

Capstone Project: Task 4 Solution

Update Knowledge Base

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

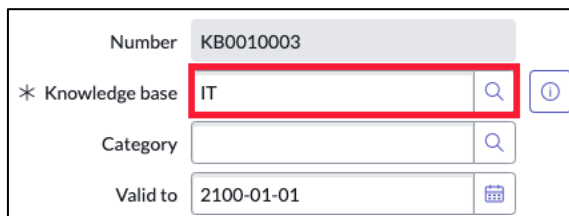
Note: The publishing and retirement processes for a knowledge article are controlled by workflows defined for the knowledge base that the article belongs to. You will enable automatic publishing for the IT Knowledge Base. Refer to **Module 5: Configure Self Service**

A. Enable Automatic Publish

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

B. Create a New IT Knowledge Base Category

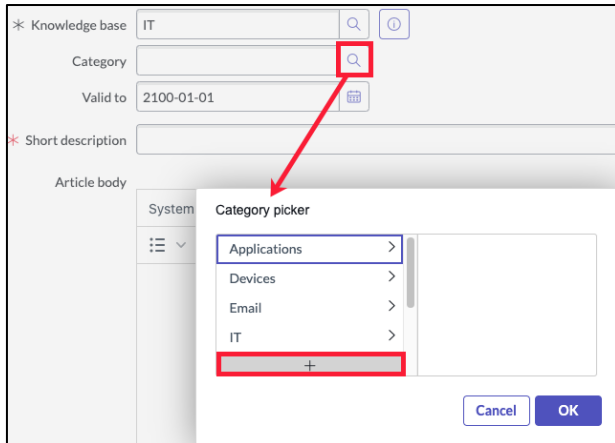
1. Navigate to **All > Knowledge > Articles > Create New**.
2. In the **Knowledge base** field, select IT.



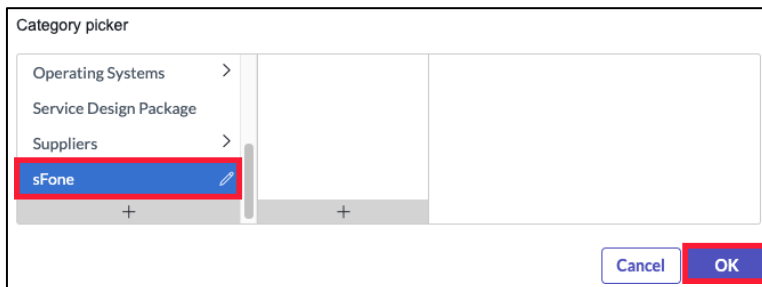
The screenshot shows a form for creating a new knowledge base article. The 'Number' field is set to 'KB0010003'. The 'Knowledge base' field, marked with an asterisk, is set to 'IT' and is highlighted with a red rectangle. To the right of the 'Knowledge base' field is a magnifying glass icon and a help icon. Below it, the 'Category' field is empty with a magnifying glass icon. The 'Valid to' field is set to '2100-01-01' with a calendar icon.

C. Add a new sFone category:

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



3. Type **sFone**.



4. Select **OK**.

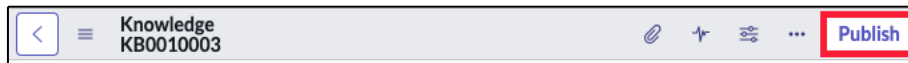
D. Create the Requester Article

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

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

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

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



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

E. Create the Fulfiller Article

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

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

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

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

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

F. Apply Role Security to the Fulfiller Article

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

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

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

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

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

TASK VERIFICATION

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

Knowledge Number Search							Actions on selected rows...	New
All > Workflow = Published								
Number	Short description	Author	Category	Workflow	Updated			
KB0010005	Supporting sFone Service Catalog Requests	System Administrator	sFone	▶ ✓ ⚙ ⚠ ⏸	2022-10-13 11:57:39			
KB0010003	Requesting an sFone from the Service Cat...	System Administrator	sFone	▶ ✓ ⚙ ⚠ ⏸	2022-10-13 11:41:35			

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