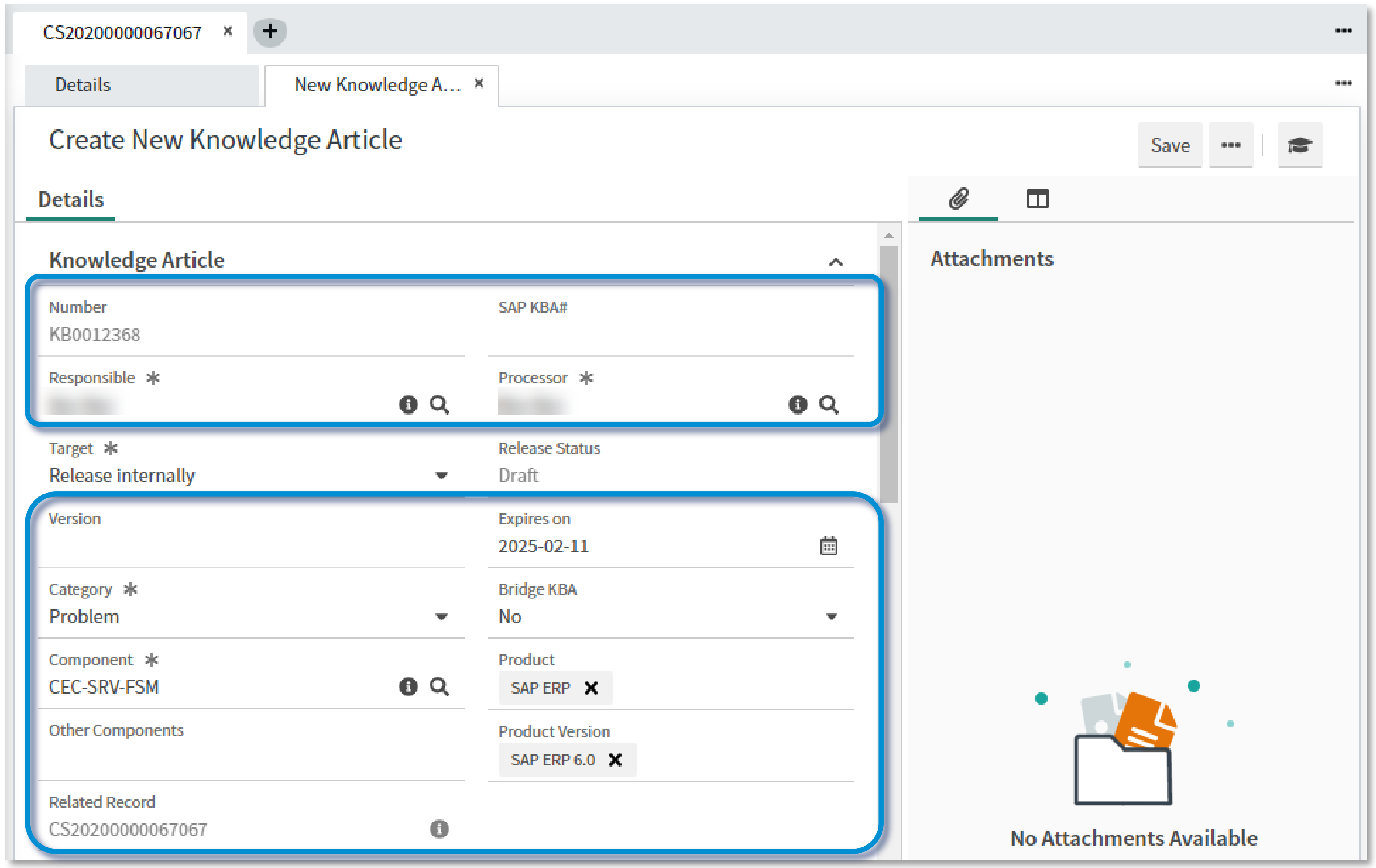
d. **Component** * : Add the primary component that the KBA applies to in **Component** field. Click the magnifying glass to search from a list, or free form type in the component name. If there are more than one component, add the rest the **Other Components** field. This is important to simplify the knowledge search.

e. **Category** * : This field is populated as Problem by default. Open the dropdown to select the appropriate category:
   - **How to**: Provide procedural information on how to do something specific.
   - **Investigation**: Indicate an issue that is currently under investigation but without permanent solution yet.
   - **Problem**: Addresses a customer's specific issue.
   - **Product Enhancement**: To documents a Product Enhancement Request.

f. **Expires on**: Optional field that can be used to remind you that a KBA 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 KBA Information - Expires on section for more information.

g. **Product**: It's important to choose all product(s) that the KBA 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. See Fill in KBA Information – Product and Product Version section in this WIPS.

h. **Bridge KBA**: This field is populated as No by default. If the KBA is a bridge KBA, select the appropriate type from the dropdown list. See Fill in KBA Information - Bridge KBA section in this WIPS.



Back

4. Fill in KBA Information

Knowledge Management

Header & Status Details

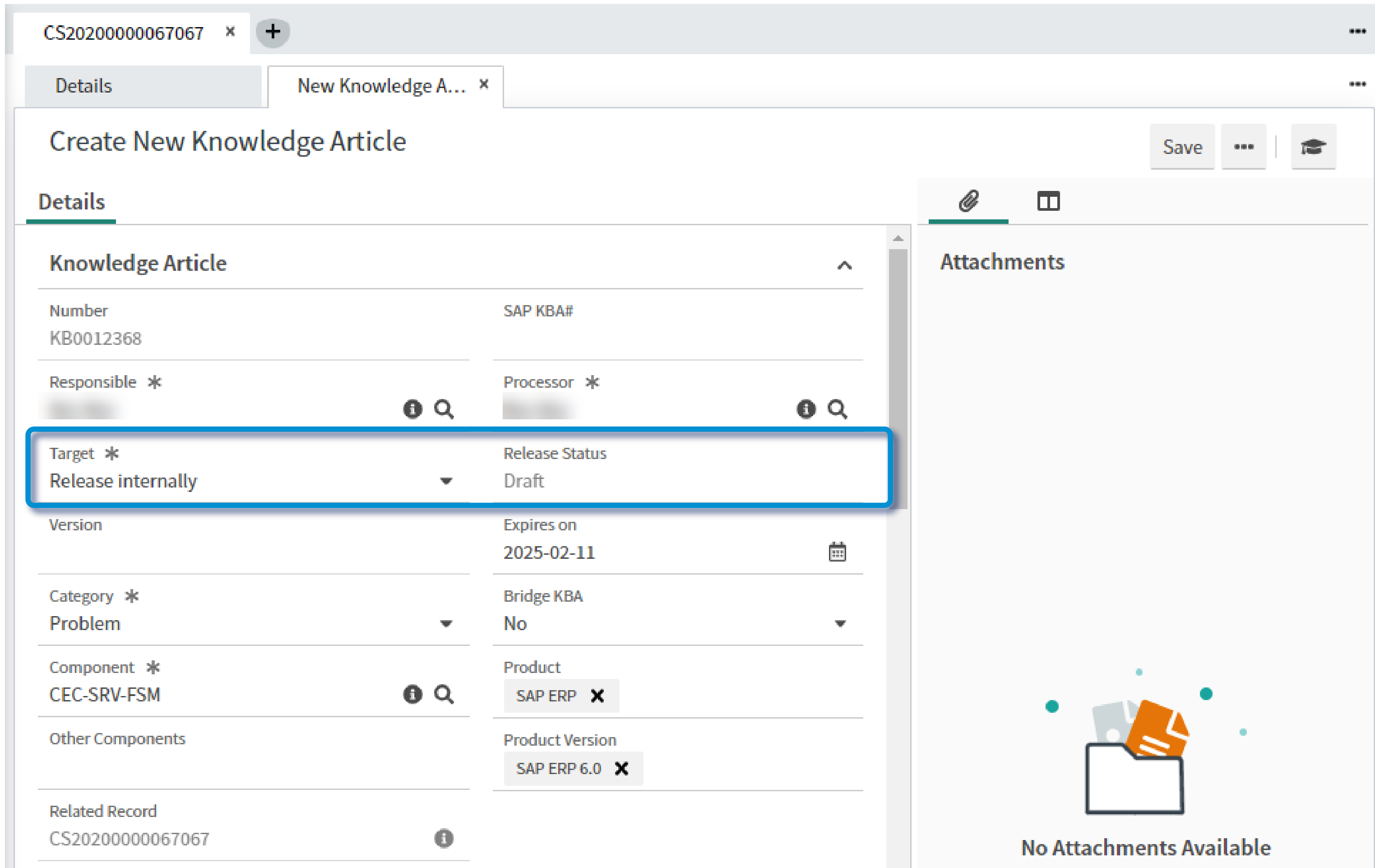
It is important that the Header Data section is filled out correctly because it is used by customers to narrow down their search results and it is used in the internally to run queries.

Mandatory fields (marked by red asterisk *) must be completed before the KBA can be saved. Further detail can be found in KBA – How Tos: Populate the Header Data.

KBA Status

h. **Release Status**: This field displays the workflow progression of the KBA. It is auto-populated and read-only.
   - **Draft**: The initial status of a newly-created KBA or one that is being fixed/edited and represents work in progress. The author can click **Save** to keep working on it in the future. It remains in the author's KBA Inbox. A KBA 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 KBA is considered completed by the author. This status is used when submitting a KBA to a KM Coach for review. Regardless of the KM roles, the KBAs must be reviewed and approved before publishing.
   - **Published**: The KBA is approved for publishing and is accessible to the defined target group.
   - **Pending Retirement**: The KBA has requested for retirement and the approval request is generated automatically. KBAs with release status of Pending Retirement are not viewable by other users or customers anymore.
   - **Retired**: The KBA has been successfully retired and cannot be retrieved, edited, blocked or republished
   - **Outdated**: This status can only be used after a KBA has been published. This status should only be used when a KBA is no longer relevant. See WIPS entry: Update a KBA for more details about when this status can be used.

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



4. Fill in KBA Information

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 KBA can be saved. The KBA Content Standards Guide provides best practices for the text management.

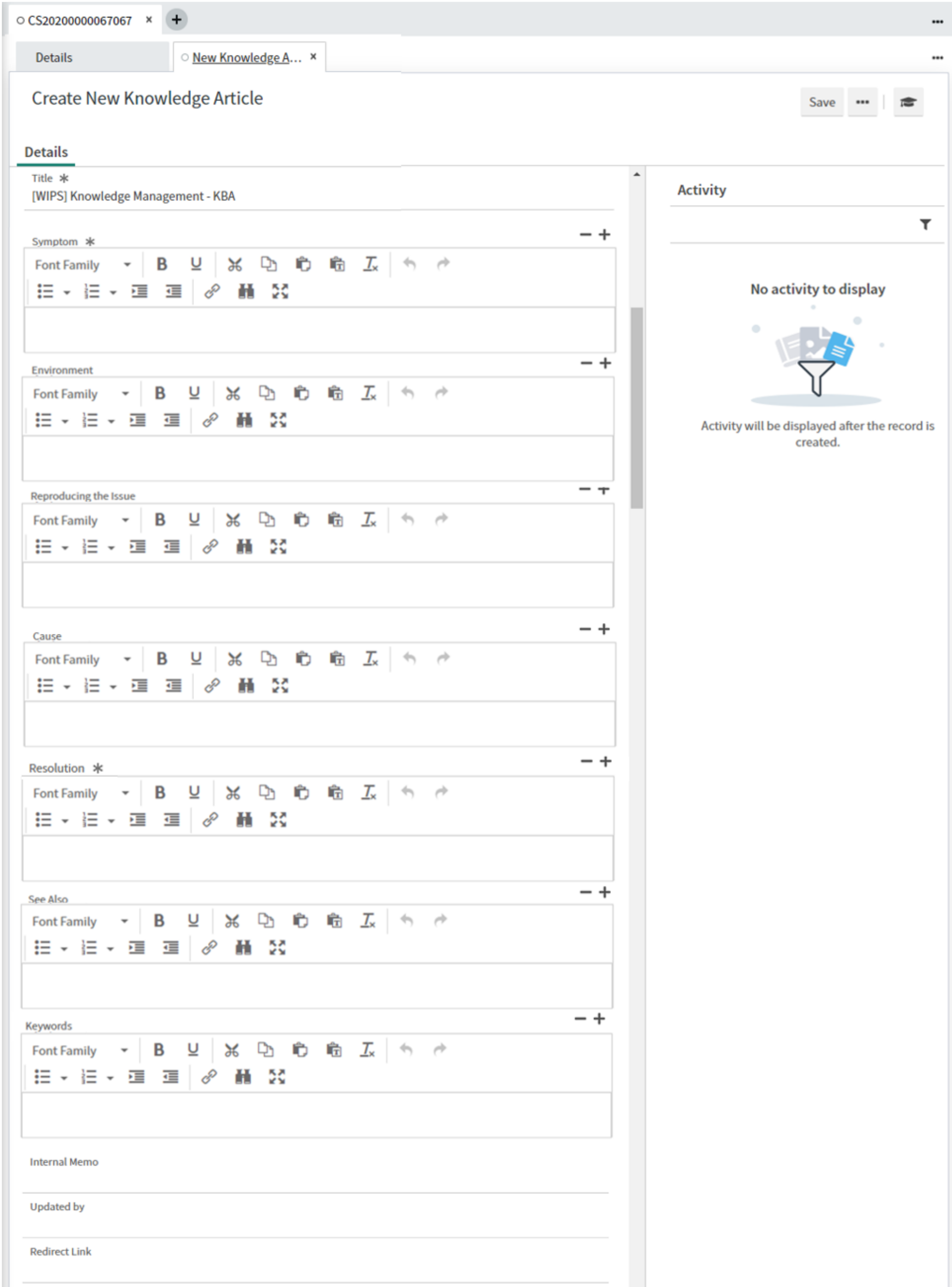
KBA Main Body

- **Title** * : Short description of the KBA 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** (optional): When the information is known, provide the exact steps (workflow) that reproduces the issue. Use a numbered list when providing the exact steps.
- **Cause** (optional): When the information is known, clearly state the underlying cause to help others understand why issues (problems) occur. If the cause is about a product bug, add the appropriate information (if it applies to your product line).
- **Resolution** * : **The Resolution section should never be empty!** The resolution must address the issue/question stated in the symptom section. By following these clearly stated actions, the symptom(s) should disappear after the resolution 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 KBA be more searchable by adding words a customer may 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 KBA. Information posted here is not displayed in the published KBA.
- **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 KBA that has been either replicated into i7 system from ServiceNow.

Full description and how to populate these fields are documented in the KBA Content Standards Guide on the KM WIKI.



Back

4. Fill in KBA Information

Knowledge Management

Other Fields

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

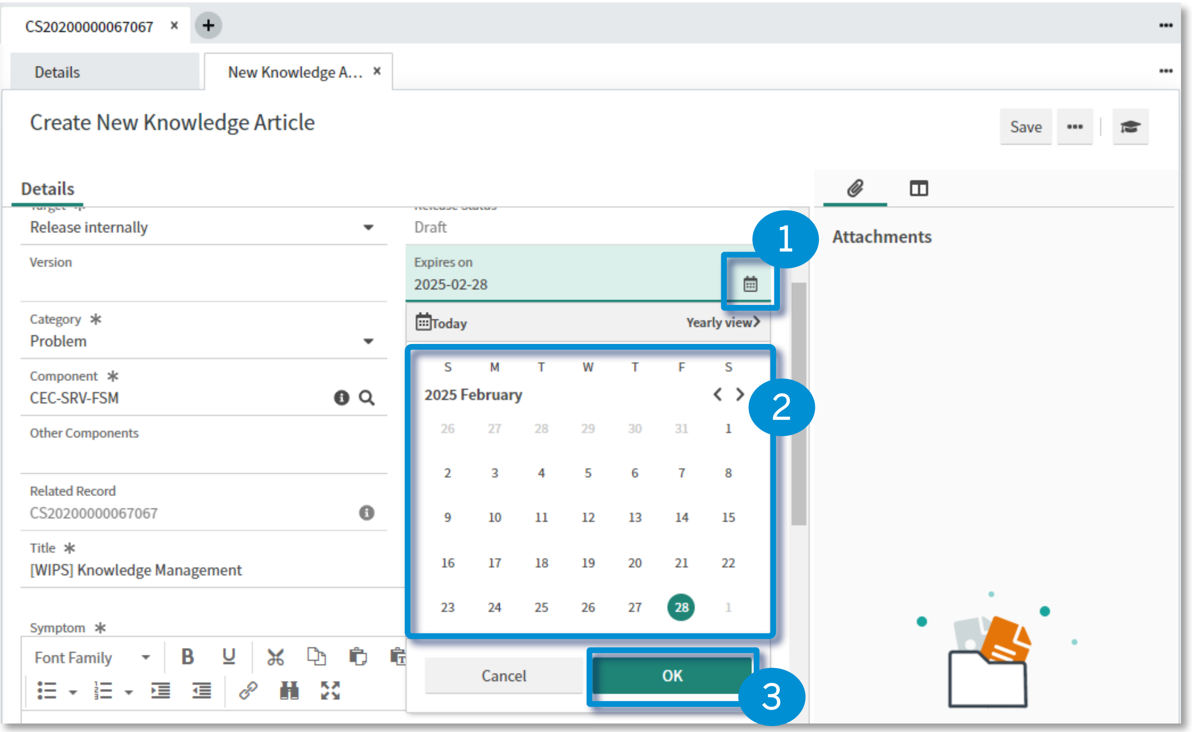
Expires on – When to use it?

The **Expires on** field, is an optional field that can be used to remind you that a KBA 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 KBA.
- Email notification will be sent at these intervals: 4 weeks, 2 weeks, 3 days, and the day when the KBA expires or until the KBA is updated and the **Expires on** date has been changed/removed.
- If the **Expires on** date is met, the system will change the KBA status to **Retired**.

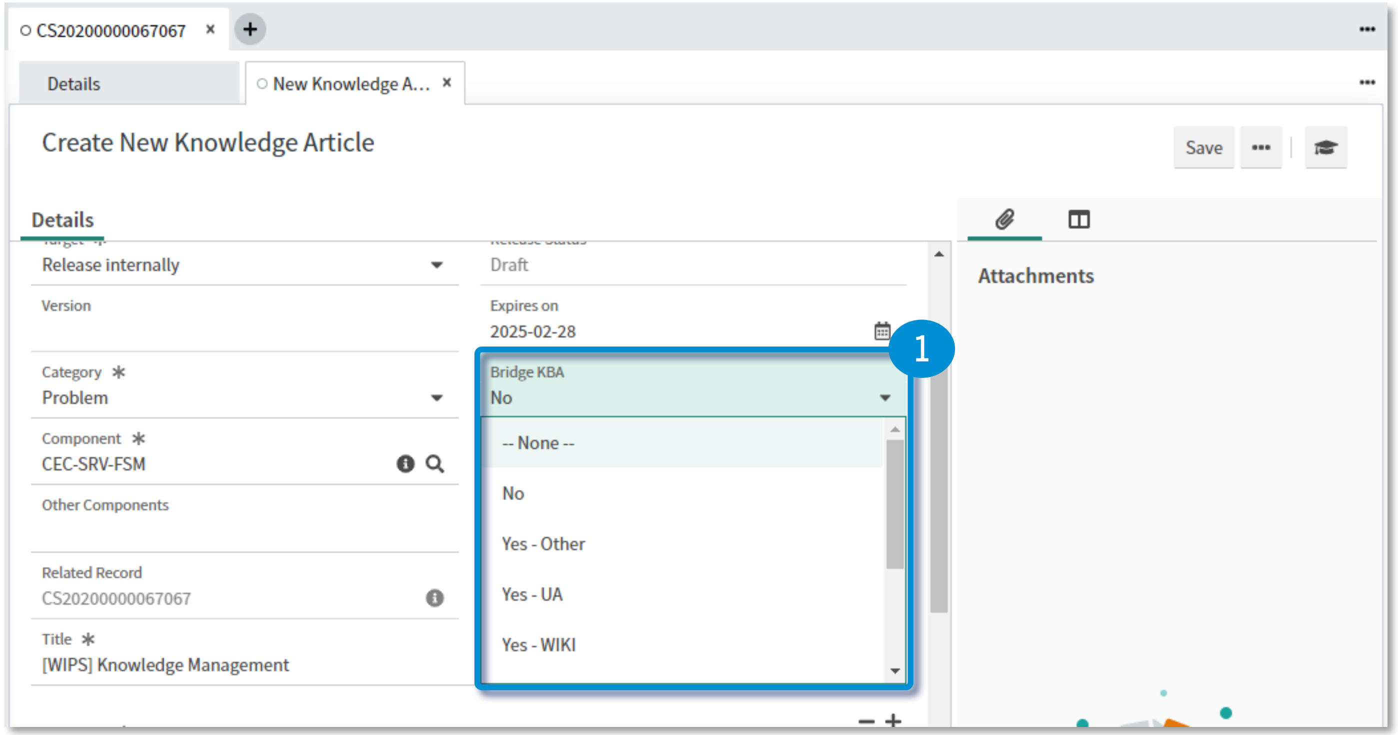


Bridge KBA

A Bridge KBA allows engineers to bridge a gap in searchability or usability of other knowledge repositories for our customers to ensure they can successfully self-serve themselves. A Bridge KBA can hyperlink to an existing knowledge document or repository to make the solution more searchable or usable for the customer.

We add value to the Knowledge Base by adding customer context and using customer words as much as possible.

- The Bridge KBA flag is only used on a KBA that directly refers to a solution in another document type (SAP Note, SAP Community WIKI page, Help Portal document, Guided Answer, 3rd party documentation) but has no specific solution in the KBA itself.
- A KBA with an actual solution that also includes references to other supporting documents (other KBAs, Support Portal pages, etc.) would not be a Bridge KBA.
- More Information can be found on the KM WIKI Bridge KBAs.



Back

4. Fill in KBA Information

Knowledge Management

Other Fields

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

Product and Product Version

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

- Add ALL product(s) to which the KBA applies;
- If the KBA applies to specific product version(s), select the one(s) to which the KBA applies;
- If the KBA can apply to all versions, DO NOT select any version;
- Leave the field blank for generic KBAs not assigned to specific SAP products or versions (e.g. a KBA written about the SAP Support Portal),

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

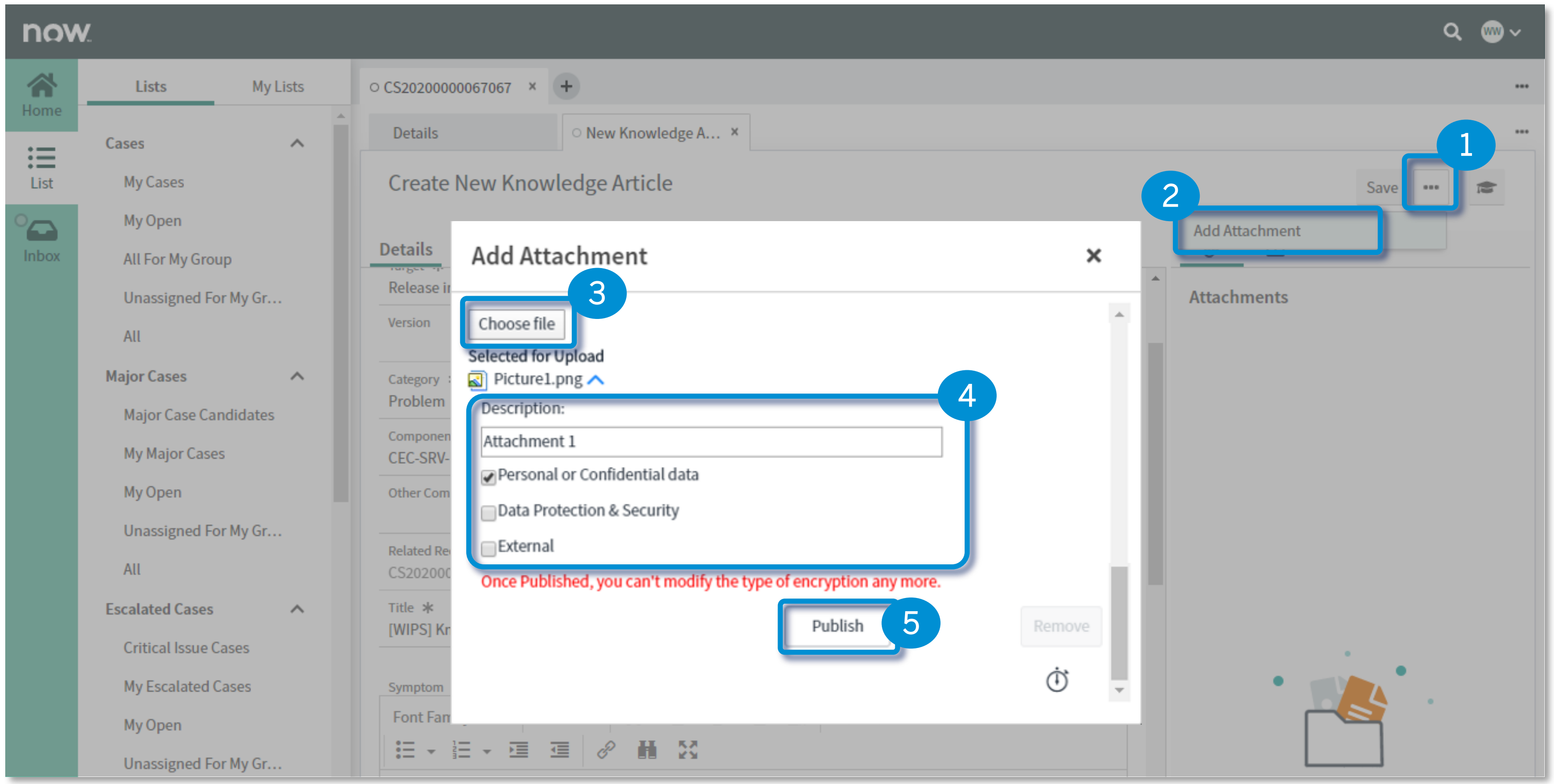
- All versions of a product up to the current version;
- A product, no versions specified (all current, previous and future versions);
- One or more product versions;
- Not restricted to any product or version (generic KBA).

KBA Attachments

Attachments can be added to KBAs to provide supporting details to the KBA.

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

1. Click the **3-dot icon (...)** to expand the UI action list.
2. Click **Add Attachment** to open the attachments window.
3. Click **Choose file** and browse for file that is going to be uploaded as attachment.
4. Once selecting the file, fill in the description of the file and check the data sensitivity box(es) that applies to this attachment for GDPR compliance.
5. Click **Publish** to attach the file(s) to the KBA. Once you've publish this attachment, you are also able to delete the attachment by clicking **Remove**.
6. Once attached, the attachments are displayed in the **Activity** stream as well as in the **Attachment** tab in the sidebar.



Back

5. Request for Publishing

Knowledge Management

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

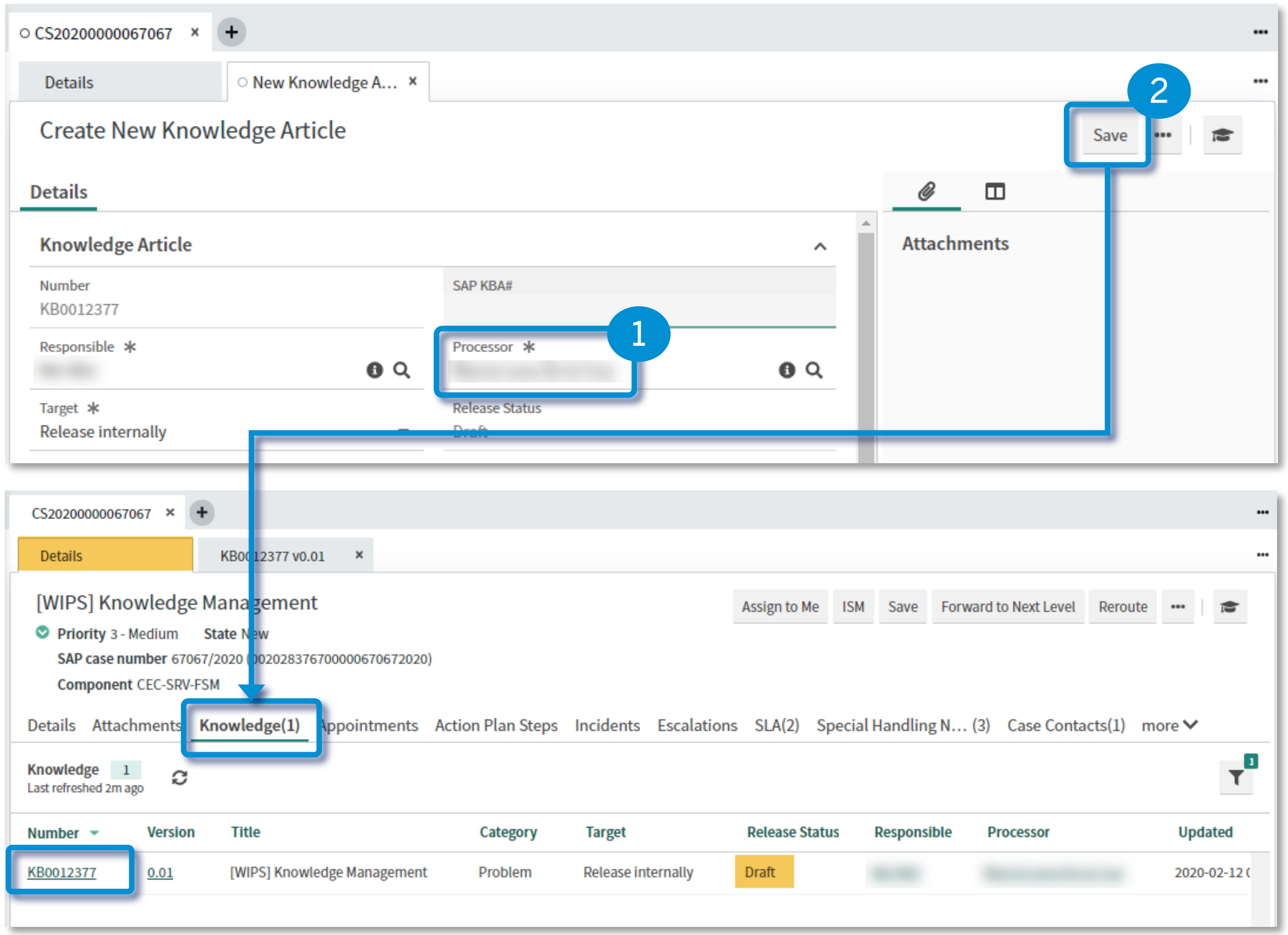
Step 1

Assign your KM Coach to **Processor** field for the approval if applicable.

Step 2

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

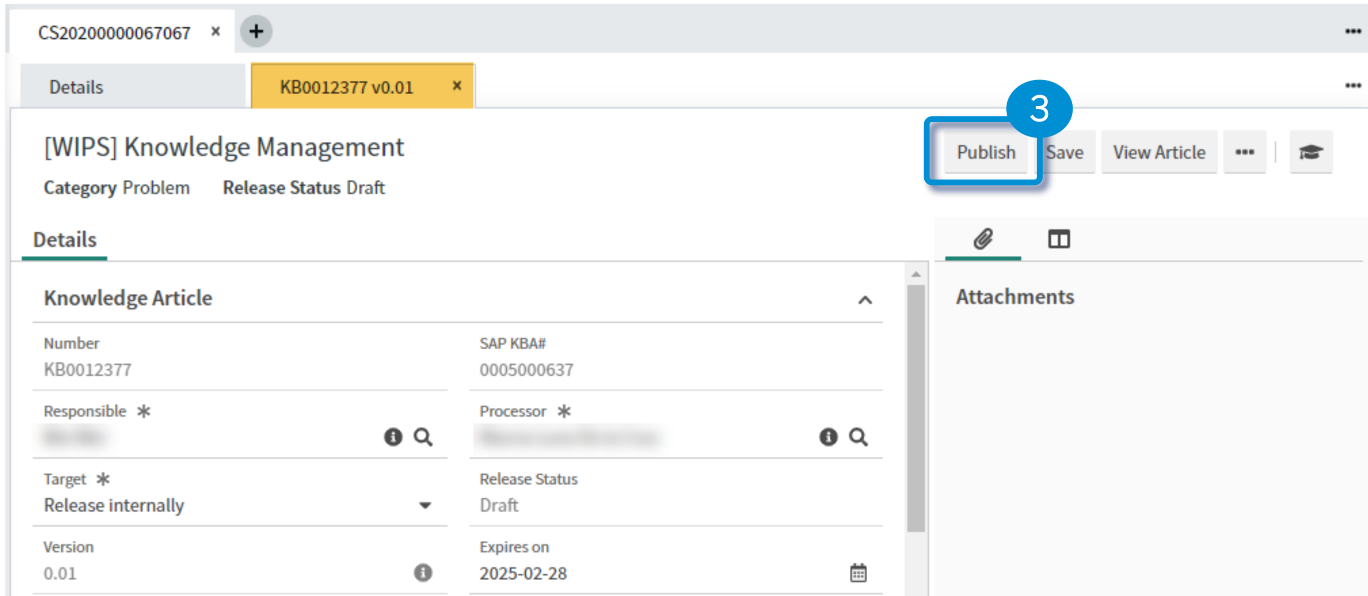
The KBA will be saved as a draft and attached to the parent record (e.g. Case record) in the **Knowledge** tab for Case or **Attached Knowledge** tab for Problem and Incident. If it's not shown, click the **Refresh** button to refresh the record or the page.



Step 3

Once the KBA is saved, click **Publish** in the KBA record to send the KBA draft for review.

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



How to Fill in KBA Information in UI16?

Knowledge Management

How to fill in KBA information in UI16?

Detailed explanations for each of the fields in the KBA can be found here.

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

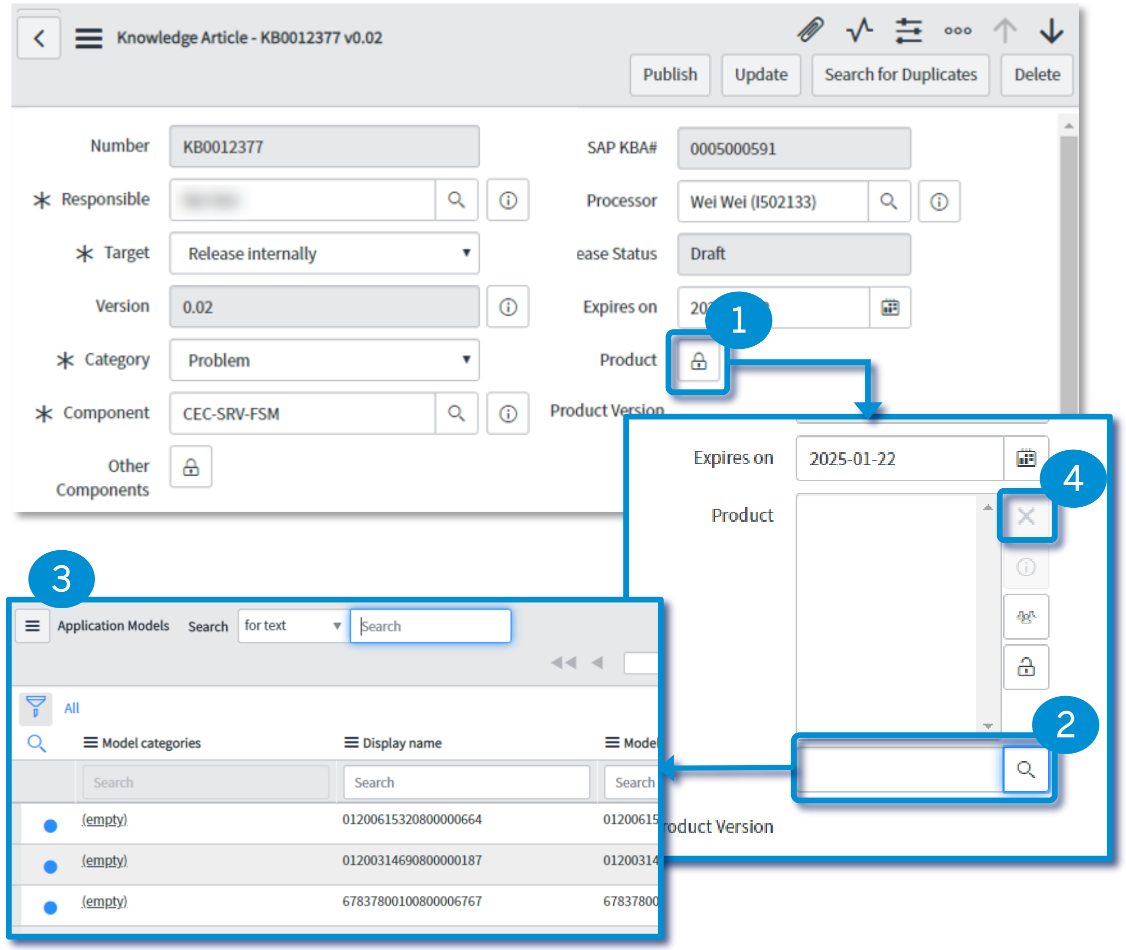
How to unlock and edit the locked field?

The KBA 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 KBA in the new window.
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 KBA form.

NOTE: You should only add ONE primary component that the KBA applies to in the **Component** field. If there are more than one component, add the rest of the components to the **Other Components** field.



Back

How to Fill in KBA Information in UI16?

Knowledge Management

How to fill in KBA information in UI16?

Detailed explanations for each of the fields in the KBA can be found here.

Expires on

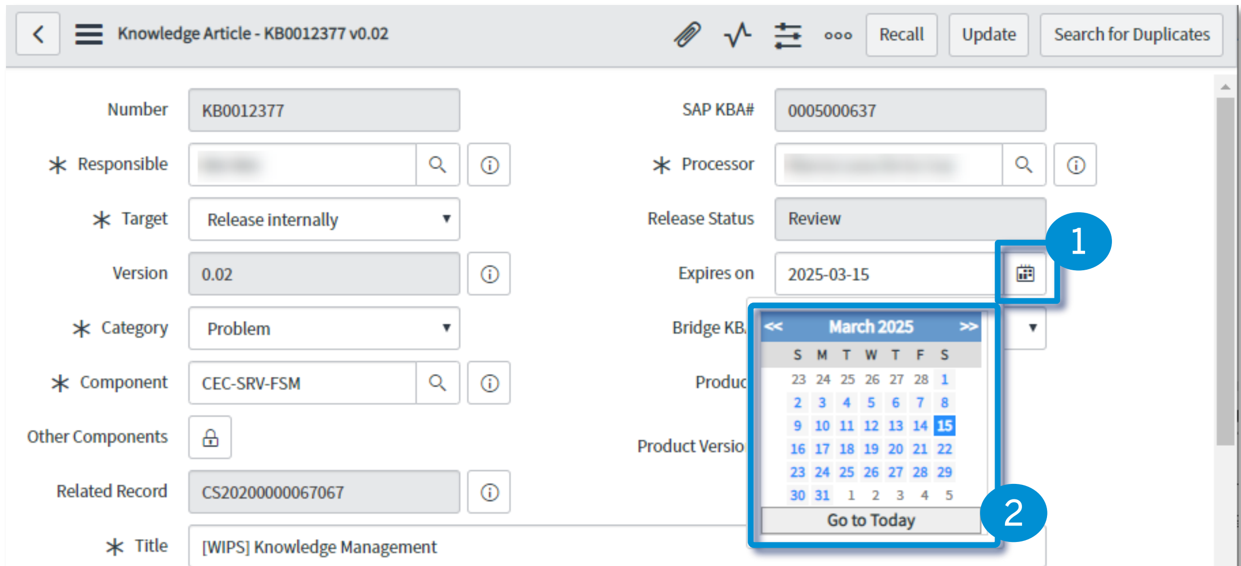
When to use it?

The **Expires on** field is an optional field that can be used to remind you that a KBA 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.

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 KBA.
- Email notification will be sent at these intervals: 4 weeks, 2 weeks, 3 days, and the day when the KBA expires or until the KBA is updated and the **Expires on** date has been changed/removed.
- If the **Expires on** date is met, the system automatically changes the KBA status to **Outdated** and remove the article from customer's view.

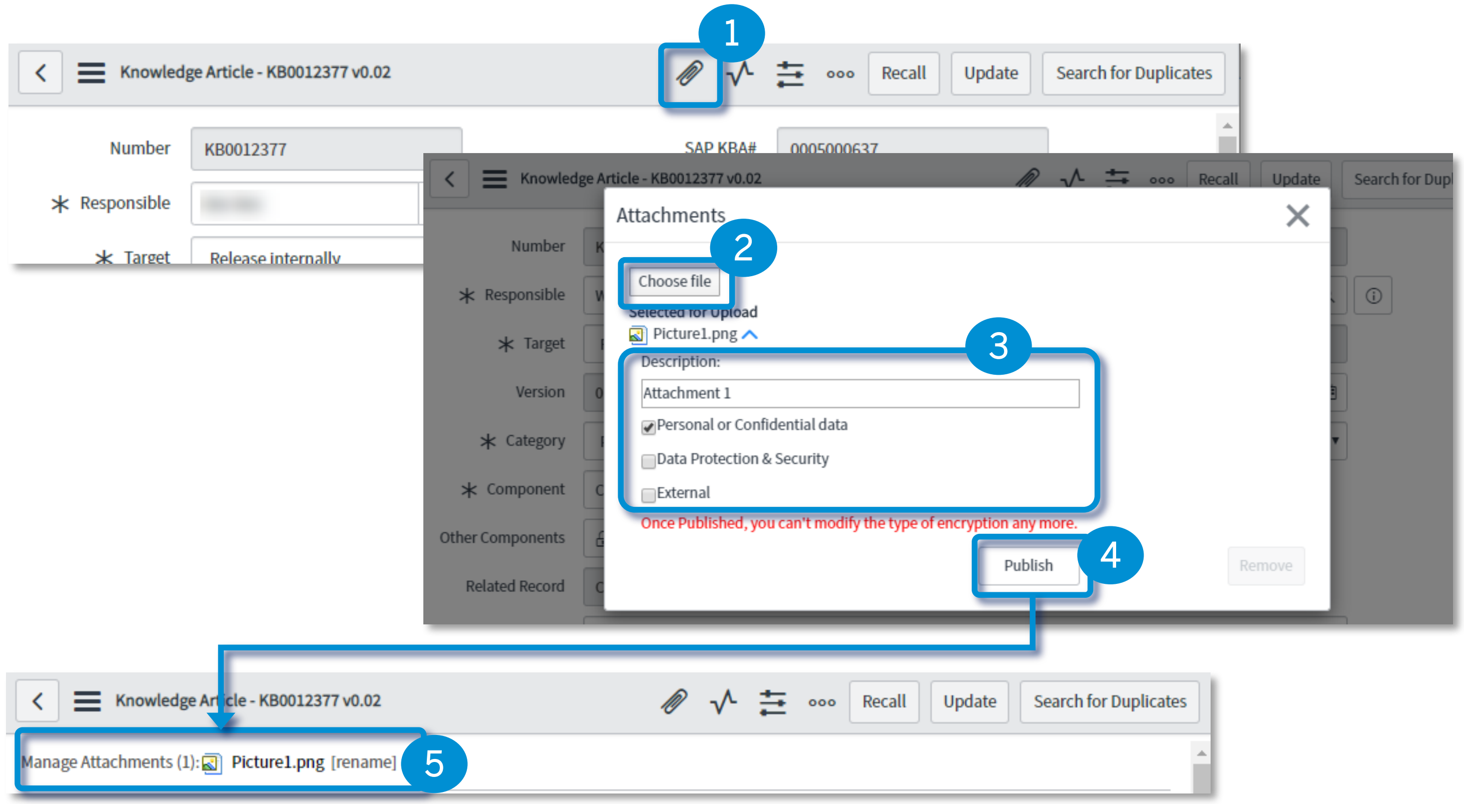


KBA Attachments

Attachments can be added to KBAs to provide supporting details to the KBA.

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

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



Back

How to Fill in KBA Information in UI16?

Knowledge Management

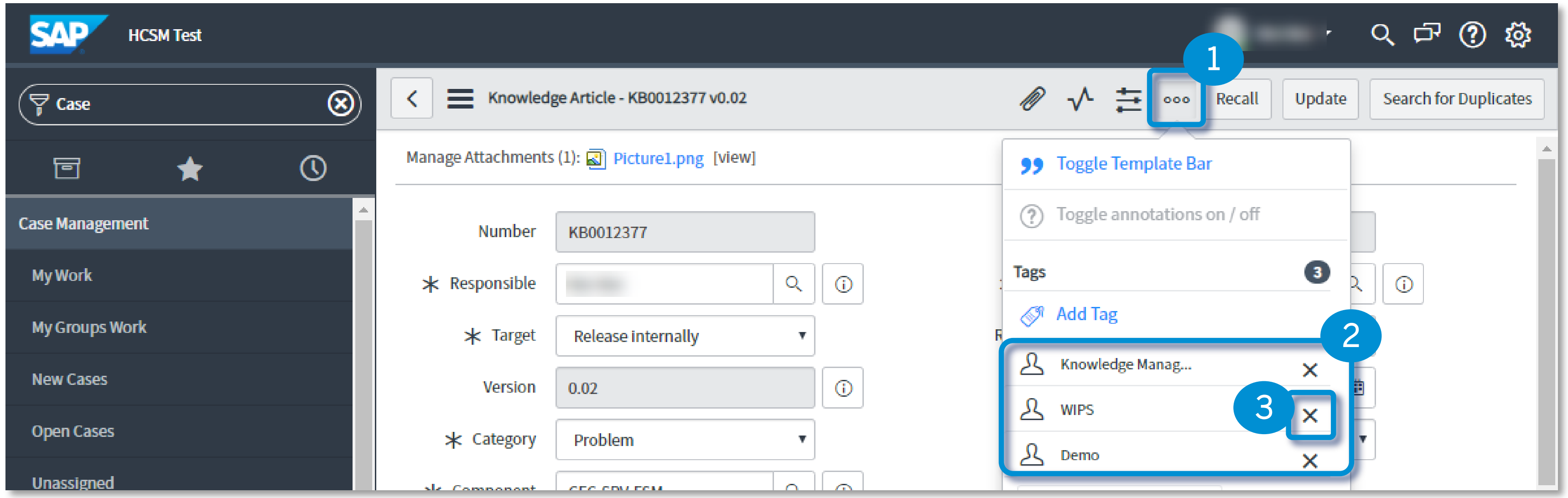
How to fill in KBA information in UI16?

Detailed explanations for each of the fields in the KBA can be found here.

KBA Tags (only available in UI16)

How to review tags on a KBA?

1. Click the **3-dot icon (...)** in the header of the KBA to open the context menu.
2. All tags that have been added to this KBA 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.

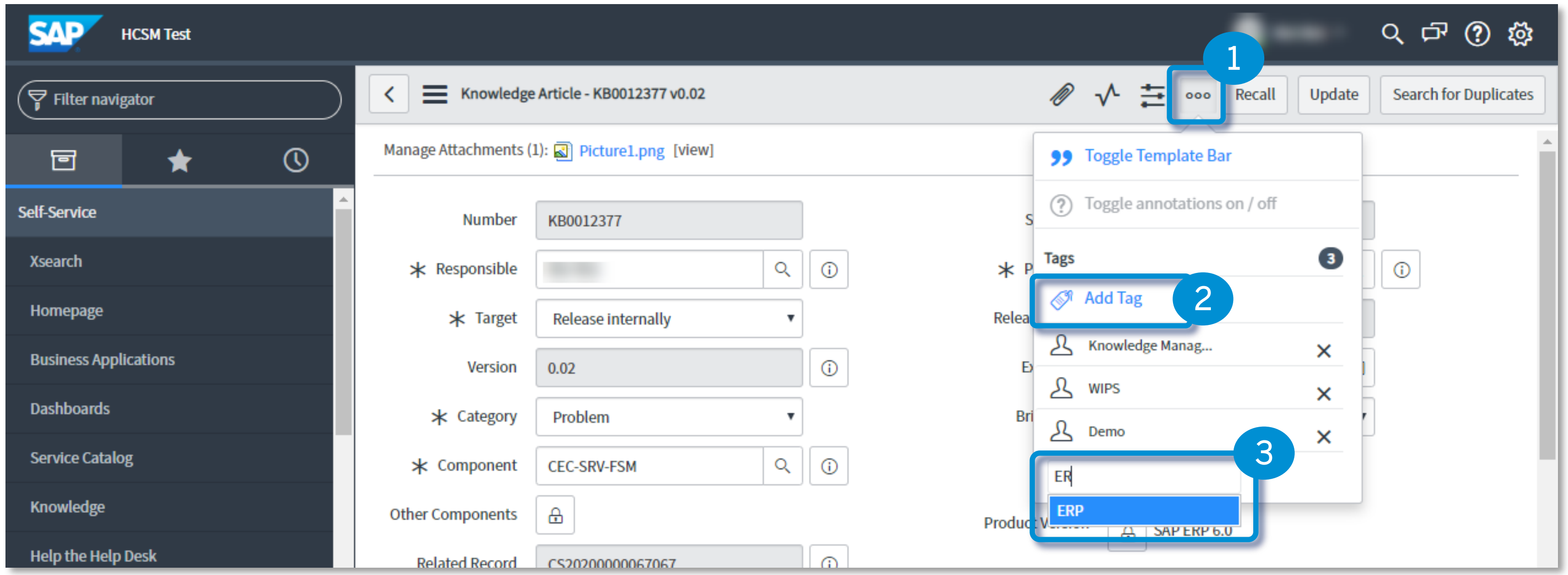


How to add tags on a KBA?

Different from editing the keywords for the KBA, adding tags does not affect the Release Status of the KBA (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 KBA 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 existing matching tags, these tags will 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 KBA record, adding or deleting tags in the KBA does not require republishing. The tags are immediately updated even if the article is currently published. Tags are NOT visible to the customer and are only used internally for filtering and categorization.



Change Log

Knowledge Management – Create a KBA

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
1.1.0	Wei Wei	Mar 02, 2020	▪ Updated steps to create KBA in Agent Workspace ▪ Updated KBA fields (Category, Release Status, Target, Related Record) ▪ Separated KEA and KBA forms and databases ▪ Updated steps to add attachment in both UI 16 and Agent Workspace	Published