Knowledge Management

ServiceNow

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Introducing Knowledge Management

Knowledge Management

Note: *The Knowledge Management functionality changed significantly with the Fuji release. For more current information, see Knowledge Management* [1] *at* http://docs.servicenow.com The ServiceNow Wiki is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

The knowledge management process ensures that important information flows freely throughout the IT department and to the entire organization. For organizations using knowledge centered support (KCS) processes, this information is also part of the incident management and problem management processes. By storing and making available information about common problems and issues, knowledge centered support helps prevent future redundant incidents.

The ServiceNow Knowledge Base application provides role-based tools to create, store, and publish this important information. It also provides tools for all users to find and view the information as needed.

Knowledge Management Roles

Knowledge management uses these roles:

- **knowledge role:** creates and translates articles; reviews and responds to feedback; works with article submissions.
- **knowledge_admin role:** performs all the activities of the knowledge role; reviews and responds to ratings, flagged articles, and user search information; updates the knowledge portal with links to outside resources.
- **admin role:** performs all the activities of the knowledge and knowledge_admin roles; applies role restrictions and other supplementary settings to articles, configures knowledge management properties; manages the label and message text for knowledge forms and pages.

Administrators assign these roles to the users and groups who maintain the knowledge content.

Application and Modules

The Knowledge Base application contains these modules, which are available to all users with the admin, knowledge_admin, and knowledge roles, unless otherwise noted.

Module	Description
Create New	Opens the Knowledge form where you can create a new article. The article number is provided. Enter the content for the article. Users with the admin role can set the article workflow state and assign roles if access is to be limited.
Published	Lists the articles whose workflow state is **Published**. These articles are accessible from the knowledge portal and search. Review or update published articles, as needed.
Edit	Lists all knowledge articles, regardless of their workflow state. Review or update the articles, as needed.
Retired	Lists articles whose workflow state is **Retired**. These articles are not accessible from the knowledge portal or search. Review the articles to determine whether any should be updated and republished, retained for historical reference, or deleted.
Feedback	Lists knowledge feedback records. Use the **Work notes** field on the Knowledge Feedback form to document any changes made as a result of the feedback.
View	Displays the knowledge portal. Search and view articles or click and drag a topic header to temporarily change the arrangement of topics in the portal.
Submissions	
Assigned to me	Lists all knowledge submissions assigned to the logged in user who has the admin, knowledge_admin, or knowledge role. Review the submission to determine whether to create an article and submit it for approval or to reject the submission and note the reason. Submissions are created only when the knowledge submission workflow is enabled.
Open Submissions	Lists all knowledge submissions with **Status** set to **Submitted** or **Assigned**. Review the record to determine whether to assign the submission to a knowledge worker, create an article and submit it for approval, or reject the submission and note the reason. Submissions are created only when the knowledge submission workflow is enabled. To list submissions that have been closed, create a filter by clicking the arrow beside the breadcrumbs..
KCS	
Flagged Articles	Lists articles that have been flagged as incomplete or inaccurate by users. Open the record to read the user's comment in the **Knowledge Feedback** related list and to modify the article as needed. *This module is available only to users with admin or knowledge_admin role.*
Ratings	Lists ratings from users. Click the **Created** date to open the rating record. Click the article number to open the article. *This module is available only to users with admin or knowledge_admin role.*
Search Log	Lists records of knowledge searches showing the search term and the number of results returned. Use this information to determine whether users are finding what they need in the knowledge base. *This module is available only to users with admin or knowledge_admin role.*
Overview	Opens the Knowledge Management homepage. Use the links at the top of the page to add content to the page or change its layout. *This module is available only to users with admin or knowledge_admin role.*
Administration	
Navigation Add-ons	Lets you add links on the knowledge portal to different search engines or related websites. *This module is available only to users with admin or knowledge_admin role.*
Properties	Lets you configure the knowledge base. *This module is available only to users with admin role.*
Messages	Lets you customize the text that appears in various knowledge base locations, such as button labels, category names, and feedback options. *This module is available only to users with admin role.*

Using Knowledge

All users of the ServiceNow application can access the knowledge portal to search, where they can search for and view knowledge articles and provide feedback to help improve the knowledge base. For more information, see Using the Knowledge Base and Searching Knowledge.

Creating Knowledge

You can provide knowledge content:

- By creating new articles in the Knowledge form.
- By linking to content in other knowledge systems.
- From existing incidents.
- From existing problems.
- From the service catalog.
- From events by creating a business rule to generate relevant knowledge.
- By publishing managed documents to the knowledge base

Administrators can enable the knowledge submission workflow to have new knowledge articles created as *submissions* that are moderated by knowledge workers before they are published.

Translating Knowledge

Organizations with knowledge users who speak multiple languages can activate the optional knowledge internationalization features. For more information, see Knowledge Internationalization.

Tracking and Reporting on Knowledge

Several tracking and reporting options withing ServiceNow help you see how the knowledge content is being developed and used over time. For more information, see Knowledge Management Reporting and Knowledge Article Tracking.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/product/knowledge-management/topic/p_KnowledgeManagment.html

Using the Knowledge Base

Overview

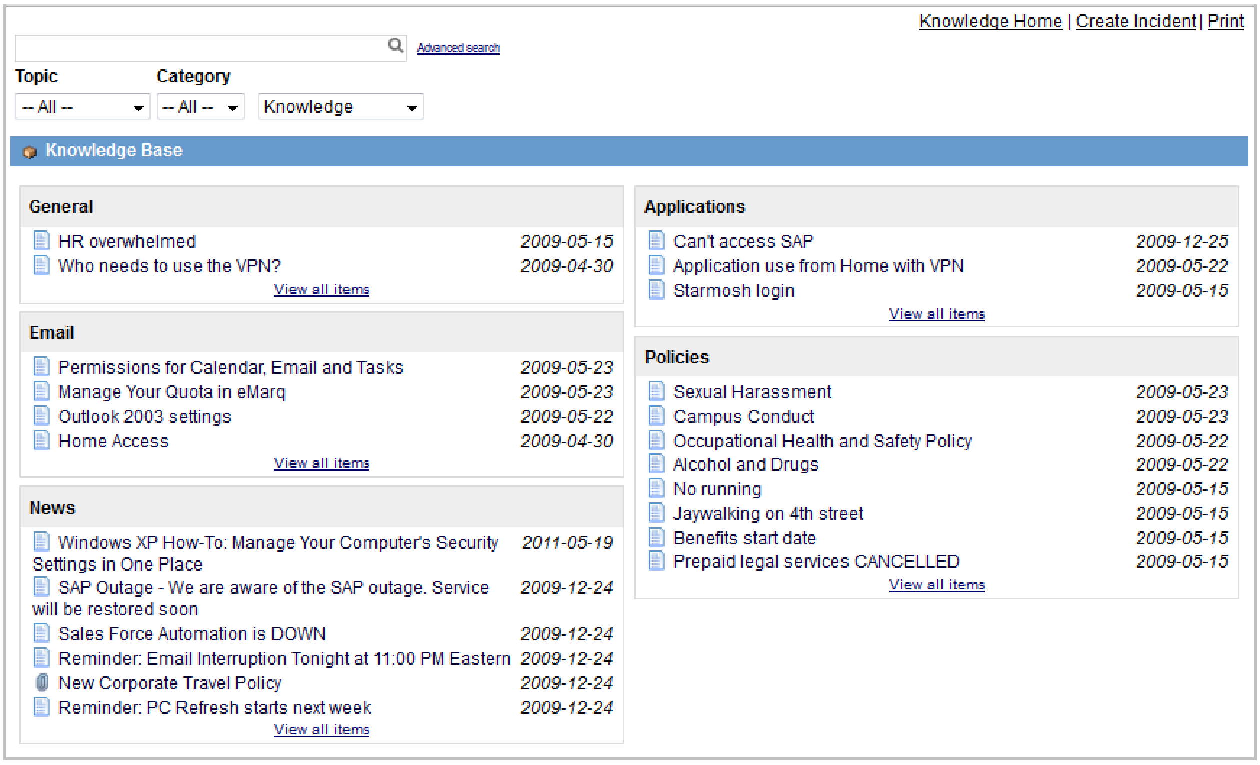
All users of the ServiceNow application can access the knowledge portal to search for and view role-appropriate articles. The specific application and modules available vary by role. The knowledge portal can also be accessed, to view and search for articles, on mobile devices. See Using Knowledge on Mobile for more details.

The separate Employee Self-Service portal allows employees to access knowledge articles outside the full ServiceNow application.

Accessing Knowledge

View role-appropriate knowledge articles from these locations.

- **Knowledge portal:** every ServiceNow user can access the knowledge portal through one of these paths: **Self-Service > Knowledge**, **Service Desk > Knowledge**, or **Knowledge Base > View**. The portal lists the most recent articles arranged by topic.

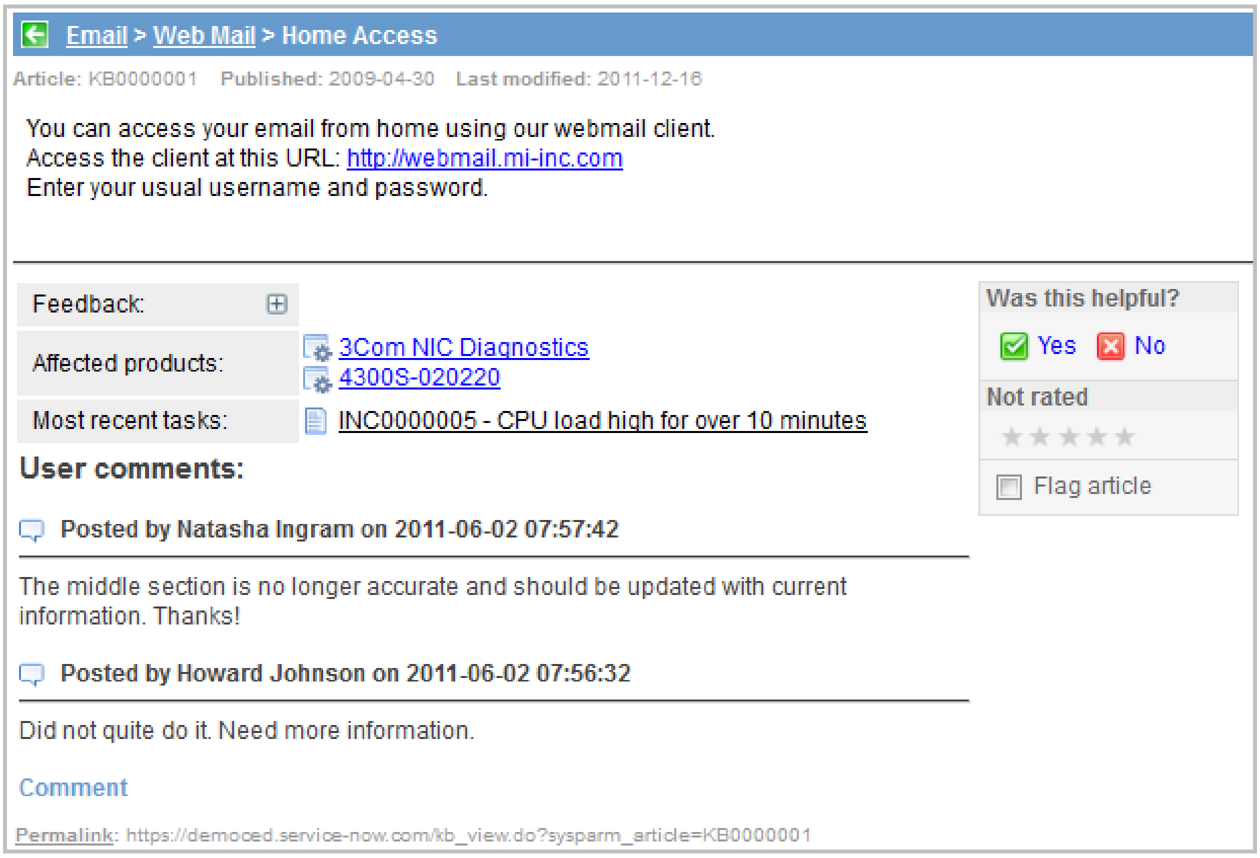


- **Knowledge base list:** users who click a topic's **View all items** link on the knowledge portal see a list of all articles in that topic that have not passed their *valid to* date. Unlike a record list, users cannot alter knowledge base entries with the list editor.
- **Global text search:** users whose roles permit access to global text search can find knowledge articles along with tasks, policies, service catalog items, and other records. Administrators can tailor which tables are searched.
- **Homepages:** each user has a homepage that appears by default, typically filled with reports, selected knowledge topics, and other commonly used functions. Users can personalize and rearrange their homepage based on what information is most useful to them.
- **Content pages:** the knowledge management team can create content pages that serve as a customer interface for the knowledge base.

- **Forms that contain the knowledge icon:** users can click the knowledge icon ( ) that appears in some forms to initiate a knowledge search for the text in the adjacent field. This icon appears by default beside the **Short description** field on the Incident and Problem forms. Administrators can configure other forms to include the knowledge icon, as well.
- **Reporting:** users can easily generate role-appropriate reports on knowledge feedback, development, and usage in a variety of formats. These reports can be scheduled for email distribution, or added to homepages or content pages. Users click a report element for a list of related knowledge articles.
- **Known errors:** problems can be marked as known errors which adds them under **Problem > Known Errors**, providing quick reference. Although items in the **Problem > Known Errors** module are not part of the knowledge base, this information is important to the knowledge centered support (KCS).

Viewing Knowledge Articles

Click a title to view the article.



In addition to the article's content, the page may show these elements, depending on administrator settings:

- Breadcrumbs that show the article's topic and category.
- Article number, date published, and date last modified.
- Feedback area with up to four feedback options and previous user comments, if any.
- List of affected products and related tasks (such as incidents or problems).
- Permalink URL that can be shared to give others quick access to the article.

Searching the Knowledge Base

Find a specific article by searching the knowledge base in one of these ways:

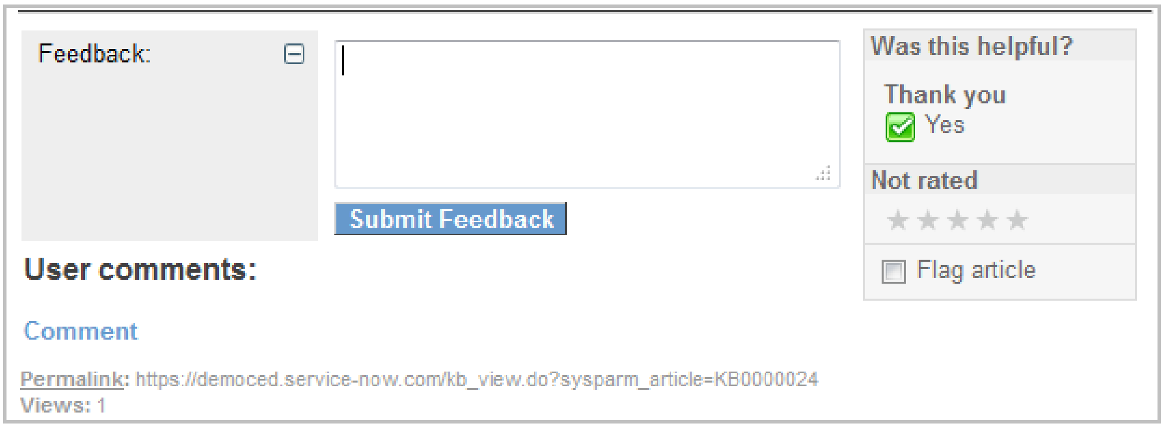
- **Knowledge search:** the search field above the knowledge page searches knowledge articles and their attachments by default. This search, available to all users, lets users filter, organize, and refine search results. Use advanced search to filter search results by topic, category, and search location. Administrators can restrict this function.
- **Global text search:** available to users with role-based permissions, the global text search field in the banner frame searches the knowledge base as well as other types of records to which the user has access rights.
- **Forms:** the search knowledge icon ( ), which appears on some forms, launches a knowledge search for the text in the adjacent field. This icon appears beside the **Short description** field on the Incident and Problem forms by default; administrators may add it to other forms. The search results and articles appear in a pop-up window. You can click the **Attach to Task** button (the word *task* is replaced by the task name) in an article to add information about the article to the associated task record.
- **Content pages:** created with the Content Management System (CMS), content pages can include knowledge search options.

Note: *Knowledge search terms are stemmed* [1]*, meaning that searches may return similar words.*

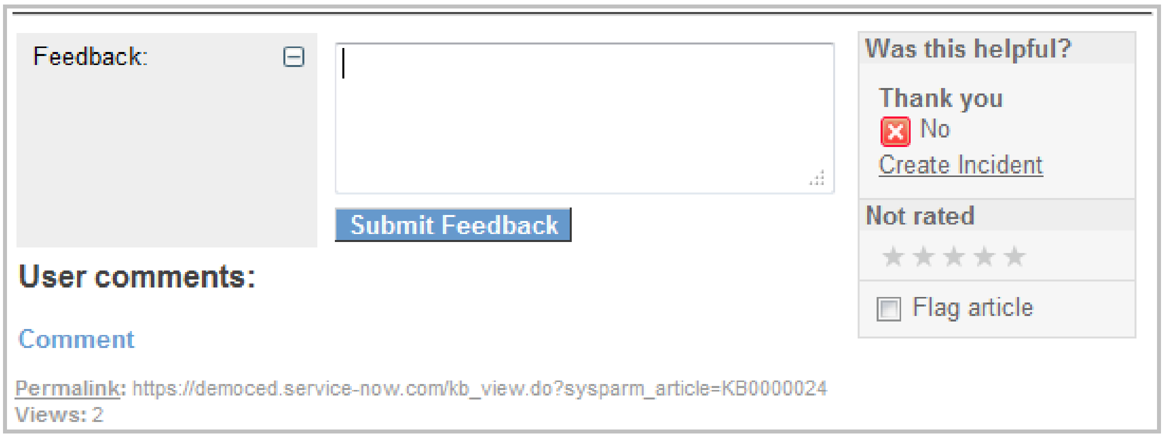
Giving Article Feedback

One or more feedback options may appear at the bottom right of the article, depending on administrator settings. Each option permits a specific type of feedback.

Responding **Yes** to the "Was This Helpful?" question displays a Thank You message and opens the feedback field. Enter comments if desired.



Responding "'No"' to the same question displays a Thank You message and opens the feedback field. This selection may also display a **Create Incident** link, depending on administrator settings.



Clicking the **Create Incident** link creates an incident record that contains the knowledge search that led to the article.

In the five-star rating area, move the mouse over the stars to display a rating preview in the header. Click a rating to select it.

Select the **Flag article** check box to call the article to the attention of the knowledge management team. Selecting the **Flag article** check box makes the **Feedback** field mandatory. Enter comments to help the knowledge management team update the article appropriately.

Enhancements

Dublin

- Knowledge article searching and browsing is supported for mobile devices. See Using Knowledge on Mobile for more details.

References

[1] http://en.wikipedia.org/wiki/Stemming

Searching for Knowledge

Overview

The knowledge search lets all users search the ServiceNow knowledge base for specific articles or topics and then filter, organize, and refine search results, depending on administrator settings. Use the **Advanced search** link to filter search results by topic, category, and search location.

By default, only published articles that have not passed their *valid to* date appear in knowledge searches for most users. Draft and review articles appear to users with role-based permissions. Administrators can change the roles that see draft or review articles, as needed.

In addition to the search options above the knowledge portal, you can search the knowledge base from:

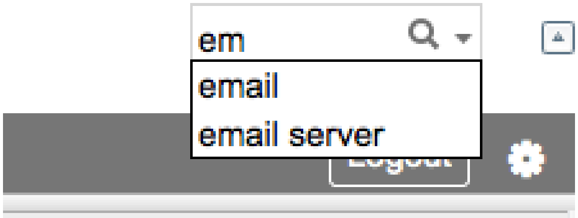
- **Global text search:** available to users with role-based permissions, the global text search field in the banner frame searches the knowledge base as well as other types of records to which you have access rights.
- **Forms:** the knowledge icon ( ) appears beside certain fields. Click the icon to launch a knowledge search for the field's text. The search results appear in a pop-up window. This icon appears beside the **Short description** field on the Incident and Problem forms by default; administrators may add it to other forms.
- **Content pages:** created with the Content Management System (CMS), content pages can include knowledge search options.

By default, knowledge searches also search the contents of attachments. Administrators can enable or disable this feature. Knowledge search terms are stemmed [1], meaning that searches may return similar words.

Search Suggestions

Type-ahead suggestions

The knowledge base and global text searches provide suggestions as you type. Type-ahead suggestions appear under the search box. Suggestions are based on similar searches that begin with the same characters.

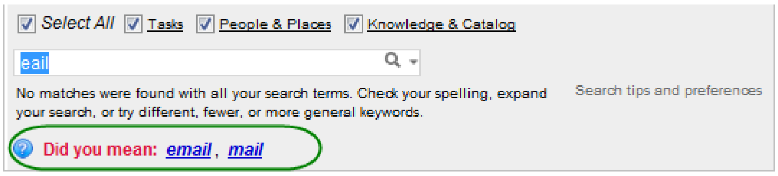


Type-ahead search

"Did you mean?" suggestions

The knowledge base and global text searches provide “Did you mean?” suggestions. Suggestions appear if your original search does not return any results and an alternate spelling or similar recent search does. For example, if you misspell a search term (such as *eail*), the correct spelling (*email*) may appear as a suggestion. Suggestions appear beneath the search box on the results page.

Note: *Administrators must enable the "Did you mean?" properties for users to see these suggestions.*



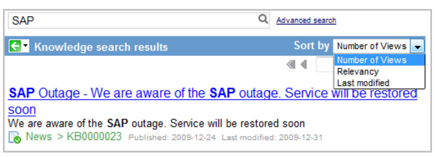
Did you mean? suggestions

For more information about suggestions, see Global Text Search Suggestions [1] on the ServiceNow Community.

Sorting Search Results

By default, knowledge search results are ordered by view count (**Number of Views**) only - the article with the highest view count appears at the top, and so on. The articles viewed most frequently over the past 30 days (default) appear at the beginning and the least viewed articles appear at the end. Administrators can modify the time period considered when sorting by view count.

Select an option from the **Sort by** field to sort by relevancy or by date modified, rather than view count.

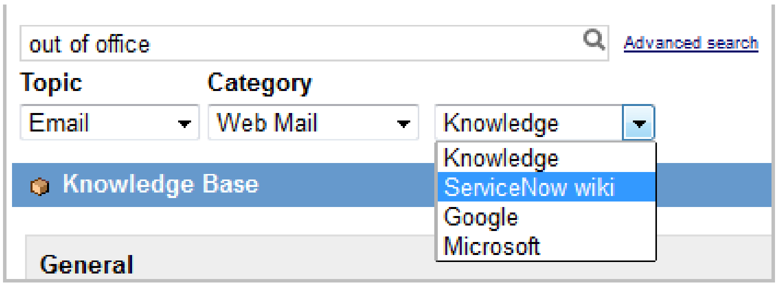


Note: *The selected* ***Sort by*** *option is the only sorting factor applied; the other factors are not considered for secondary ranking. For example, if you select* ***Relevancy****, and the search returns several results with the same relevancy values, the* ***Number of Views*** *or* ***Last modified*** *values are not considered when ordering these same-value results.*

Refining Search Results

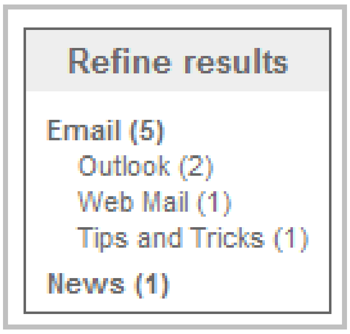
Refine search results with the **Advanced search** link and the **Refine results** box on the search results page. Availability of these options depends on administrator settings.

- **Advanced search:** use the advanced search options to filter results by topic and category, and to search sources other than the knowledge base, such as the ServiceNow Wiki or Google. By default, these options appear when you click the **Advanced search** link beside the knowledge search field.



Advanced Search

- **Refine results:** click a topic or category in the **Refine results** box to see only articles in the selected topic or category.



Refine search results

After refining a search, you can either refine it further or return to search all articles:

Refine further or return

Searching Knowledge from Forms

The knowledge search icon ( ) appears beside the **Short description** field on the Incident and Problem forms by default. Administrators can add the icon to other fields and forms and customize the search function.

You can search or edit the knowledge base form in the following ways:

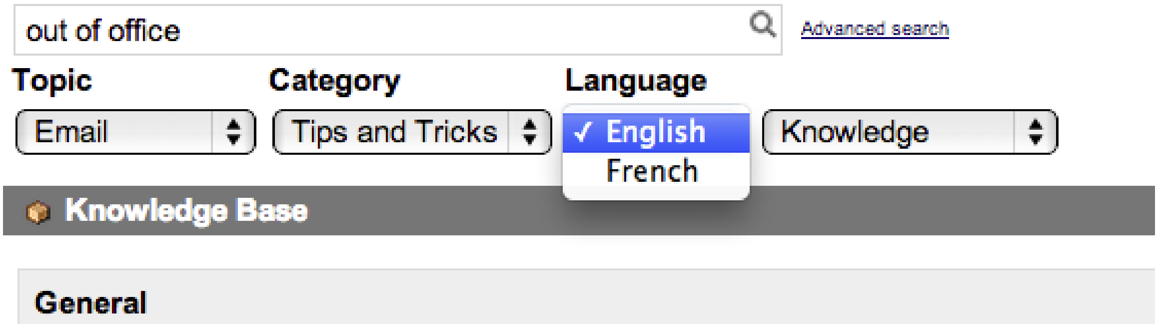
- Click the knowledge search icon ( ) to search the knowledge base for the text in the associated field. Search results appear in a pop-up window, eliminating the need to navigate away from the current page. The pop-up results window offers the same options for refining the search as the standard search results page.
- When viewed from the pop-up window, the article view includes an **Attach to Task** button; the button name changes to reflect the active form. Click this button to attach the article to the current incident, problem, or other record. Other users who open the same record can refer to the attached knowledge articles, as needed.

- Users with the admin or knowledge_admin role can click the **Edit Article** button to open the article's Knowledge form.

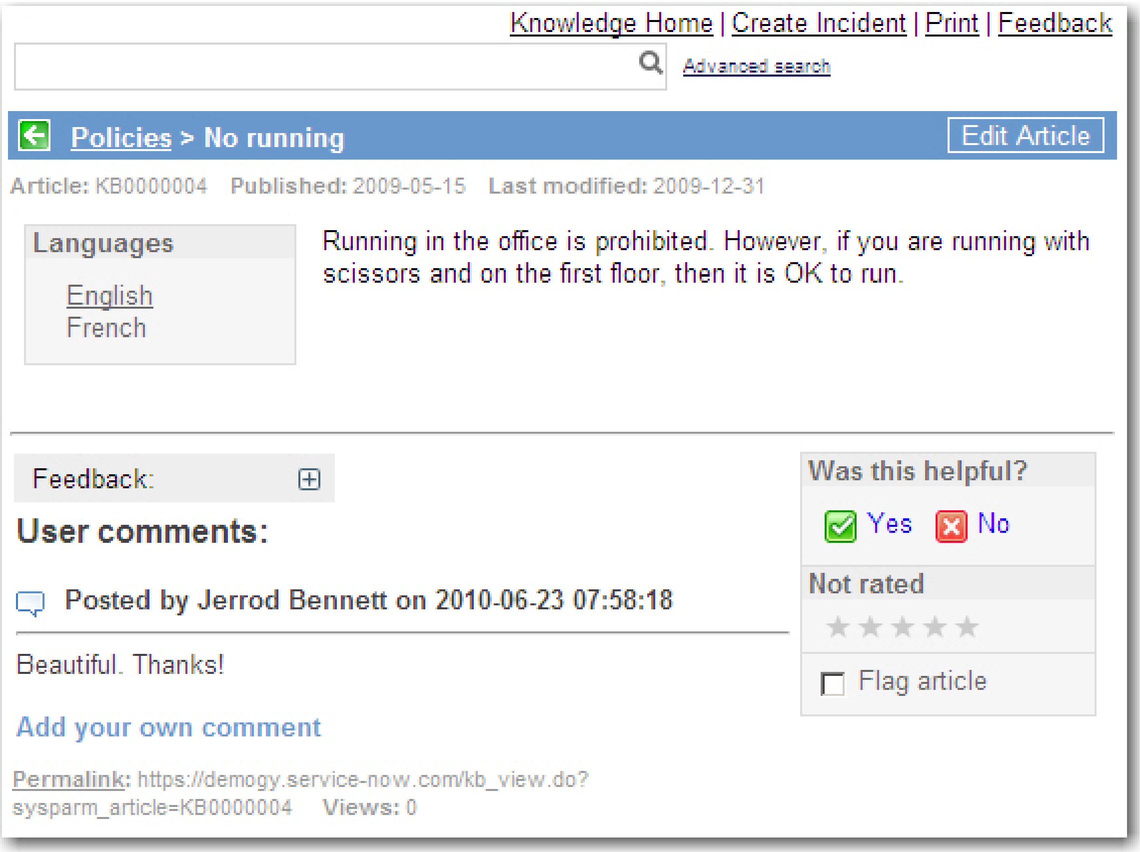
Using Language-Based Knowledge Searches

If knowledge management internationalization is active in your instance, advanced search includes a **Language** option. Select a language to search the knowledge base for articles in that language.

Note: *The language selection applies only to knowledge searches.*



If more than one translation of an article is available, the **Language** box appears in article view. Click a language link to display the article in the selected language.



Searching with International Character Sets

Zing indexes the full range of Unicode characters to provide i18n support for searches.

How Zing Analyzes Characters

For Zing indexing and queries, documents are treated as a sequence of words. Words may be a single character (typical for Chinese and Japanese pictograms), or they may be space-separated sequences of letters (typical of Latin, Arabic, and Pinyin languages).

When dividing a document into words, Zing uses the following rules to interpret Unicode characters.

- **Punctuation**: Some punctuation and symbols are indexed in special cases (see How Punctuation Affects Search Results). In all other cases, punctuation characters are converted to spaces. Spaces define the basic unit of word separation.
- **Pictograms**: Each Chinese or Japanese pictogram is indexed as a separate word (as if it were a single Latin-1 character surrounded by spaces).
- **Letter**: All other characters (such as Latin-1, Arabic, or Pinyin) are individual letters of space separated words. Sequences of letters define indexable words.

Wildcards and i18n

Wildcard text searches (with "*" and "%") are only effective with multiple character words. A wildcard within a sequence of pictogram characters returns too many options for an efficient search. Wildcards are best used with letter-based words.

Stemming and i18n

During queries, search terms that are not part of phrases (not enclosed in quotation marks) are generalized to their "stemmed" word. Stemming removes a variety of common inflections, such "-s", "-es", "-ing", or "-ed". All words with a common stem are treated as synonyms of the original search term. Zing uses the Porter stemmer [1], which is most effective for English text.

References

[1] https://community.servicenow.com/community/blogs/blog/2014/09/24/global-text-search-suggestions

Generating Knowledge Content

Creating Knowledge

Overview

The ServiceNow knowledge base houses the information an organization needs to keep and share. For example, it might include desktop support information, company/department processes and procedures, and documentation on internally developed applications.

Users can add information to the knowledge base by:

- Creating articles manually.
- Creating articles automatically from an incident.
- Creating articles automatically from a problem.
- Creating articles automatically from events.
- Linking to or importing content stored in another knowledge base.
- Publishing managed documents to the knowledge base

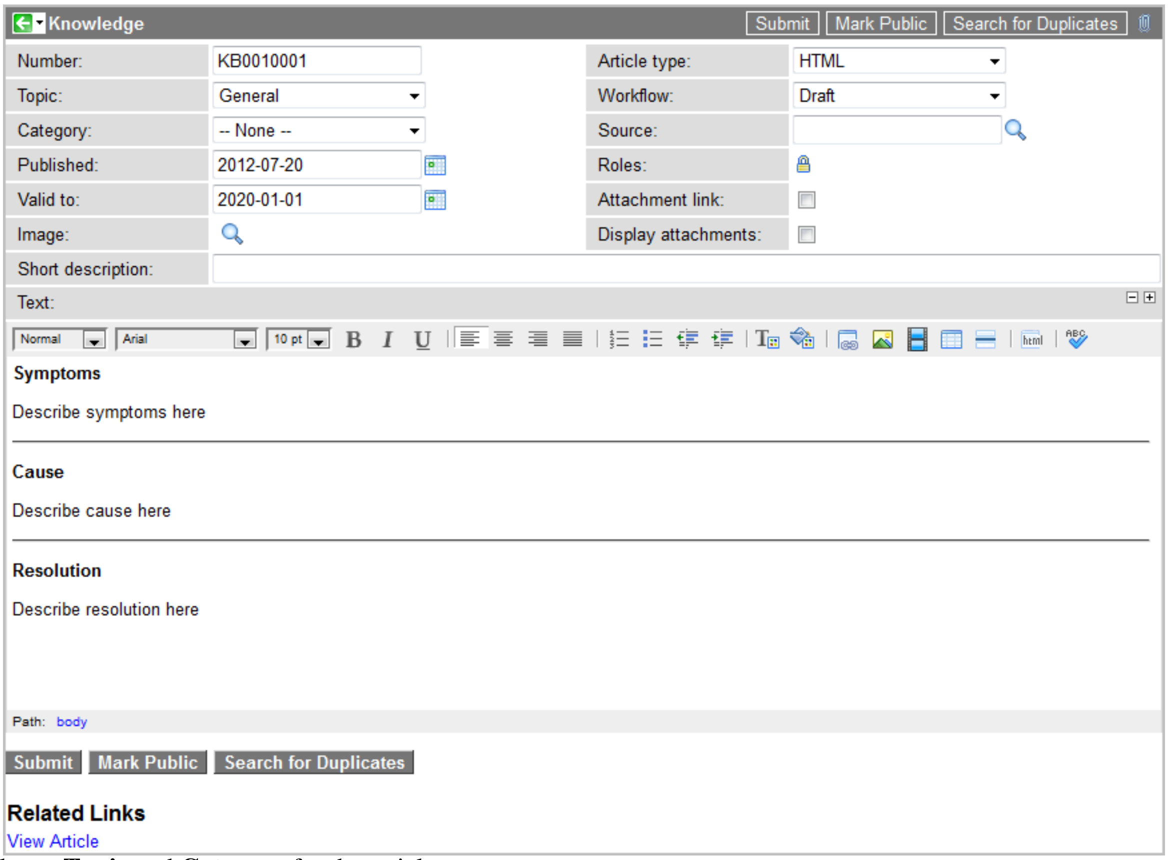
By default, most new articles are created as drafts and move through a review state before they are published. Some exceptions to the standard workflow include posting news from the Problem form and creating an article from an event.

If the administrator enables the optional knowledge submission workflow, articles created from incidents or problems become *knowledge submissions*, which are processed through a different path. For more information, see Knowledge Workflow.

Creating Knowledge Manually

Users with the admin, knowledge_admin, or knowledge role can create knowledge base articles directly in the Knowledge form.

1. Navigate to **Knowledge Base > Create New**.



2. Select a **Topic** and **Category** for the article.
3. Enter a **Short description** to identify the article in the knowledge portal and search results.
4. In the **Text** field, enter the article's content.

   Use HTML or Wiki Markup to format the content, according to the **Article type** selection.
5. Fill in other fields on the form, as appropriate (see table).
6. Click **Submit**.

This table describes all fields and buttons on the Knowledge form. Some fields are available only to users with specific roles.

Field	Input Value
Number	Do not modify. The record number is assigned by the system and should not be changed.
Topic	Select the topic in which the article should appear in the knowledge portal. To add options, right-click the field label and choose **Personalize Choices**.
Category	Select a category to further organize articles in the knowledge portal. Available categories depend on the selected topic. To add options, right-click the field label and select **Personalize Choices**. When adding new categories, each category must have a parent topic.
Published	Enter the date the article was published. The current date is used by default.
Valid to	Enter the date when the article expires. Only **Published** articles within the valid date range are visible to most users. ServiceNow supplies a default date. To change the default date, modify the dictionary entry.
Image	Click the reference lookup icon ( ) to select an image that was previously uploaded to the ServiceNow database. The image appears as an icon beside the article name in the knowledge portal.

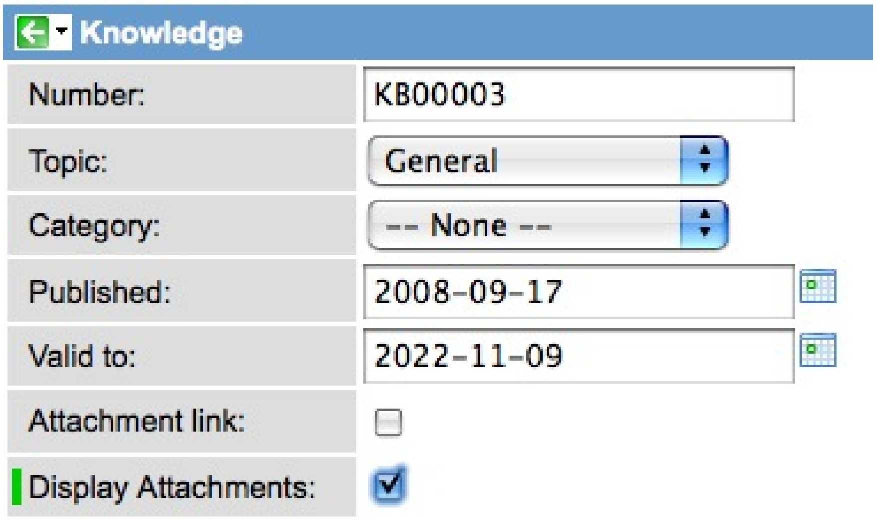
Article type	Select the markup language to use for formatting the article: • **HTML:** the **Text** field offers a WYSIWYG interface with a toolbar to apply formatting and create links. Click the HTML icon on the toolbar to display HTML mode, where you can view and format with HTML commands. • **Wiki:** the **Text** field offers **Wikitext** icon that toggles between a preview of the formatted text and an edit field where you can enter text with Wiki markup language to define formatting.
Workflow	Select the workflow state for the article: **Draft**, **Review**, or **Published**. Generally, only **Published** articles appear in the portal. Users with role-based permissions might also see articles in the draft or review state in the portal and search results, depending on administrator settings.
Source	Click the reference lookup icon to select the task that formed the basis for this article, if any.
Roles	Specify user roles to limit who can view the article. Otherwise, all users can view the article after it is published.
Attachment link	Select this check box to have this article's link open a file attachment. To upload the attachment, click the paperclip icon in the upper right corner. The link in the knowledge portal or search results opens the attachment instead of navigating to the text of the article. You can link to one attachment per article.
Display attachments	Select this check box to display a list of attachments below the article. Although you can link to only one attachment (see the **Attachment link** field), you can attach multiple files and list them below the article in article view.
Short Description	Enter text to appear as a title for the article in the knowledge portal and search results.
Text/Wiki	Enter the text of the article. This area accepts either HTML or Wiki Markup, according to the selected **Article type**. If **Article type** is **HTML**, you can work in WYSIWYG mode, using the toolbar above the text field to apply formatting and create links. Click the HTML icon on the toolbar to open HTML mode, where you can view and format the text with HTML commands. See Using HTML Fields for information on using the HTML editor. If **Article type** is **Wiki**, click the **Wikitext** icon to toggle between an edit field and the formatted text. See Knowledge Management Wiki Support for information on using wiki tags.
Update	Click the **Update** button to save any changes made to the form and return to the article list. To save changes and stay on the form, right-click the header bar and choose **Save**.
Mark Public / Mark Internal	Click the **Mark Public** button to make the article accessible to everyone. This action sets **public** as the role for the article. Click the **Mark Internal** button to make the article accessible only to the roles specified by the administrator. If no roles are specified, the article is available to the public and there is no change.
Search for Duplicates	Click this button to search the knowledge base for existing articles that contain similar content.
Delete	Click this button to delete the knowledge article from the system. You must confirm the request before the record is deleted.

Note: *A Permalink URL that can be shared to give others quick access to the article. If you include a permalink URL to another knowledge article, do not include the <span id="permatext"> tag that is part of the permalink CSS, otherwise the normal permalink at the bottom of the article does not render correctly.*

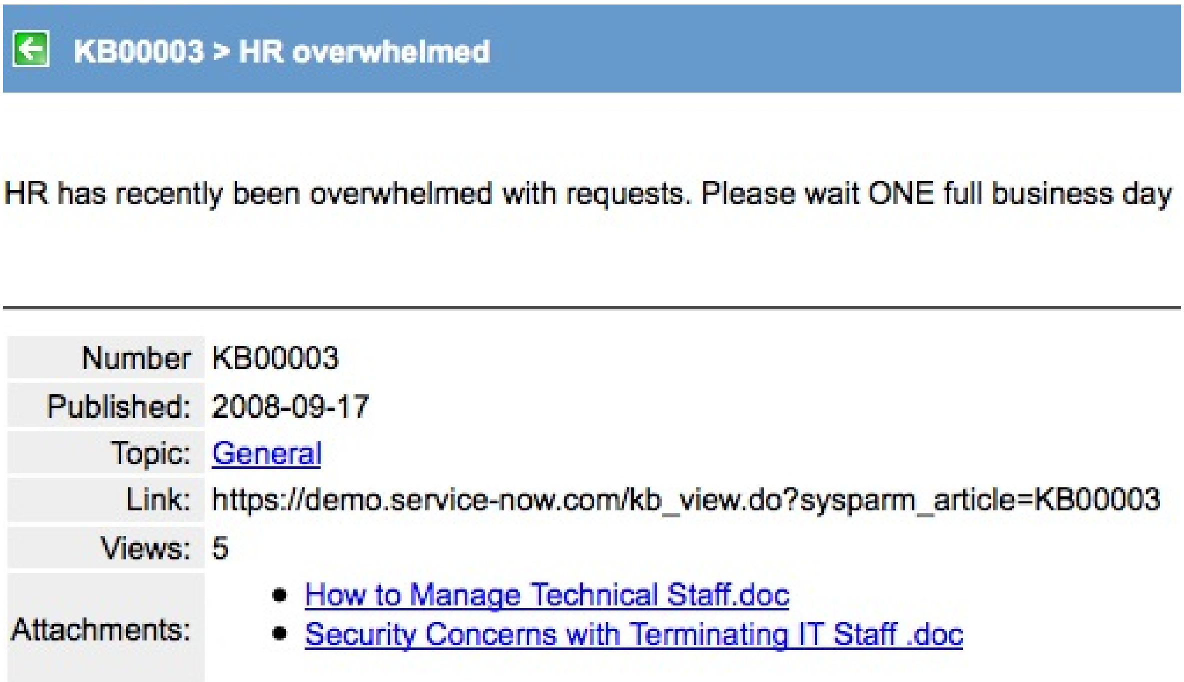
Making Attachments Visible

Like other records, you can add attachments to knowledge articles. By default, they appear only to users with the admin, knowledge_admin, or knowledge role, who can view the knowledge record by navigating to **Knowledge Base > Edit** or clicking the **Edit Article** button when viewing the article.

Select the **Display Attachments** check box on the Knowledge form to display a list of attachments to users viewing the article. You might need to configure the form to display this field.



A list of attachments appears below the article if **Display attachments** is selected.

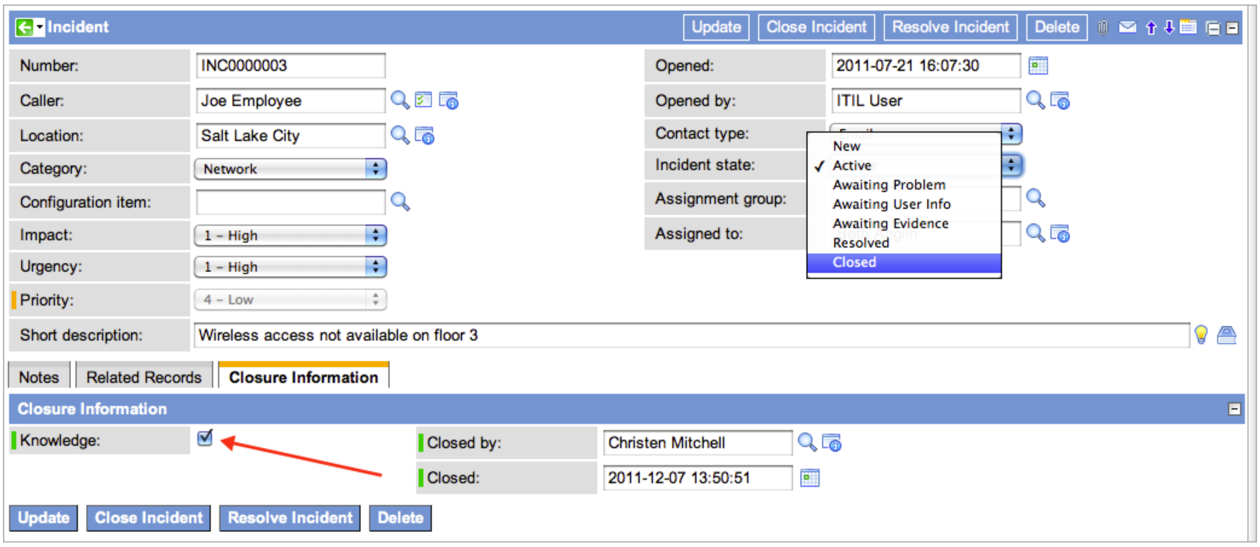


Creating Knowledge from an Incident

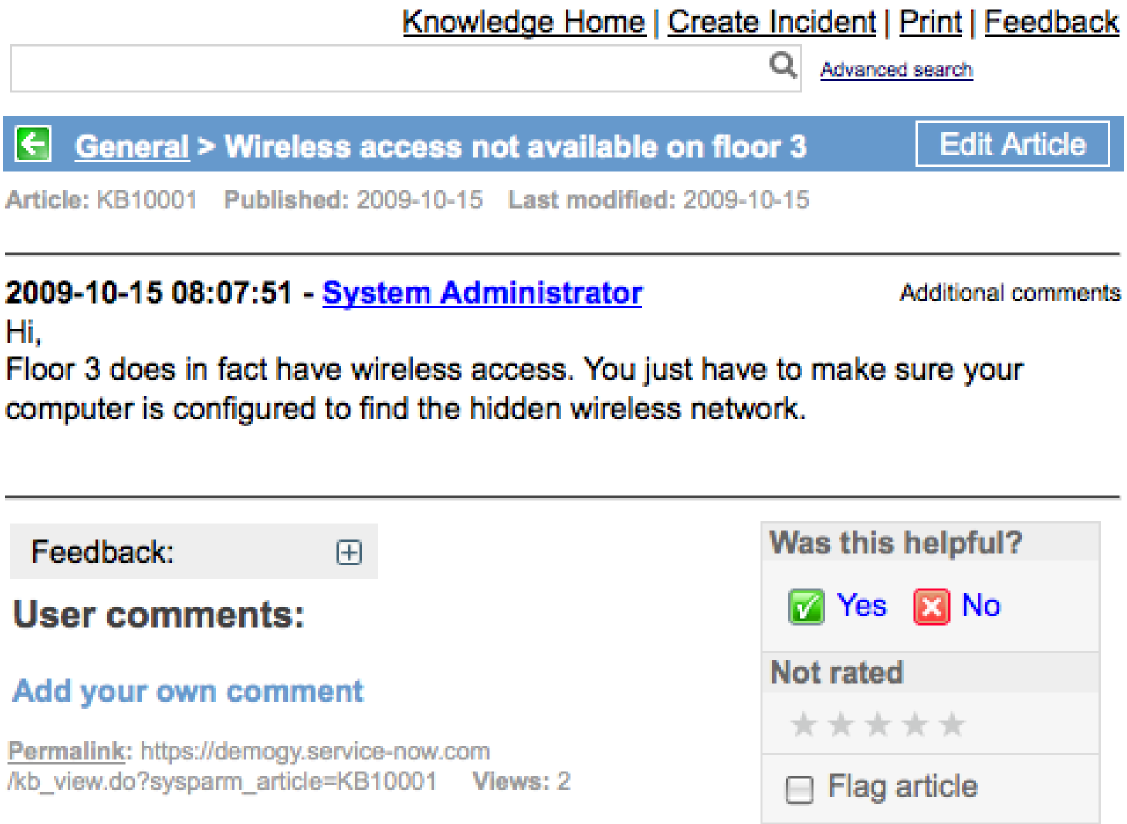
Incidents within ITIL processes often generate information that may be needed in the future. ServiceNow can automatically submit relevant information to the knowledge management process when the incident is closed.

Select the **Knowledge** check box in the Incident form **Closure Information** section to enable this feature. Closing the incident triggers the business rule **Incident Create Knowledge**. By default, the business rule creates a knowledge article in the **Draft** workflow state. The incident **Short description** becomes the article **Short description**. The incident **Additional comments** become the article **Text**. If the knowledge submission workflow is enabled, the incident **Short description** and **Additional comments** become a knowledge submission instead of an article. For more information, see Knowledge Workflow.

For example, this is an incident being closed.



And this is the resulting article as it appears in the knowledge base.



Creating Knowledge from a Problem

The ServiceNow Problem form includes four options for creating knowledge directly from the problem:

- **Knowledge** check box
- **Communicate Workaround** related link
- **Post Knowledge** related link
- **Post News** related link

Using the Knowledge Check Box

Like incidents, problems within ITIL processes often generate information that may be needed in the future. ServiceNow can automatically submit relevant information to the knowledge management process when a problem is closed.

Select the **Knowledge** check box on the Problem form to enable this feature. Closing the problem triggers the business rule **Problem Create Knowledge**. By default, the business rule creates a knowledge article in the **Draft** workflow state, ready for a knowledge team member to review and publish. The problem **Short description** becomes the article **Short description** and the problem **Work notes** become the article **Text**. If the knowledge submission workflow is enabled, the problem **Work notes** become a knowledge submission instead of an article. For more information, see Knowledge Workflow.

Communicating a Workaround

To update all incidents associated with a problem, go to the Problem form and click the **Communicate Workaround** related link. This adds the problem number and the contents of the s **Workaround** field as a new entry in the **Activity** field on all related incidents.

By default, any entries made in an incident **Activity** field generate an email notification to the **Caller** on the Incident form. The **Communicate Workaround** option on the Problem form quickly and easily communicates workarounds to multiple users from one place, eliminating the need to manually update each incident.

If group on-call rotation scheduling is in effect when you communicate a workaround, ServiceNow stops the escalations on the associated incidents because the workaround has been communicated to the end users.

This effectively communicates knowledge to the appropriate audience, but does not create a knowledge article.

Posting Knowledge

To create a new knowledge article from a problem immediately, rather than when the problem closes, go to the Problem form and click the **Post Knowledge** related link. The resulting knowledge article contains the following information:

- The problem number and **Short description** become the knowledge article **Short description**.
- The problem **Description** and **Work notes** become the knowledge article **Text**.
- The problem **Configuration item** becomes the knowledge article **Configuration Item**.
- The article **Topic** is set to **Known Error**.

By default, ServiceNow creates a knowledge article in **Draft** workflow state. If the knowledge submission workflow is enabled, the problem **Short description** and **Work notes** are placed into a knowledge submission instead of an article. For more information, see Knowledge Workflow.

Posting News

To quickly create and publish a knowledge article in the News topic, go to the Problem form and click the **Post News** related link. The resulting knowledge article contains the following information:

- The problem number and **Short description** become the knowledge article **Short description**.
- The problem **Description** and **Work notes** become the knowledge article **Text**.
- The problem **Configuration Item** becomes the knowledge article **Configuration Item** for the **Affected Products** related list.

These articles appear in the **News** topic of the knowledge portal when published.

If the knowledge submission workflow is enabled, the problem **Short description** and **Work notes** are placed into a knowledge submission instead of an article. For more information, see Knowledge Workflow.

Modifying the UI Actions

Administrators can modify the behavior of the the **Communicate Workaround**, **Post Knowledge**, and **Post News** related links. Navigate to **System Definition > UI Actions** and modify the record with the same name as the related link. For more information, see UI Actions.

Accessing External Knowledge Articles

Use **Knowledge Base > Navigation Add-ons** to configure access to another knowledge base, either public or private, or to a public search engine.

The process of importing knowledge base articles depends on how the source data is stored and formatted. If you need to import knowledge content directly from another source to the ServiceNow knowledge base, please contact your Account Executive or Professional Services consultant.

Using Wiki Markup

Overview

Knowledge Management Wiki Support lets you create knowledge base articles in Wiki markup language or HTML. Wiki markup provides easier linking capabilities than HTML and better controls for importing images into knowledge articles.

Supported Wiki Tags

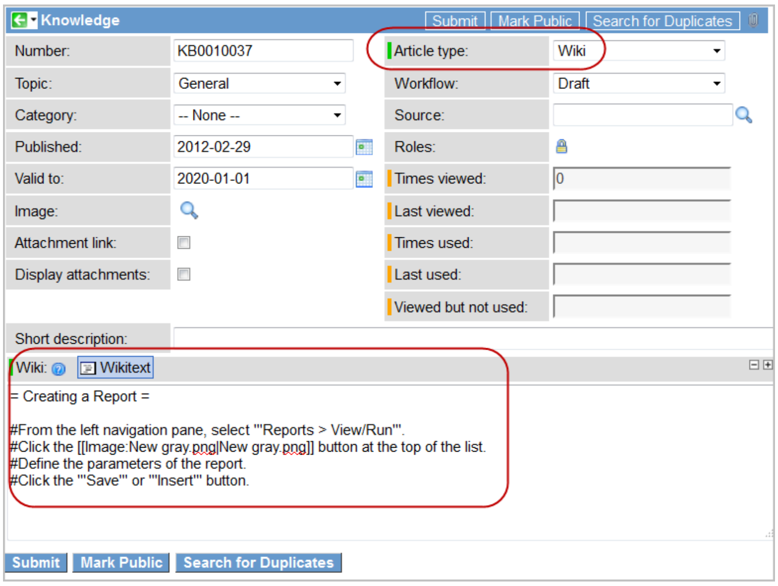
The following basic tags are supported for Wiktext fields in the ServiceNow platform:

Format	Wiki Tag
Headers	= Header 1 =, == Header 2 ==, etc.
Numbered step	#Step 1
Bullets (multi-level)	*Bullet 1, **Bullet 2
Indentation	:Level 1, ::Level 2
Line break	
Tables	Full table support, including cell spacing, padding, borders, background shading, and width measurements. See Creating wiki tables [1]. **NOTE**:*Sortable tables are not supported (class="sortable").*
Code blocks	<pre> Generic block </pre> <javascript> Javascript Syntax </javascript> <xml> XML Syntax </xml>
Bold	'''text'''
Italics	''text''
Ignore Wiki and HTML formatting	<nowiki> wikitext </nowiki>
Web link	[http://community.service-now.com/ <link text>]
Placed images	[[Image:<image name>]] See Storing Images in the Database for details on uploading image files to the database. **Note:** *Wiki image tags such as **thumb**, dynamic resizing, or image captions are not supported.*
HTML	Most common HTML tags are supported bold, strong, <i>italics</i>, header1 , header2 , header3 , paragraph , _{sub}, ^{sup}, <center>center</center>

Using the Wiki Editor

To create a knowledge article in Wiki markup:

1. Navigate to **Knowledge Base > Create New**.
2. In the **Article type** field, select **Wiki**.
3. In the **Wiki** field, click **Wikitext** to open the text field.
4. Enter the article text, using Wiki markup language to format the content.
5. Click **Wikitext** again to view the formatted article.
6. Click **Submit** to save the article.



Knowledge Management Wiki Editor

References

[1] http://en.wikipedia.org/wiki/Help:Wikitable

Using the Knowledge Workflow

Overview

Two workflow options are available for knowledge management: standard and submission. *Standard* workflow is active by default. With this workflow, new articles created from incidents and problems are treated the same as articles created manually by knowledge management team members. All new articles create a knowledge record and can be edited through the Knowledge form. The article moves through Draft, Review, and Published workflow states.

Submission workflow can be activated by an administrator. With this task-based workflow, articles created from incidents and problems become article submissions. Knowledge management team members review the information and determine whether to create a new article, update an existing article, or take no action. The task-based knowledge submission workflow offers these advantages:

- Knowledge submissions can be assigned to knowledge workers outside the knowledge management team.
- Knowledge submissions appear on the knowledge worker's **Service Desk > My Work** queue.
- Knowledge submissions appear on task-based work reports so knowledge workers get credit for working on knowledge.
- Automated feedback to knowledge submitters lets them know their submission is being worked on.

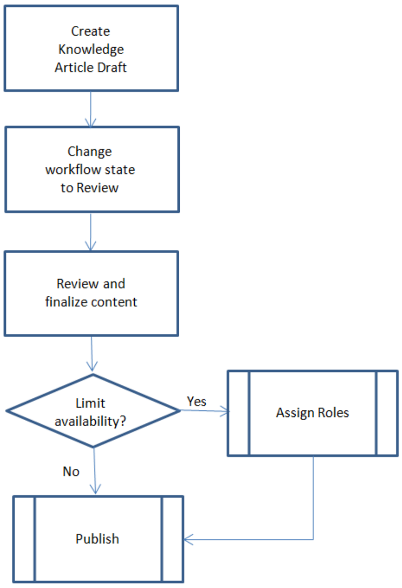
These two workflows provide general guidelines for processing knowledge content. The knowledge submission workflow provides automated notification to users who submit knowledge from an incident or problem. Use the ServiceNow Workflow application to automate even more of the knowledge management process.

Using the Standard Knowledge Workflow

The standard knowledge workflow is used for all articles created directly on the Knowledge form. It is also used for articles created from incidents or problems if the task-based knowledge submission workflow is not active.

Typically, the standard knowledge workflow operates as follows:

1. Knowledge worker or technician creates a new article, either directly on the Knowledge form or from an incident or problem.
2. ServiceNow sets the Knowledge form's **Workflow** field to **Draft** for the new article.
3. Administrator adds roles to the article, if appropriate, and changes the workflow state to **Review**.
4. Knowledge worker verifies that the article is not a duplicate and edits the content, as necessary.
5. Administrator changes the **Workflow** field to **Published**.
6. Article is available to appropriate users through the knowledge portal and search.



Enabling Knowledge Submission Workflow

Administrators can enable the task-based knowledge submission workflow.

1. Navigate to **Knowledge Base > Properties**.
2. In the **Use submission workflow** field, select the **Yes** check box.
3. Click **Save**.

Using the Knowledge Submission Workflow

The knowledge submission workflow changes the way ServiceNow responds when a technician creates knowledge from an incident or problem. It also changes the process the knowledge management team uses to publish knowledge from these sources.

When the knowledge submission workflow is active:

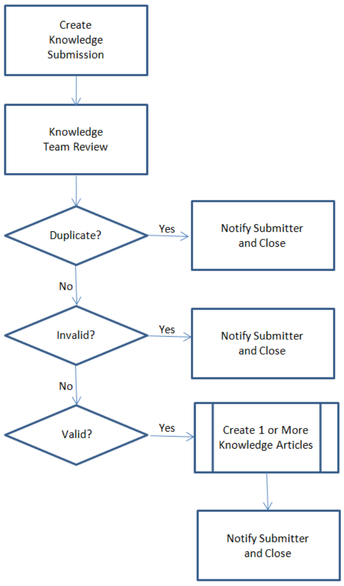
1. Technician selects the **Knowledge** check box for an incident or problem.
2. Technician closes the incident or problem or it is closed automatically by ServiceNow (**Incident state** is **Closed**).
3. ServiceNow creates a knowledge submission record, not a knowledge article.
4. Knowledge worker assigns the knowledge submission task to a group and a person with the itil role.

   By default, only users with the admin, knowledge_admin, and knowledge roles can access submission records. Administrators can grant access to users outside the knowledge management team by assigning them a knowledge role or by giving another role access to the Knowledge Base application.
5. Knowledge worker accesses the assigned submissions through **Knowledge Base > Assigned to me** or **Service Desk > My Work**.
6. Knowledge worker reviews the submission to determine whether it represents a needed article, duplicates an existing article, or is invalid (no article needed).
7. Knowledge worker creates a new article, updates an existing article, or closes the record.
8. ServiceNow notifies the technician that the submission is in progress or has been closed.

   Technician name must appear in the **Submitted by** field for notifications to occur.
9. Knowledge management team moves new articles through the standard stages: Draft, Review, Published.

Note: *This process affects only those articles submitted from the Incident and Problem forms. New articles created directly in the Knowledge form always use the standard workflow.*

This diagram illustrates the knowledge submission workflow.



Creating an Article from a Submission

Users with the admin and knowledge_admin roles can review a knowledge submission to determine whether a knowledge article should be created.

1. Administrator assigns the submission to a knowledge worker with the itil role and either the admin or knowledge_admin role (**Knowledge Base > Open Submissions**, **Assignment group** and **Assigned to** fields).
2. Submission record appears under **Knowledge Base > Assigned to me** for the assigned knowledge worker.
3. Assigned knowledge worker reviews the content of the submission record.
   - If no article is needed, the knowledge worker adds comments in the **Additional comments** or **Work notes** field to explain why. It might be necessary to configure the Kb Submission form to add these fields.
   - If immediate publication is needed, the knowledge worker edits the content in the **Text** field to finalize the article, and then clicks **Create Article**.
   - If the article should go through a review process or be available to specific roles only, the knowledge worker uses the content to create a new knowledge article (**Knowledge Base > Create New**).

These fields are available on the KB Submission form.

Field	Input
Number	Do not change. The number of the submission record is automatically assigned by ServiceNow.
Assignment group	Select a group to work on this submission.
Assigned to	Select an individual to work on this submission. If an **Assignment group** was selected, only users from that group can be assigned. To work on knowledge submissions, a user must have both the itil role and either the admin or the knowledge_admin role.
Status	Select the article's workflow state: • **Submitted:** the submission has not yet been reviewed. • **Assigned:** the submission has been assigned for review. • **Closed, Article(s) Created:** the submission task is closed, all necessary articles have been created. • **Closed, Duplicate:** the submission task is closed, the information duplicates existing articles. • **Closed, Invalid:** the submission task is closed, no article needed (content is erroneous or should not be published).
Attachment link	Select this check box to have this article's link point to a file attachment. To upload the attachment, click the paperclip icon in the upper right corner. The link in the knowledge portal or search results displays the attachment instead of the article text. You can link to one attachment per article. *This field is available to users with the admin or knowledge_admin role only.*
Display attachments	Select this check box to display a list of attachments as links below the article. Although you can have only one **Attachment link**, you can attach multiple files and list them all as links in article view. *This field is available to users with the admin or knowledge_admin role only.*
Parent	Displays the task (incident, problem, or change) number from which the submission was created.
Submitted by	Displays the user who closed the **Parent** task.
Topic	Select the topic in which the article should appear in the knowledge portal.
Category	Select a category to further organize articles in the knowledge portal. Available categories depend on the selected topic.
Valid to	Enter the date when this article expires. Only **Published** articles within the valid date range are visible in the knowledge portal and search. Articles that are not published or whose **Valid to** date has passed are not visible. *This field is available to users with the admin or knowledge_admin role only.*
Text	Enter or edit the text of the article. This area accepts HTML. You can work in WYSIWYG mode, using the toolbar above the text field to apply formatting and create links. Click the HTML icon on the toolbar to open HTML mode, where you can view and format the text with HTML commands. For more information, see Using HTML Fields.
Update	Click this button to save any changes made to the form.
Create Article	Click this button to immediately publish the current content as a public article. **Do not** use this button if the information should be limited to users in specific roles.
Delete	Click this button to delete the knowledge submission from the system. You must confirm the request before the record is deleted.
Generated Articles	Click **New** in this related list to create a new article that is associated with this submission. Additionally, this related list identifies all articles that contain this submission record number in the **Source** field.

Retiring Articles

Each knowledge article has a *valid to* date. After that date passes, the article is no longer accessible through the knowledge portal or knowledge searches. .

Knowledge management team members (admin, knowledge_admin, or knowledge roles) can access retired articles through **Knowledge Base > Retired** or **Knowledge Base > Edit**. Review retired articles to determine whether they should be updated and republished, deleted, or retained for historical reference.

Articles that have passed the *valid to* date still show **Published** as their workflow state. Administrators can change the workflow state:

- Manually by opening the record for each article whose *valid to* date has passed and changing the **Workflow** field to **Retired**.
- Automatically by duplicating the **Incident Autoclose** business rule and modifying the script appropriately.

Setting Up Knowledge Management

Setting Up Knowledge Management

Note: *This article applies to Fuji and earlier releases. For more current information, see Knowledge Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**'

Overview

By default, ServiceNow knowledge management lets you create new articles manually or from existing incidents or problems. Administrators can extend and enhance the knowledge management functionality by setting up:

- Knowledge properties and search capabilities
- Accessibility (private vs. public)
- Portal and article page layout

Knowledge Properties and Search

Access knowledge properties from either of these locations

- **Knowledge Base > Properties**
- **System Properties > Knowledge Management**

These pages, which both display the same options, divide the available properties into groups that let you configure the:

- Knowledge portal
- Article view
- Knowledge search
- Other related elements

In addition to the property settings, administrators can configure a variety of other knowledge search features. For example, you can enable searching from additional forms and fields, add meta tags to enhance searching, and enable search suggestions. For more information, see Administering Knowledge Search.

Knowledge Accessibility

The ServiceNow knowledge base can be *public* or *private*. The knowledge base is *private* by default.

A *public* knowledge base is accessible to everyone, no login required. When a user enters the URL **<instance name>.service-now.com/kb_home.do**, the knowledge portal appears. This approach provides easy access to published knowledge articles. Administrators can protect sensitive content by applying role-based access to those articles.

A *private* knowledge base requires users to log in before they can access any articles. When a user enters the URL **<instance name>.service-now.com/kb_home.do**, the login page appears. After logging in, users see the knowledge portal. This approach provides secure access to all knowledge articles. Administrators can further protect sensitive content by applying role-based access to those articles.

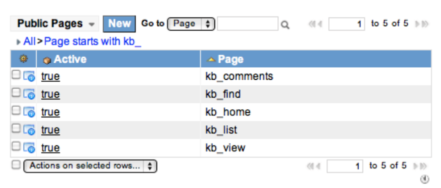
Administrators can make a public knowledge base private or make a private knowledge base public, depending on organizational needs.

1. If it is not active, activate the **System Definition > Public Pages** module by editing the System Definition application.
2. Navigate to **System Definition > Public Pages**.
3. Filter the list to view pages that start with **kb_**.
4. Open each page whose accessibility is to be changed and select the **Active** check box to make the page public. Clear the **Active** check box to make the page private.

    For a public knowledge base, both the kb_home and kb_list pages must be active. Login is required to view articles for any pages that are not active.

These public pages affect the accessibility of the knowledge portal.

Page Name	Description
kb_comments	Enables public users to see comments from other users, if active.
kb_find	Enables public users to search the knowledge base, if active.
kb_home	Displays the knowledge portal page, if both this page and kb_list are active.
kb_list	Displays the list of articles on the knowledge portal page, if both this page and kb_home are active.
kb_view	Enables public users to view knowledge articles, if active.



Public knowledge base pages

Knowledge Portal

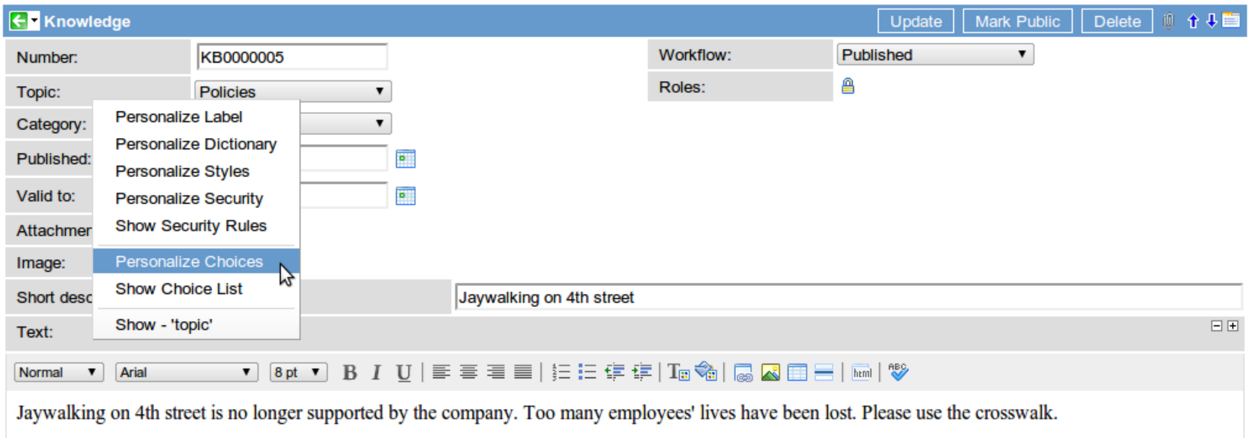
The knowledge portal page displays a list of recent articles organized by topic. Administrators control what topics are available and the layout of topics on the portal page, as well as whether unpublished articles are visible.

Adding or Removing Knowledge Topics

When removing a topic, be sure to update the associated articles to use a new topic. Otherwise, those articles do not appear on the knowledge portal, though they can be found with knowledge search.

To add or remove topics from the knowledge base:

1. Navigate to **Knowledge Base > Edit**.
2. Open any knowledge record.
3. Right-click the **Topic** field label, and select **Personalize Choices**.



4. Use the form to create new topic names, add or remove topics, and change their order in the list (**Move up** and **Move down** arrows).

   The order of topics in this list affects the layout on the knowledge portal. See Arranging Topics.
5. Click **Save**.
6. If needed, update the **Topic** setting for the knowledge record and click **Update**.

Arranging Topics

Use the Knowledge Management Properties page to configure whether empty topics appear on the knowledge portal.

By default, topics display from left to right on the knowledge portal in the same sequence that they appear on the Knowledge form's **Topic** choice list.

Any user can temporarily change the order of topics on their view of the knowledge portal:

1. Click and hold on the topic header bar.
2. Drag the topic box to the desired location.

Administrators can permanently change the portal's standard topic arrangement by reordering the choices in the Topic field. See Adding or Removing Knowledge Topics.

Showing Unpublished Articles

You can configure the knowledge portal and search results to provide role-based access to articles in the draft or review state.

1. Navigate to **Knowledge Base > Properties**.
2. Use **Show unpublished articles in Knowledge Base portal and topic lists** to indicate whether unpublished articles are ever shown in the knowledge portal and search results.
3. Use **List of roles (comma separated) that can see articles in the Review workflow state in the Knowledge portal and Topic list** to designate which roles can see articles in the review state.

   If the list of roles is blank or the public role is included, all users can see articles in the review state.

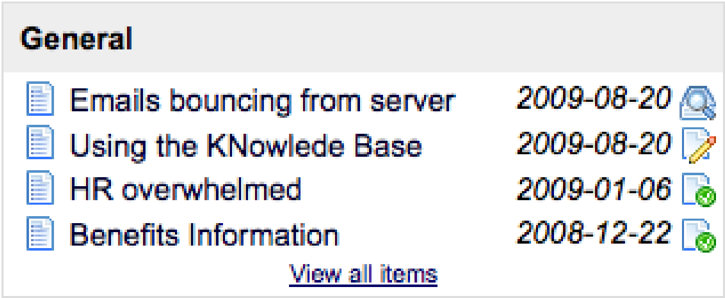
4. Use **List of roles (comma separated) that can see articles in the Draft workflow state in the Knowledge portal and Topic list** to designate which roles can see articles in the draft state.

   If the list of roles is blank or the public role is included, all users can see articles in the draft state.
5. Click **Save**.

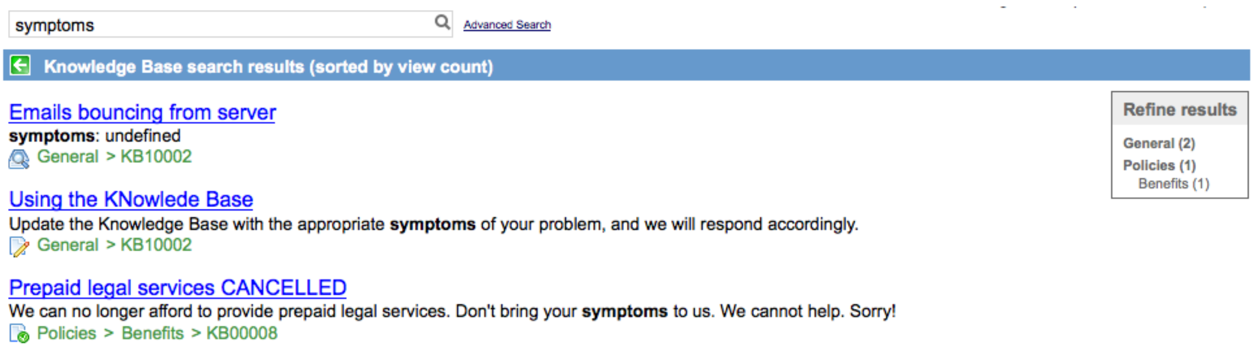
Icons denote the state of the articles:

- Draft: 
- Review: 
- Published: 

In the knowledge portal, state icons appear beside the article's date.



In search results, state icons appear beside the article path.



Article View

Administrators can control the presence and appearance of various elements on knowledge article pages.

- The **Show "Link" URL in Knowledge articles** property lets you control whether the permalink (direct link to the article) appears below an article.
- The **kb_article_footer** UI macro lets you control the look of the permalink and view count.
- The **kb_view** UI page lets you control the look and feel of page layout features, article metadata (article number, date published, and date last modified), and feedback options. This UI page also lets you control where and how related information appears on the page: affected products, attachments, and tasks to which the article is attached.

Adding Custom Content to Article View

If your organization requires specific information to appear with all articles, such as a custom field on the knowledge records, create a UI macro named **kb_view_custom**. Creating this UI macro requires a knowledge of scripting.

When ServiceNow displays a knowledge article, it searches for the **kb_view_custom** UI macro. If the UI macro is found, its contents are displayed immediately below the article text.

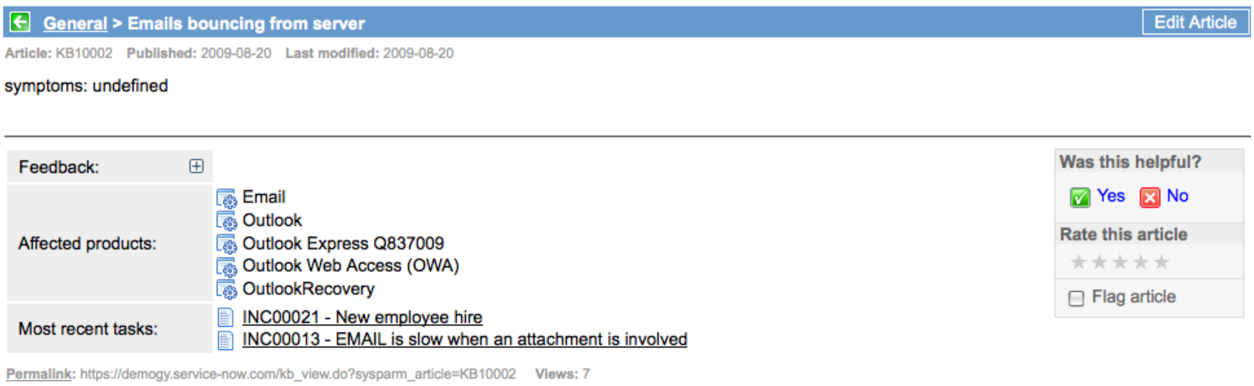
- Since this custom UI macro is inserted into an existing HTML table, any text to be displayed must be contained in a <tr> tag with one or more <td> tags.
- The variable `kb`, a GlideRecord that is the current article's kb_knowledge record, is available to this custom UI macro.

For example, the following UI macro script would display the contents of a custom kb_knowledge field immediately below the article text, but only to users with the itil role:

```
<?xml version="1.0" encoding="utf-8" ?>
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null" xmlns:g2="null">


  <j:if test="${gs.hasRole('itil')}">  // checks for the itil role

        My new field: $[kb.u_my_field.getDisplayValue()]  // displays the content of the u_my_field from the current article

  </j:if>


</j:jelly>
```

Displaying Affected Products and Most Recent Tasks

Knowledge articles can display a list of products or tasks (such as incidents, problems, or changes) associated with the content. When they are used, the **Affected products** list and the **Most recent tasks** list appear below any article for which relevant information is available.



To display a list of associated products:

1. Navigate to **Knowledge Base > Properties**.
2. Select the **Show affected products when viewing an article** property.
3. Click **Save**.
4. Navigate to **Knowledge Base > Edit** and open a record.
5. Add the appropriate configuration items to the **Affected Products** related list.

   If needed, add the related list.
6. Click **Save**.

To display a list of associated tasks:

1. Navigate to **Knowledge Base > Properties**.

2. Under **Show tasks to which an article has been recently attached**, select the **Yes** check box.
3. Use the property **Number of attached tasks to display when viewing an article** to set a maximum number of attached tasks to list in article view.
4. Click **Save**.

   Article view lists the task from which the article was created, if any (see Creating Knowledge), and any tasks to which the article has been attached.

Configuring Feedback Options

Article view displays one or more feedback options below the article. These options permit users to give specific kinds of feedback. Administrators can enable or disable feedback options or apply role-based restrictions.

Was This Helpful?

The question *Was This Helpful?* requests a simple **Yes** or **No** answer. If the user responds to this question, a **Feedback** field opens for comments and a **Create Incident** link may appear. Control these options in **Knowledge Base > Properties**.

- **Show the "Was this article helpful?" yes/no rating option:** controls whether this option appears in article view.
- **List of roles (comma separated) that can see yes/no "Was this article helpful?" rating option:** sets the roles permitted to see this feedback option.
- **Show "Create Incident" link after a Knowledge article is rated not helpful:** indicates whether users can create an incident from an article rated as not helpful.
- **URL used for the "Create Incident" link after rating a Knowledge article not helpful:** specifies the URL for creating an incident. The default setting is:

```
incident.do?sys_id=-1&sysparm_query=active=true^comments=(Created after Knowledge search: [HTML:sysparm_search])&sysparm_stack=kb_home.do
```

Five-Star Rating System

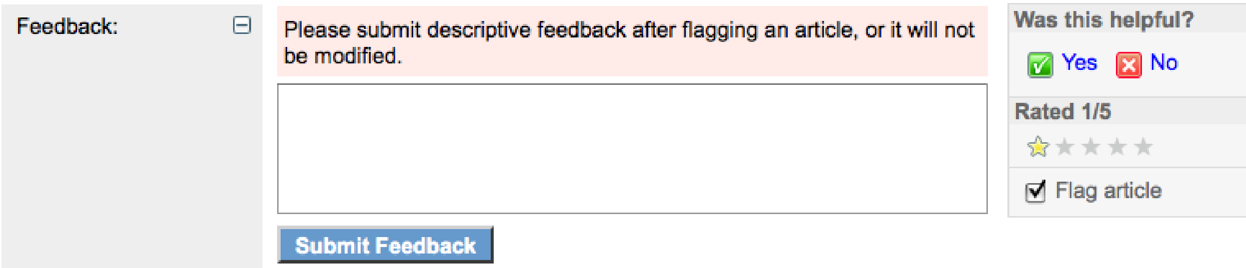
The five-star rating system lets users indicate the article's effectiveness on a scale of 1 to 5. As the cursor moves over the stars, the heading previews the rating until the user clicks. Control these options in **Knowledge Base > Properties**.

- **Show five-star rating option:** controls whether this option appears in article view.
- **List of roles (comma separated) that can see five-star rating option:** sets the roles permitted to see this feedback option.

Flag Article

When a user selects the **Flag article** check box, the **Feedback** field becomes mandatory. Control these options in **Knowledge Base > Properties**.

- **Show "Flag Article" option to identify incomplete/inaccurate articles:** controls whether this option appears in article view.
- **List of roles (comma separated) that can flag incomplete/inaccurate articles:** sets the roles permitted to see this feedback option.



Administering Knowledge Search

Note: *This article applies to Fuji and earlier releases. For more current information, see Knowledge Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.'**

Overview

By default, ServiceNow indexes all knowledge base attachments and includes their content in knowledge searches. ServiceNow uses Porter stemming [1] for text searches, meaning that search terms may return similar words. See How search works for more details.

Administrators can manage knowledge search capability in the following ways:

- Turn indexing on or off.
- Configure the behavior and appearance of other knowledge search features.
- Add hidden meta tags, related terms that are not in the knowledge article itself, for enhanced searching.
- Change the default sort order for search results.
- Enable or disable the **Advanced search** and the **Refine results** options.
- Use the Search Log to monitor the number of views for a search key word.

Setting Knowledge Search Properties

Several options are included in the Knowledge Management Properties page for controlling various aspects of the knowledge search.

1. Navigate to **Knowledge Base > Properties**
2. Scroll to the **Knowledge Search Properties** section of the page.
3. Set the properties as appropriate for your environment. For detailed explanations of the available search options, see Configuring Knowledge Properties. In summary, you can set these properties:
   - **Advanced Search:** control display of the **Advanced search** link, which lets users filter their search by topic, category, and language (if active).
   - **Number of Results Displayed:** set the maximum number of search results to display. The default is 30. Controlling the number of search results improves search performance.
   - **Default Sort Order:** set the order in which search results are listed.
   - **Refine Results:** control display of the **Refine results** box, which lets users drill into the search results by topic and category.
   - **Knowledge Search Method:** specify whether knowledge search locates articles containing ALL search terms or ANY individual search term.
4. Click **Save**.

Search rankings

By default the search results are sorted by number of views (see Sorting Search Results for more information). Search results rankings are based on scoring "weights" (by default, base system knowledge articles have the highest weight). Administrators can set the relative weight for each field in a table being searched.

Adding the Knowledge Search Icon to a Field

Administrators can add the knowledge search icon to any small or medium (255 characters or less) string field. When a user clicks this icon, ServiceNow searches the knowledge base for the text in the associated field.

1. Navigate to the appropriate form.
2. Right-click the field label and select **Personalize Dictionary**.
3. In the **Attributes** field, add **knowledge_search**.

   Separate multiple attributes with commas.
4. Click **Update**.

Customizing Knowledge Search from Fields

You can customize the knowledge search icon to search an external knowledge base:

1. Navigate to the appropriate form.
2. Right-click the field to be customized and select **Personalize Dictionary**.
3. In the **Attributes** field, enter `knowledge_custom=customKnowledgeSearch`.
4. In the **Attributes** field, add `knowledge_search=false`.

   Attributes must be separated by commas.
5. Click **Update**.
6. Create an onLoad() client script (**System Definition > Client Scripts**) for the table associated with the customized form. Be sure the script contains the following:

```
function onLoad() {
  -- do any onLoad actions here (optional) --
}

function customKnowledgeSearch(searchText, elementName) {
  -- do any custom actions here to search your own knowledge base --
}
```

Now, when a user clicks the knowledge search icon ( ), the `customKnowledgeSearch()` function is called with the search text from any of the fields on the form. This is similar to any client script that uses `g_form.getValue('name')`.

Example: Custom Search from Multiple Fields

In some cases, it might be useful to include text from multiple fields as input to the search query. You can accomplish this by modifying the dictionary for the search field (most often short_description) and adding the `knowledge_custom=customKnowledgeSearch` attribute, along with the following client script.

This client script takes the short_description and the cmdb_ci fields as input, but it can be modified as necessary:

```
function onLoad() {
  return;
}

function customKnowledgeSearch(searchText, elementName) {
  var ci = g_form.getReference('cmdb_ci').name;
  if(ci)
    var url = 'kb_find.do?sysparm_search=' + escape(searchText) + " " +
 ci;
  else
    var url = 'kb_find.do?sysparm_search=' + escape(searchText);
  url += "&sysparm_nameofstack=kbpop";
  url += "&sysparm_kb_search_table=incident"; //This example runs on
the Incident table. Edit the table name as necessary
  url += "&sysparm_operator=IR_AND_OR_QUERY"; //Tries an 'AND' exact
match query and uses an 'OR' query if no exact match
  //url += "&sysparm_operator=IR_OR_QUERY"; //Searches using an 'OR'
query
  //url += "&sysparm_operator=IR_AND_QUERY"; //Searches using an 'AND'
query
  popupOpenStandard(url, "kb2task");
}
```

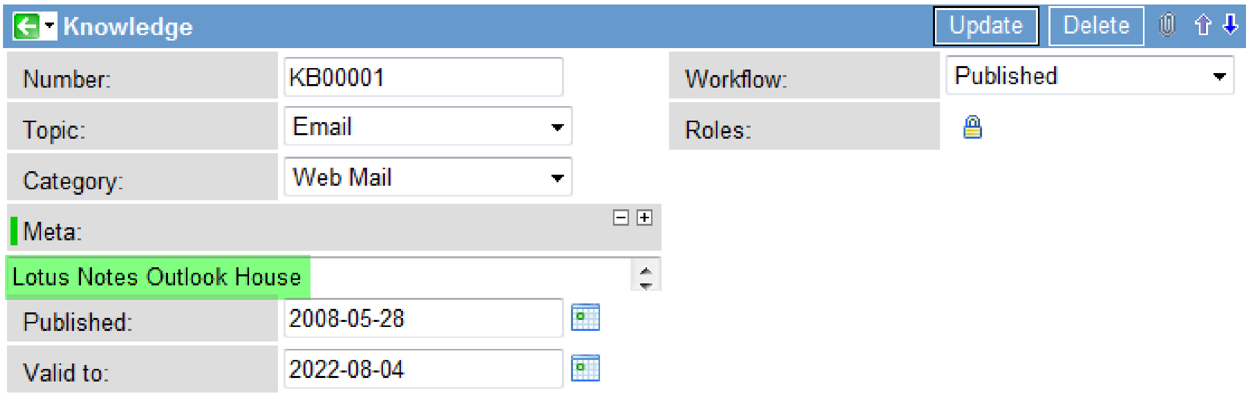
Note: *The `IR_QUERY` lines in this example can be used to customize the type of search that is performed with the search terms provided.*

Searching Knowledge Base Meta Tags

You can add searchable meta tags to knowledge articles with the **Meta** field. Meta tags are hidden from the end user and are not part of the text of the article itself, but they return a positive "hit" in a search. For example, if you added the word *computer* as a meta tag in a particular article, then a search for *computer* would find the article even if the word never actually appears in the article's text.

1. Navigate to the Knowledge form for any article.
2. Configure the form to add the **Meta** field, if needed.
3. Enter additional search terms into the **Meta** field.

   Search terms do not have to be separated with commas or follow any formatting rules.
4. Click **Update**.



Customizing the Attach to Task Button

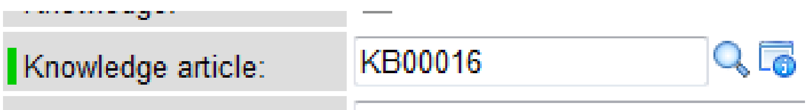
When a user clicks the knowledge search icon in a form, such as the Incident or Problem form, a pop-up window displays the search results. If the user views an article in that pop-up window, the article view includes an **Attach to Task** button that is tailored to the table associated with the search. For example, it reads **Attach to Change** if the search was launched from the Change form, or **Attach to Catalog Task** if the search was launched from the Catalog Task form.

By default, when the user clicks the **Attach to Task** button, the article number and text are added to the task record's **Additional comments** field, if it exists. Otherwise, the article number and text are added to the **Description** field.

Administrators can control the **Attach to Task** behavior.

1. Navigate to **Knowledge Base > Properties**.
2. In **When attaching an article to an incident, copy the content into this field**, enter a different field name. For example, you might enter **work_notes** or **description**.
   - Be sure to use the **Element** name for the field. Find this by right-clicking the field name and selecting **Personalize Label.**
   - If the specified field does not exist on the form, or if the field's element name is not entered correctly, the system uses the **Comments** or **Description** field, instead.
   - You can specify more than one target field, separated by commas. In this case, the system looks for each field in order and copies the contents into the first one it finds on the form. It *does not* copy the data into multiple fields.
3. Click **Update**.

The copy behavior is based on the data type of the destination field. If the destination field is a *reference* field to kb_knowledge, a reference link is created to the existing article rather than the contents being copied in.



Changing the "Attach to Incident" Button Label

The **Attach to Incident** button attaches the article to the active task (incident, problem, or other). You may want to change the text of this button to **Attach to Task** or something similarly general.

To modify this button text:

1. Navigate to **System UI -> Messages**.
2. Open the message record **kb.article.attach_incident** and modify the message (default **Attach to Incident**).
3. Click **Update**.

Search Suggestions

"Did you mean?" search suggestions are disabled by default, but can be enabled by an administrator. For information about using search suggestions, see Search Suggestions. For information about configuring search suggestions, see Administering Zing Text Search.

Controlling the "Mark as Solution" Button

The **Mark as Solution** button is legacy functionality that is part of the Many-to-Many Task Relations plugin. When a user clicks the button, ServiceNow creates a record in the Task / KB Relationships (task_rel_kb) table to associate the knowledge article with a task. With the KCS functionality, this functionality is no longer necessary.

If you previously activated the Many-to-Many Task Relations plugin, you can disable the **Mark as Solution** button:

1. Navigate to **System UI > UI Macros**.
2. Open the **solution_button** record.
3. Clear the **Active** check box
4. Click **Update**.

Configuring Knowledge Properties

Note: *This article applies to Fuji. For more current information, see Knowledge Properties* [1] *at* http://docs.servicenow.com The ServiceNow Wiki is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

As an administrator, you can configure the look and functionality of many knowledge base features with knowledge properties. You can access the following knowledge properties by navigating to **Knowledge > Properties**.

Knowledge Portal Properties

Knowledge portal properties control the look and functionality of the legacy portal page. This portal page lists recent knowledge articles and their publishing dates, organized by topic.

Property	Description
Number of columns on Knowledge portal pages. (`glide.knowman.columns`)	Set the number of columns for arranging topics on the knowledge portal.
Maximum number of articles per content block on the home page. (`glide.knowman.content_block_limit`)	Enter the maximum number of articles to display in the **Most Useful** and **Most Viewed** sections of the knowledge homepage.
Omit empty Knowledge topics and categories. (`glide.knowman.show_only_populated`)	Select the **Yes** check box to display topic sections only if there are articles for the topic. Clear the check box to show all topic sections, even those with no assigned articles. **Note:** *This property applies only to the default knowledge base and the legacy knowledge portal. Knowledge v3 articles do not specify a topic.*
Show Knowledge section descriptions. (`glide.knowman.show_descriptions`)	Select the **Yes** check box to display topic descriptions on the knowledge portal. To enter these descriptions: 1. Edit an existing knowledge article. 2. Right-click the **Topic** field label and choose **Show Choice List**. 3. Open the record for the topic name and enter the description into the **Hint** field. Clear the check box to omit section descriptions from the knowledge portal.
Number of Knowledge Base items to preview in a section. (`glide.knowman.section_limit`)	Set the maximum number of articles per topic for the knowledge portal. The specific articles shown depends on the **Knowledge section sort field** property setting.
Knowledge section sort field. (`glide.knowman.section_sort`)	Select the default order for articles within each topic section on the knowledge portal. • **Published:** uses the date published. • **View count:** uses the number of times articles have been viewed during the period specified in the **Number of days used when summing article views** property. • **Alphabetically:** uses the first letter of the article title (**Short description** field).

Knowledge Base section sort direction. (`glide.knowman.section_sort_direction`)	Select the order, **ascending** or **descending**, in which articles are listed within each topic section on the knowledge portal. The value used for sorting is set in the **Knowledge section sort field** property.
Show unpublished articles in Knowledge Base portal and topic lists. (`glide.knowman.show_unpublished`)	Select the **Yes** check box to allow users to see unpublished articles on the knowledge portal and knowledge search results. Use the subsequent **List of roles...** properties to designated which users can see articles in various unpublished states. If this is not selected, users with appropriate roles can access unpublished articles through other modules of the **Knowledge Base** application.
List of roles (comma separated) that can see articles in the Review workflow state on the knowledge portal and topic list. (`glide.knowman.section.view_roles.review`)	Enter role names exactly as they appear in **User Administration > Roles**. If **Show unpublished articles in Knowledge Base portal and topic lists** is selected, users with these roles see articles in the Review workflow state on the knowledge portal, in the topic list that appears when they click a topic title on the portal, and in knowledge search results.
List of roles (comma separated) that can see articles in the Draft workflow state on the knowledge portal and topic list. (`glide.knowman.section.view_roles.draft`)	Enter role names exactly as they appear in **User Administration > Roles**. If **Show unpublished articles in Knowledge Base portal and topic lists** is selected, users with these roles see articles in the Draft workflow state on the knowledge portal, in the topic list that appears when they click a topic title on the portal, and in knowledge search results.
The number of articles that are asynchronously loaded when scrolling down in the new search results page. (`glide.knowman.search.articles_per_page`)	Enter the number of articles to be displayed during a search.
Show only Knowledge topic titles on portal page (no article links). (`glide.knowman.home_titlesonly`)	Select the **Yes** check box to omit all article titles from the knowledge portal and show only the topic names. Users can click the topic title to see the list of related articles.
Number of days (integer, default 30) used when counting article views. Views older than this are not considered. 0 means consider all views. (`glide.knowman.view_age.days`)	Enter a number of days to consider when calculating view count. Enter 0 to have ServiceNow consider all views, regardless of date.
Automatically place cursor in Knowledge portal search box. (`glide.knowman.portal_search_focus`)	Select the **Yes** check box to have ServiceNow place the cursor in the search field when a user opens the knowledge portal. Clear the check box to have users click in the search field before entering a search term.

Article View Properties

Article view properties give you control over the meta data and rating options that appear with articles. They also enable you to grant access to individual feedback options based on user role.

Property	Description
Show tasks to which an article has been recently attached. (`glide.knowman.recent_tasks.display`)	Select the **Yes** check box to have article view include a list of tasks associated with the article. Knowledge articles can be attached to a task by clicking the *attach to task* button after searching from a form.
Number of attached tasks to display when viewing an article. (`glide.knowman.recent_tasks`)	Specify the maximum number of tasks to list in article view.
Show article rating section, which may optionally include yes/no rating, star rating, and flagging options. (`glide.knowman.show_rating_options`)	Select the **Yes** check box to display the rating options for users with specific roles. Clear this check box to omit the rating section for all users, regardless of role. The **Feedback** field is always displayed for all users.

List of roles (comma separated) that can see an article's rating section, which may optionally include yes/no rating, star rating, and flagging option. (`glide.knowman.show_rating_options.roles`)	Enter role names exactly as they appear in **User Administration > Roles**. If **Show article rating section...** is selected, users with the roles listed here see the yes/no rating, star rating, and flagging options, according to related property settings. Be sure to include all roles that should be permitted to see any of these rating options. Separate properties enable you to identify specific roles for each option separately. All roles in those properties must also be listed here.
Show the "Was this article helpful?" yes/no rating option. (`glide.knowman.show_yn_rating`)	Select the **Yes** check box to display the "Was this article helpful?" rating to users with roles set in the associated property. This appears only if the **Show article rating section...** property is selected.
List of roles (comma separated) that can see yes/no "Was this article helpful?" rating option. (`glide.knowman.show_yn_rating.roles`)	Enter role names exactly as they appear in **User Administration > Roles**. If both **Show article rating section...** and **Show the "Was this article helpful?"** properties are selected, users with the roles listed here see the "Was this article helpful?" rating in article view. All roles listed here must also be listed in the **List of roles that can see an article's rating section...** property.
Show "Create Incident" link after a Knowledge article is rated not helpful. (`glide.knowman.create_incident_link.display`)	Select the **Yes** check box to display the **Create Incident** link after a user rates an article as not helpful.
URL used for the "Create Incident" link after rating a Knowledge article not helpful. (`glide.knowman.create_incident_link`)	Enter the URL for the form where users can create an incident only if the **Show "Create Incident" link..."' property is selected.** To find the URL, open the appropriate form, then right-click the form header and choose **Copy URL**. Highlight the URL that appears and use the browser's copy and paste feature to place it into this property field.
Show five-star rating option. (`glide.knowman.show_star_rating`)	Select the **Yes** check box to display the five-star rating to users with roles set in the associated property. This appears only if the **Show article rating section...** property is selected.
List of roles (comma separated) that can see five-star rating option. (`glide.knowman.show_star_rating.roles`)	Enter role names exactly as they appear in **User Administration > Roles**. If both **Show article rating section...** and **Show five-star rating option** properties are selected, users with the roles listed here see the five-star rating option in article view. All roles listed here must also be listed in the **List of roles that can see an article's rating section...** property.
Show "Flag Article" option to identify incomplete/inaccurate articles. (`glide.knowman.show_flag`)	Select the **Yes** check box to display the flag article option to users with roles set in the associated property. This appears only if the **Show article rating section...** property is selected.
List of roles (comma separated) that can flag incomplete/inaccurate articles. (`glide.knowman.show_flag.roles`)	Enter role names exactly as they appear in **User Administration > Roles**. If both **Show article rating section...** and **Show "Flag Article" option** properties are selected, users with the roles listed here see the flag article option in article view. All roles listed here must also be listed in the **List of roles that can see an article's rating section...** property.
Show user comments on knowledge articles. (`glide.knowman.show_user_feedback`)	Select one of the following options for showing user comments to users with roles set in the associated property: **When article loads**, **When user clicks link to show comments**, or **Never**.

List of roles (comma separated) that can create and view user comments on an article. (`glide.knowman.show_user_feedback.roles`)	Enter role names exactly as they appear in **User Administration > Roles**. If the **Show user comments on knowledge articles** property is selected, users with the roles listed here can create and view user comments on an article.
Maximum number of user comments displayed on a knowledge article. (`glide.knowman.feedback.display_threshold`)	Set a maximum number of user comments to display. This property applies only to the legacy Knowledge article view.
Use Live Feed for Knowledge feedback. (`glide.knowman.use_live_feed`)	Select this option to have comments on knowledge articles use record feeds.

Knowledge Search Properties

Knowledge search properties give you control over the search options available to users and the presentation of search results.

Property	Description
Knowledge search result order. (`glide.knowman.order.search`)	Select the order for displaying search results on the knowledge homepage. • **Number of Views:** orders search results based on the **Number of days used when summing article views** property. • **Relevancy:** orders search results based on content that is similar to the search term. • **Last Modified:** orders search results based on modification date.
Search method used when searching Knowledge from a task or directly in the Knowledge Base. (`glide.knowman.search.operator`)	Select the search approach to use when the search term includes multiple words. • **OR query:** returns articles that contain at least one word from the search term. • **AND then OR query:** first searches for articles that include all words in the search term (an AND query). If no matches are found, an OR query is performed.
Show author in knowledge search results. (`glide.knowman.search.show_author`)	Select this check box to include the author of each article in knowledge search results.
Show last modified date and time in knowledge search results. (`glide.knowman.search.show_last_modified`)	Select this check box to include the date and time each article was last edited in knowledge search results.
Show publish date in knowledge search results (`glide.knowman.search.show_published`)	Select this check box to include the date each article was published in knowledge search results.
Show category in knowledge search results. (`glide.knowman.search.show_category`)	Select this check box to include category breadcrumbs in knowledge search results.
Show number of views in knowledge search results. (`glide.knowman.search.show_view_count`)	Select this check box to include the number of times each article was viewed in knowledge search results.
Show relevancy in knowledge search results. (`glide.knowman.search.show_relevancy`)	Select this check box to include how relevant each result is based on the search string. Relevancy value is only shown when Knowledge search result order property is set to Relevancy.
Enable instant search results for knowledge. (`glide.knowman.search.instant_results`)	Select this check box to enable instant search for search results. The default is No.
Show article number in knowledge search results. (`glide.knowman.search.show_article_number`)	Select this check box to display the article number for each article in the search result.

Knowledge Homepage Properties

Knowledge homepage properties control the featured content on the knowledge homepage.

Property	Description
Default keyword for getting pinned articles. `(glide.knowman.default_keyword)`	Enter a default keyword for pinned articles. Articles pinned with the specified keyword appear in the Featured Content section of the knowledge homepage.
Default header title for the pinned articles section on knowledge home pages. `(glide.knowman.default_pinned_section_header_title)`	Enter a title for the Featured Content section of the knowledge homepage.

Other Knowledge Properties

Additional knowledge properties let you control general knowledge management features.

Property	Description
When attaching an article to an incident or catalog task, copy the content into this field. `(glide.knowman.attach.fields)`	When a user searches knowledge from a task form (incident, problem, change request, or other) and clicks the article's **attach to task** button, the system copies the article number and content into the field specified here. You can specify a separate field for each table you want to attach articles to as a comma-separated list. Use dot walking to copy the article content into related records. If a specified field does not exist, that field is ignored. For more information, see customizing the *attach to task* button. The contextual search feature replaces this behavior when contextual search is enabled for a task form.
Knowledge Management logo to display if running out of the ServiceNow frames. `(glide.knowman.frameless_logo)`	Click the reference lookup icon ( ) and choose an image file to be displayed on knowledge pages that are used outside of the ServiceNow application frames. For example, the logo image selected here appears if you create a Content Management System site that includes knowledge pages. You can also enter the **Name** of an image stored in the database to use that image. **Note:** *This property applies only to Knowledge v2 pages. This property is not supported on Knowledge v3 pages.*
The sys_id of the knowledge base when creating knowledge from task records. `(glide.knowman.task_kb)`	Enter the sys_id of the knowledge base to put new knowledge articles created from tasks in.
Before displaying an article's text in search results or the article view, check field-level ACLs on appropriate field: kb_knowledge.text (HTML article) or kb_knowledge.wiki (wiki text article). `(glide.knowman.text.check_can_read)`	Select this check box if users must have ACL-based permission to view text fields on the Knowledge [kb_knowledge] table to read article previews.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/product/knowledge-management/reference/r_KnowledgeProperties.html

Translating Knowledge

Translating Knowledge

Overview

Organizations with knowledge users who speak multiple languages can activate the optional knowledge internationalization features. When active, knowledge internationalization enables the knowledge management team to create language-specific knowledge articles and keep translations of the same article related to each other so they are easy to manage. Users can view and search within their own language while still being able to view articles in other languages when necessary.

Activating the Plugin

To enable translation of knowledge articles, you must activate multiple plugins:

- **I18N:Knowledge Management Internationalization v2** plugin
- Internationalization plugins for each appropriate language (for example, **I18N: French Translations** and **I18N: Korean Translations**)

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.
3. [Optional] If available, select the **Load demo data** check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.
4. Click **Activate**.

Installed Components

Activating the Knowledge Management Internationalization plugin installs these components:

- A relationship named **Translated Versions** that creates a related list on the Knowledge form showing other articles that have the same parent article.
- A business rule named **knowledge query** that automatically filters the knowledge portal and search results based on the user's selected language.
- A UI macro named **kb languages** (see Using the Translated Knowledge Base).
- Two fields, named **Language** and **Parent**, in the Knowledge [kb_knowledge] table and the Knowledge form.

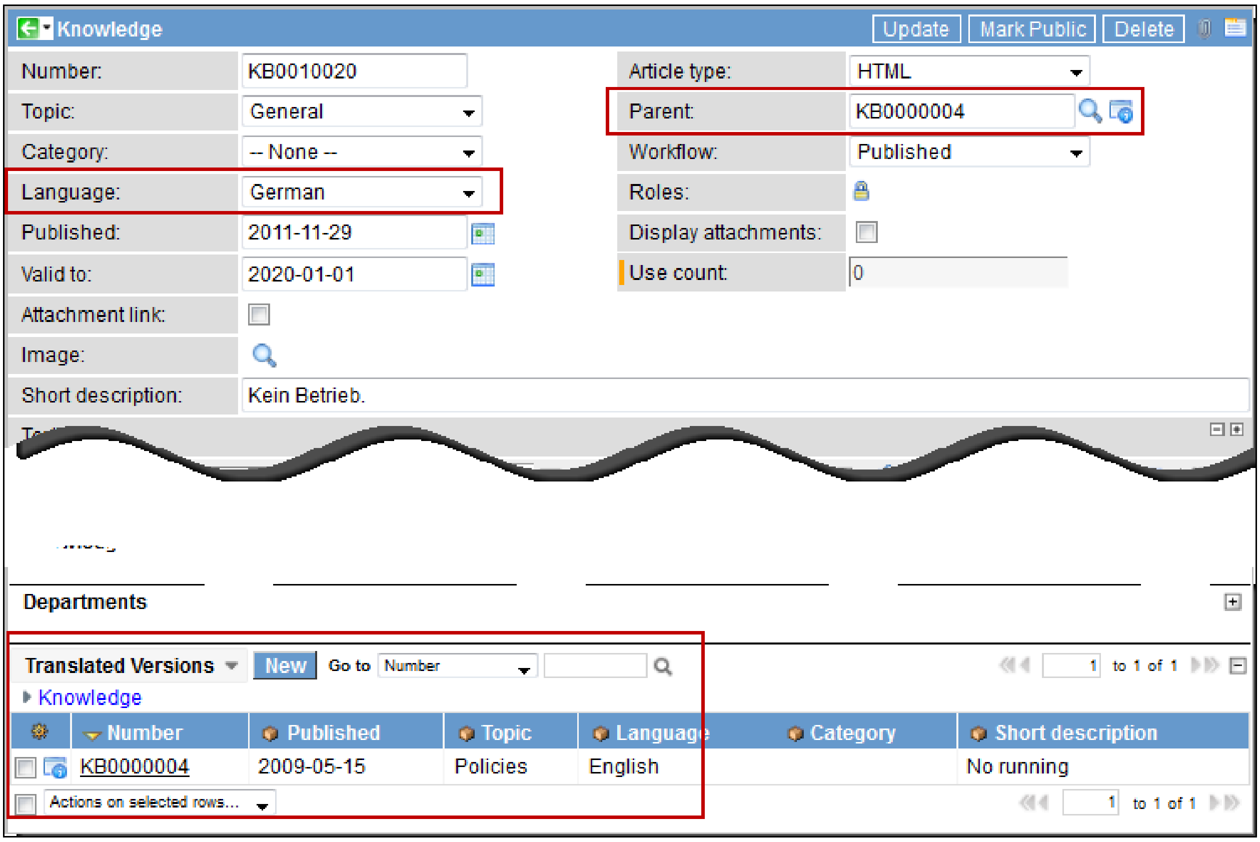
Knowledge Form Changes

Activating knowledge management internationalization adds these fields to the Knowledge form.

- **Language:** select the language for the article.
- **Parent:** enter the number of the article that represents the base language. This setting keeps translations of the same article related to each other. Consider choosing the same language consistently for the parent article.

Additionally, the **Translated Versions** related list is automatically added to the Knowledge form after you save an article.

In this illustration, the article being edited is the German version of an article which also exists in English (KB0000004). The English article appears in the the **Parent** field and in the **Translated Versions** related list.



Translating Knowledge

To translate a knowledge article:

1. Navigate to **Knowledge Base > Edit** and click **New**.
2. If needed, personalize the Knowledge form to add the **Language** and **Parent** fields.
3. Select the **Language** and the **Parent** knowledge article.
4. Enter the **Short Description** and **Text** in the selected language.
5. Fill out the rest of the Knowledge form as appropriate.

   For more information about fields on the Knowledge form, see Creating Knowledge.
6. Right-click the header bar and select **Save**.

   The **Translated Versions** related list appears at the bottom of the page, listing the parent article and all other articles assigned to the same parent article.

Changing Translation Methods from Translated Text

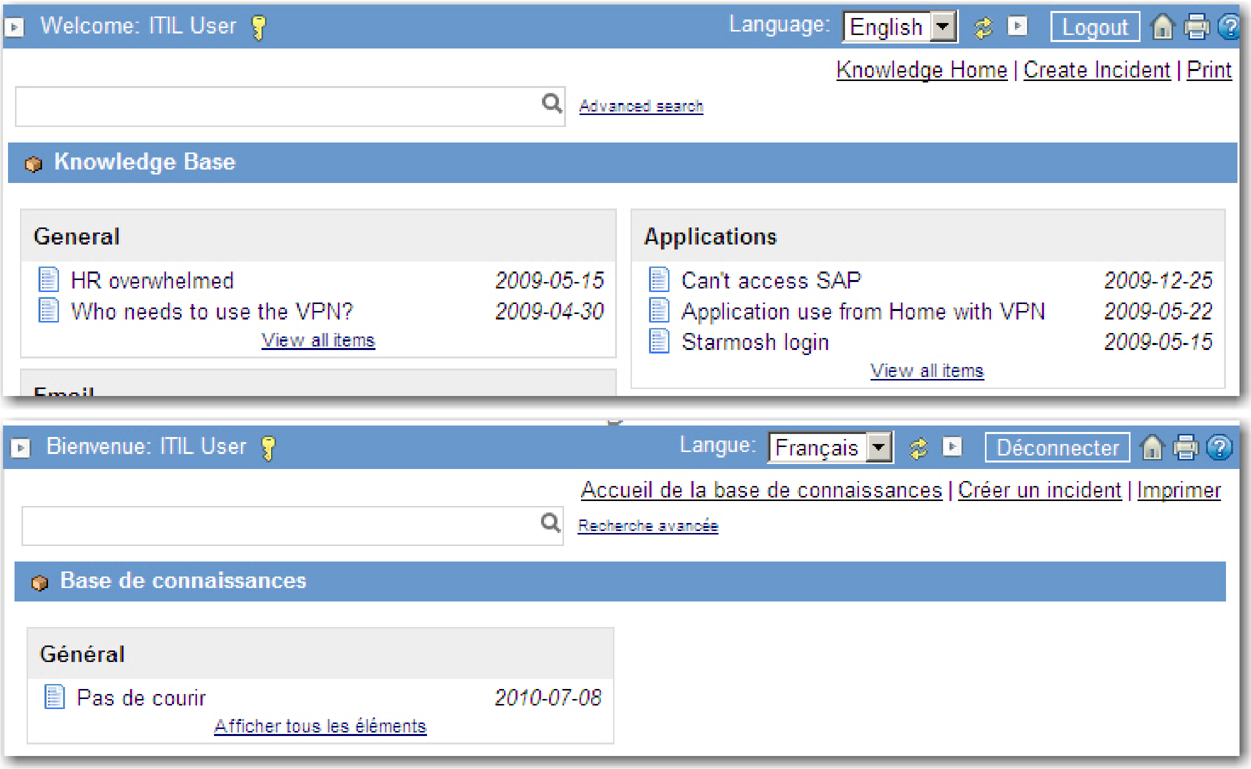
If articles were previously translated with the translated text and translated HTML methods, a fix job runs when you activate the Knowledge Management Internationalization plugin. The fix job turns the **Short Description** and **Text** fields into normal string and HTML fields. The translations are still stored in the **Translated Text** table, but new articles must be created to store those translations and make them visible to users with the method listed above.

The Knowledge Management Internationalization plugin eliminates the need to use the Translating New Customizations method to locate untranslated articles. The **Translated Versions** related list provides a simple method for tracking whether articles have been translated.

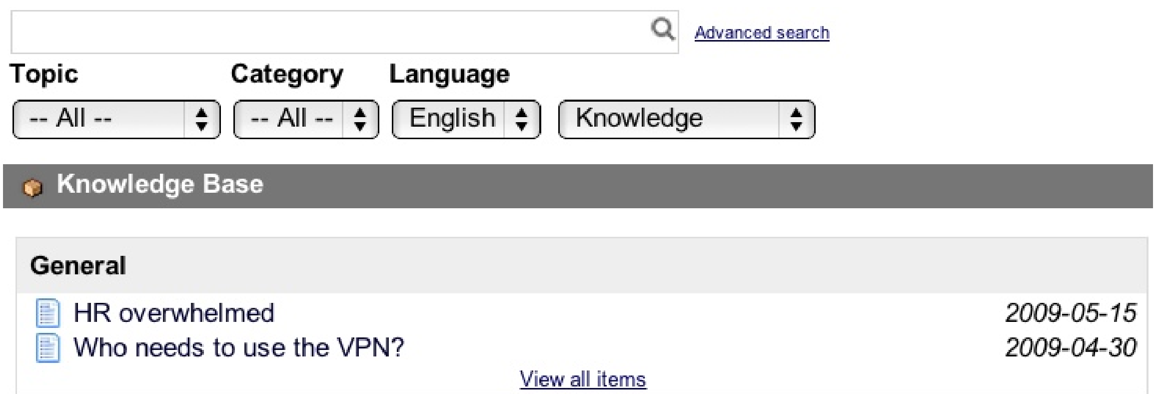
Using the Translated Knowledge Base

With knowledge internationalization, users can easily find articles in their own language.

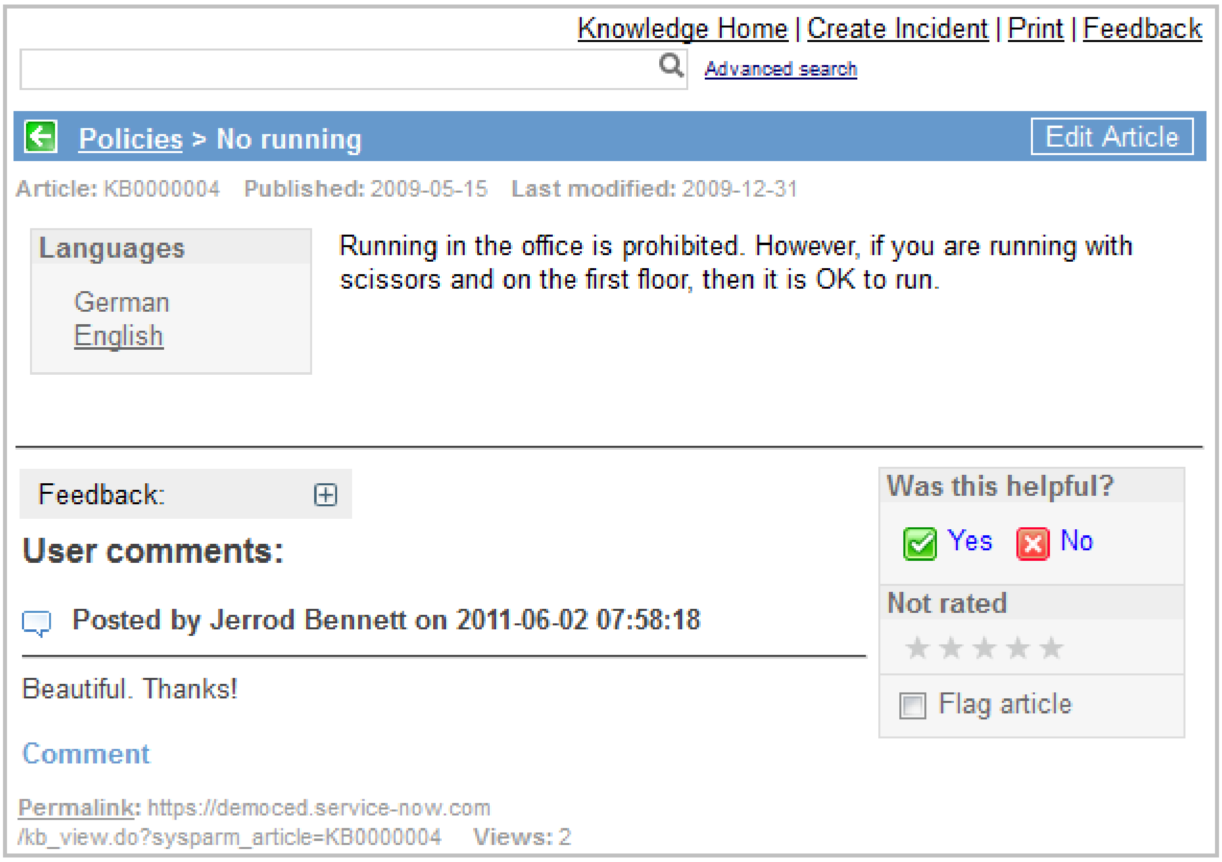
The knowledge portal and knowledge search automatically filter results based on the user's selected language.



Users can search in any available language through the **Advanced search** link in the knowledge search. The Zing search engine supports search terms with international characters.



If more than one translation of an article is available, article view includes a **Languages** box. When the user clicks a language link, ServiceNow loads the translated article title and text without reloading the page. The language links available are based on the relationships defined with the **Parent** field and the **Translated Versions** related list.



The language box is generated by the UI macro **kb_languages**. Administrators can restrict the language box to particular roles by adding the property `glide.knowman.show_language_options.roles` with a comma-separated list of roles. If the roles list is empty, the language box is available to all users, regardless of role. To remove the language box for all users, add the property `glide.knowman.show_language_options` and set it to **false**.

Tracking and Reporting on Knowledge

Reporting on Knowledge

Note: *This article applies to Fuji and earlier releases. For more current information, see Knowledge Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

Overview

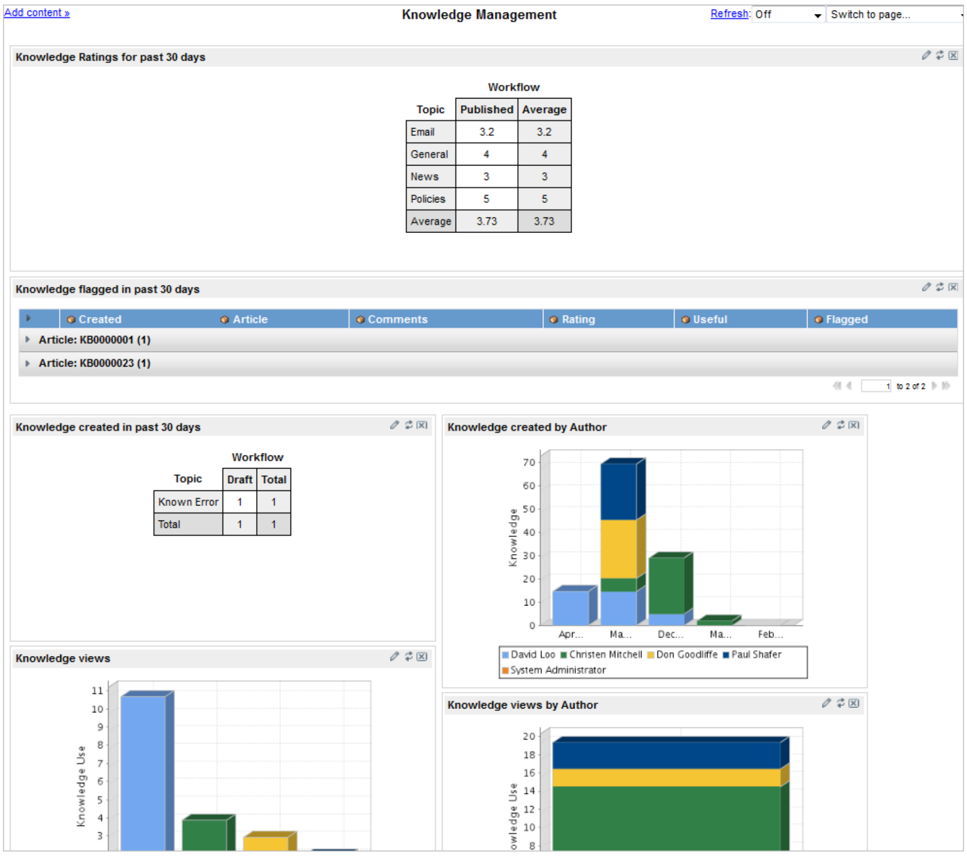
The following reports provide important information about your knowledge management processes.

- **Knowledge flagged in past 30 days:** grouped list report of articles that have been flagged as inaccurate or incomplete.
- **Knowledge created in past 30 days:** bar chart of new articles grouped by topic, stacked by category.
- **Knowledge created by Author:** monthly trend chart of articles created by each person.
- **Knowledge views:** bar chart of total views grouped by topic, stacked by article.
- **Knowledge views by Author:** monthly trend chart of total views grouped by author.
- **Knowledge use:** bar chart of articles attached to tasks grouped by topic, stacked by article.
- **Knowledge use by Author:** monthly trend chart of articles attached to tasks grouped by author.
- **Knowledge updated in past 30 days:** pivot table showing the number of articles drafted and published.
- **Knowledge by Workflow state:** pie chart of articles in each workflow state.
- **Knowledge Ratings for past 30 days:** tabular representation of article ratings by topic.

Most of these reports appear as gauges on the default Knowledge Management homepage. Users with role-based permission to access the Reports application can view all of the knowledge management reports with the Reports application.

Knowledge Management Homepage

The default Knowledge Management homepage includes many knowledge reports. This homepage is available to users with the admin or knowledge_admin roles by default.



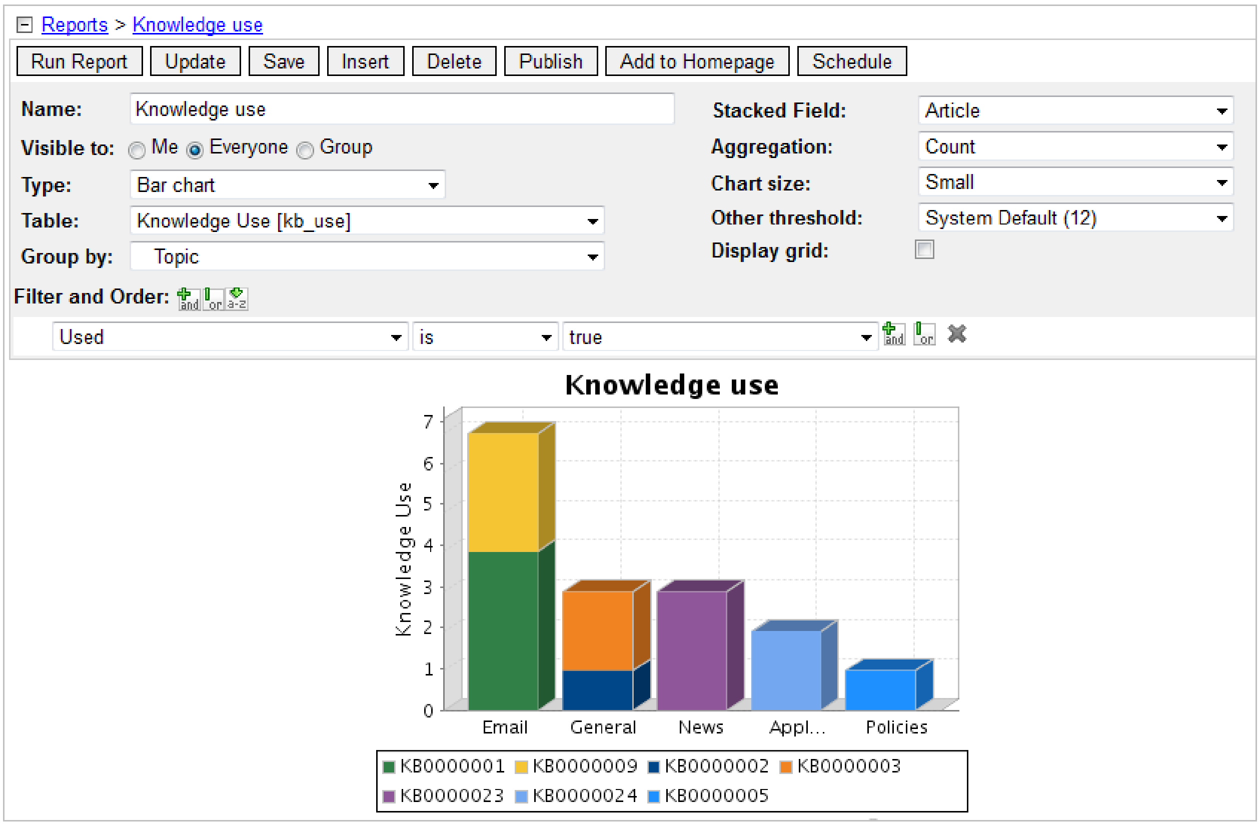
The Knowledge Management homepage provides the following functionality:

- Users with access to the Reports application can click an element in a report or chart to open a list filtered for that element. For example, in the **Knowledge by Workflow state** pie chart, click the **Published** pie slice to open the list of published articles. In the **Knowledge views** bar chart, click a bar to open the Knowledge Use list filtered for the selected topic.
- Users can customize the Knowledge Management homepage, adding, moving, and removing items to meet their own needs. These changes affect only their personal view of the homepage.
- Administrators can modify the homepage to make it available for users with other roles, to change the reports displayed and their arrangement, and to add other content. These changes affect all users who have not customized their personal view of the Knowledge Management homepage.

Knowledge Management Reports

Users with access to the Reports application can generate any of the knowledge management reports.

1. Navigate to **Reports > View / Run**.
2. Select a report from the **Knowledge Feedback**, **Knowledge**, or **Knowledge Use** section.
3. Use the report header to refine the report to meet your needs.



Click an element in a report or chart to open a list filtered for that element. For example, in the **Knowledge by Workflow state** pie chart, click the **Published** pie slice to open the list of published articles. In the **Knowledge views** bar chart, click a bar to open the Knowledge Use list filtered for the selected topic.

For more information about generating reports, see Creating Reports. For more information about using the report header to define a report, see the description of the specific report type.

Tracking Knowledge Articles

Overview

After the **Knowledge Base** application is set up and populated with information, the knowledge management team is responsible for keeping articles accurate, responding to end-user feedback, and continually improving the quality of the knowledge articles. The Knowledge Management homepage and the modules in the KCS section of the Knowledge Base application provide tools to gather information about user searches, feedback, and article use.

Using the Knowledge Management Homepage

Several knowledge management reports are included as gauges on the default **Knowledge Management** homepage, which is available to users with the admin or knowledge_admin role by default. Use these reports to track:

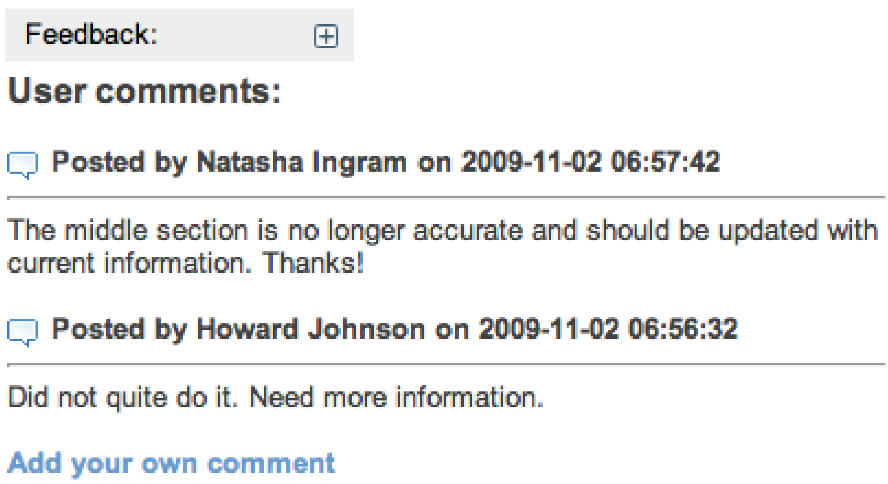
- Which articles are being highly rated and which are not.
- Which articles have been flagged by users as being incorrect or poorly written.
- Which knowledge authors have been creating the most content, and whose content is being viewed and used the most.
- Where articles are in the knowledge submission workflow process.

On the Knowledge Management homepage, click an element in a report or chart to open a list filtered for that element. For example, in the **Knowledge by Workflow state** pie chart, click the **Published** pie slice to open the list of published articles. In the **Knowledge views** bar chart, click a bar to open the Knowledge Use list filtered for the selected topic.

Tracking User Feedback

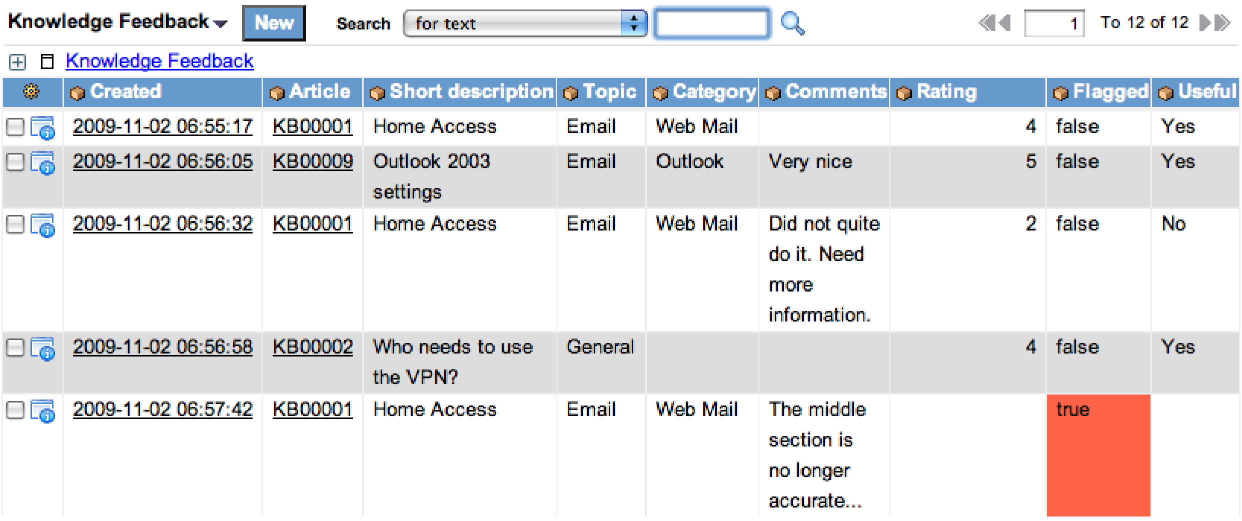
Users have up to four tools for submitting feedback, depending on administrator configuration. Users can respond to an article by:

- Posting a comment
- Answering **Was this helpful?**
- Rating the article
- Flagging the article



All of these responses are tracked as fields on the Knowledge Feedback [kb_feedback] table. Knowledge management team members (admin, knowledge_admin, and knowledge roles) can navigate to **Knowledge Base >**

Feedback to view feedback records.



Knowledge Feedback | New | Search for text | 1 To 12 of 12

Knowledge Feedback

Created	Article	Short description	Topic	Category	Comments	Rating	Flagged	Useful
2009-11-02 06:55:17	KB00001	Home Access	Email	Web Mail		4	false	Yes
2009-11-02 06:56:05	KB00009	Outlook 2003 settings	Email	Outlook	Very nice	5	false	Yes
2009-11-02 06:56:32	KB00001	Home Access	Email	Web Mail	Did not quite do it. Need more information.	2	false	No
2009-11-02 06:56:58	KB00002	Who needs to use the VPN?	General			4	false	Yes
2009-11-02 06:57:42	KB00001	Home Access	Email	Web Mail	The middle section is no longer accurate...		true	

Each type of feedback occupies its own field. (Configure the list to add fields that do not appear by default). If a single user responds to an article in multiple ways (for example, posting a comment and flagging an article), both types of feedback appear in the same record. However, if different users respond to the same article, these responses are stored in different records.

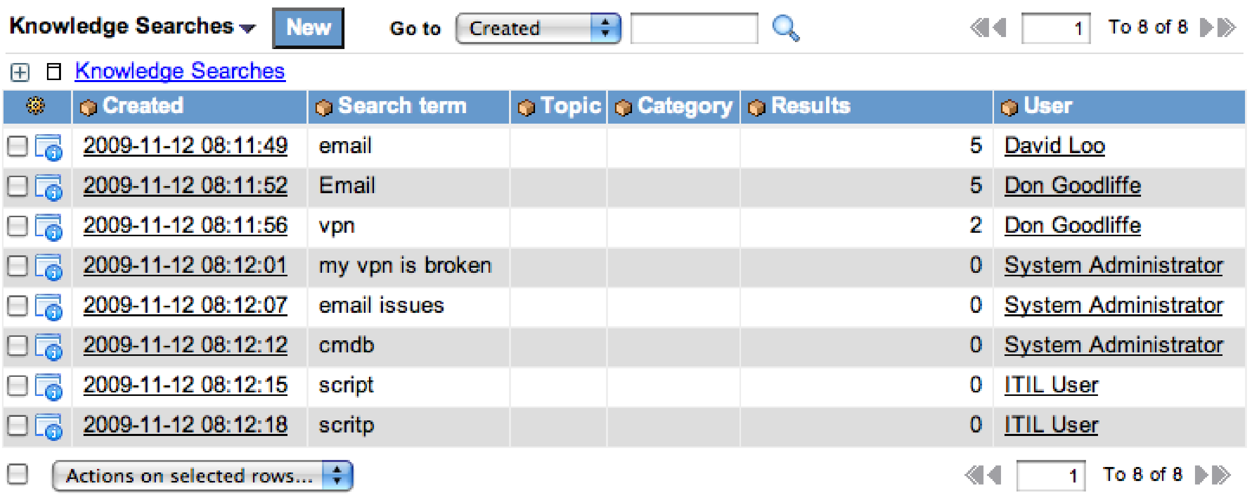
- Click the **Created** date to view the feedback record.
- Click the **Article** number to view the Knowledge record.

In addition to the Feedback module, team members with the admin or knowledge_admin role can view the list of flagged articles in the **Knowledge Base > Flagged Articles** module. These users can view ratings in the **Knowledge Base > Ratings** module.

Tracking User Searches

Team members with the admin or knowledge_admin role can view a history of all knowledge searches, showing what users are looking for and whether they're finding relevant information. If a lot of users are searching for similar terms but getting few results, there is a knowledge need that is not being met.

To track user searches, navigate to **Knowledge Base > Search Log**.



Knowledge Searches | New | Go to Created | 1 To 8 of 8

Knowledge Searches

Created	Search term	Topic	Category	Results	User
2009-11-12 08:11:49	email			5	David Loo
2009-11-12 08:11:52	Email			5	Don Goodliffe
2009-11-12 08:11:56	vpn			2	Don Goodliffe
2009-11-12 08:12:01	my vpn is broken			0	System Administrator
2009-11-12 08:12:07	email issues			0	System Administrator
2009-11-12 08:12:12	cmdb			0	System Administrator
2009-11-12 08:12:15	script			0	ITIL User
2009-11-12 08:12:18	scritp			0	ITIL User

Actions on selected rows... | 1 To 8 of 8

The search log shows:

- What text was searched for
- Who was searching

- How many results were found

Tracking Article Use

Administrators can configure and gather information from the **Knowledge Base** application to track article usage. For example, the administrator can:

- View raw information on the Knowledge Use [kb_use] table. To view this table, enter **kb_use.list** into the application navigator filter.
- Configure the Knowledge form to show information about article use.
- Add the **Use Count** field to show the number of tasks to which the article is attached.
- Add the **Attached to Task** related list to show tasks with article attachments. For more information, see Searching Knowledge from Forms.
- Add the **Knowledge Use->Article** related list to show all of the knowledge use records created for this article. These records indicate whether the article was viewed or attached to a task (form).
- Configure the article view to display a list of tasks the article attachments, for example:

Enhancing Knowledge Article Tracking

Overview

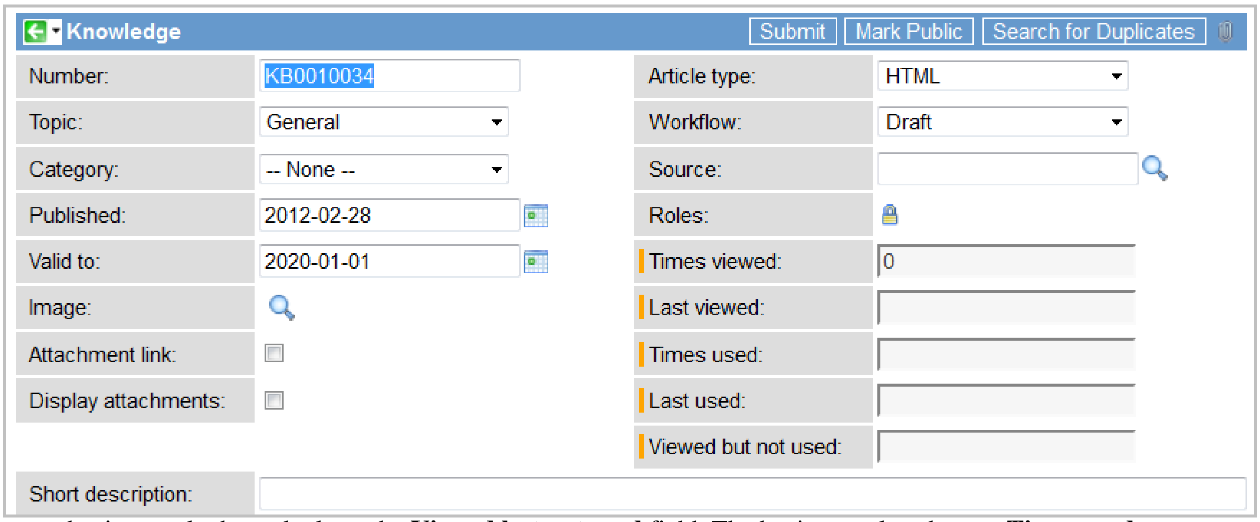
Administrators can customize the Knowledge Base application to provide additional reporting and searching capabilities. For the standard methods of tracking article use, see Tracking Knowledge Articles. Keep in mind that ServiceNow retains the customizations you apply to objects in the base system. System upgrades do not apply new features to customized objects.

> **Caution:** The customization described here was developed for use in specific ServiceNow instances, and is not supported by ServiceNow Customer Support. This method is provided as-is and should be tested thoroughly before implementation. Post all questions and comments regarding this customization to our community forum [1].

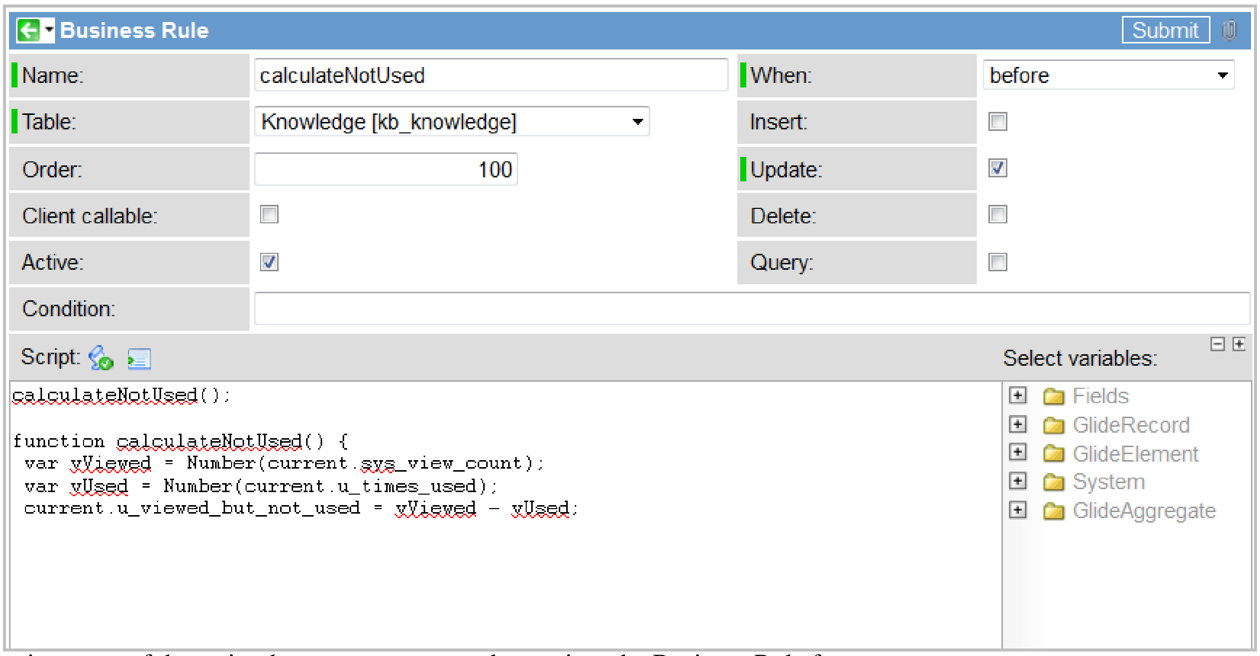
Knowledge Reporting Enhancements

Use these instructions and scripts to calculate the number of times an article is viewed but not attached to a task (such as an incident, problem, or change) and to track the last time an article was viewed. Then, use this information to enhance your knowledge reports.

1. Configure the Knowledge form by creating these new fields.
   - **Last viewed** (type is **Date-time**)
   - **Times used** (type is **Integer**)
   - **Last used** (type is **Date-time**)
   - **Viewed but not used** (type is **Integer**)
2. Add the **View count** field (which already exists) to the form. For consistency, you may want to change the label of this field to be **Times viewed**.
   Keep in mind that the **View count** field displays the number of times an article has been viewed in the last 30 days. (This default is controlled by a property that can be modified. Set the property value to 0 to consider all article views.)
3. Modify the dictionary entries for all of these fields and make them read-only. After you add the fields, the form looks something like this.



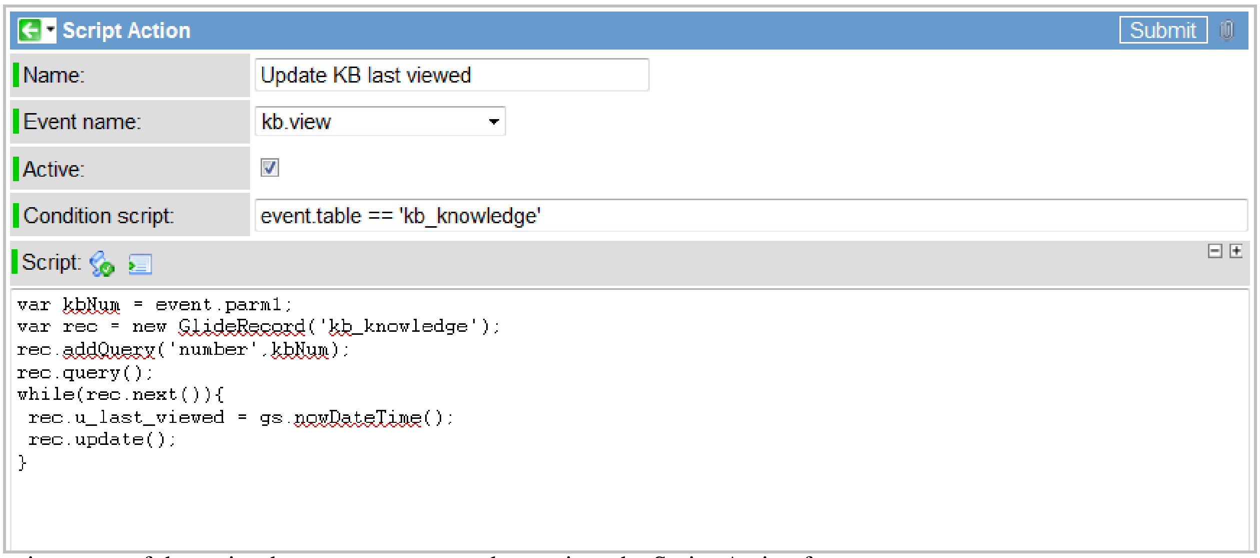
4. Create a business rule that calculates the **Viewed but not used** field. The business rule subtracts **Times used** from **Times viewed** each time the record is updated.



Here is a copy of the script that you can copy and paste into the Business Rule form:

```
calculateNotUsed();

function calculateNotUsed() {
 var vViewed = Number(current.sys_view_count);
 var vUsed = Number(current.u_times_used);
 current.u_viewed_but_not_used = vViewed - vUsed;
}
```

5. Navigate to **System Policy > Script Actions** and create a new script action that updates the **Last viewed** time stamp when it identifies that a knowledge article has been viewed. The script should look like this:



Here is a copy of the script that you can copy and paste into the Script Action form:

```
var kbNum = event.parm1;
var rec = new GlideRecord('kb_knowledge');
rec.addQuery('number',kbNum);
rec.query();
while(rec.next()){
```

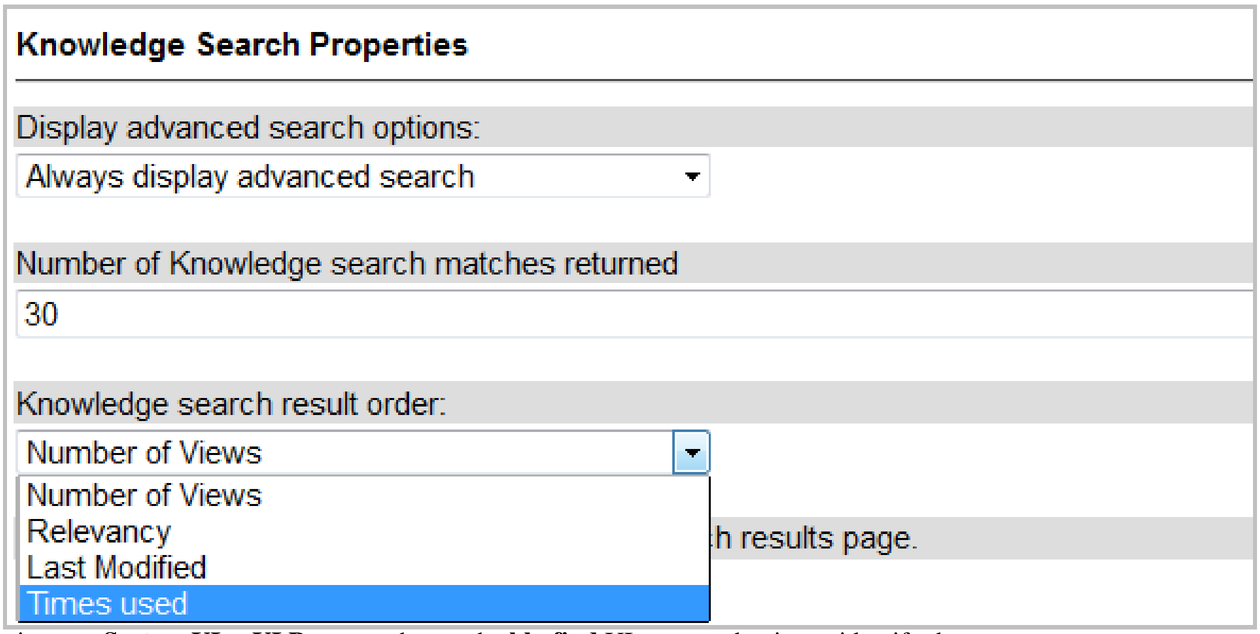
```
 rec.u_last_viewed = gs.nowDateTime();
 rec.update();
}
```

Knowledge Search Enhancements

Now that you're collecting information about the number of times an article has actually been used in an incident, you may want to order search results by this number. To do this, modify two records in the *System Properties* table.

1. In the navigation filter, enter **sys_properties.list** to open the *System Properties* table.
2. Open the **glide.knowman.order.search** record.
3. in the **Choices** field, add **Times used=u_times_used** at the end.
4. Click **Update**.
5. Open the **glide.knowman.section_sort** record.
6. in the **Choices** field, add **Times used=u_times_used** at the end.
7. Click **Update**.
8. Navigate to **Knowledge Base > Properties** and find the **Knowledge search result order** property.

   You can now select **Times used** for sorting search results.



9. Navigate to **System UI > UI Pages** to change the **kb_find** UI page so that it can identify these new sort parameters.
10. Open the **kb_find** UI page.
11. Replace the contents of the **HTML** field with the code below.
12. Click **Update**.

```
if (sortSequence != 'relevancy') {
 if (sortSequence == 'views'){
 kb.orderByDesc('sys_view_count');
 }
 else{
 kb.orderByDesc('u_times_used');
 }
}
```

Using Knowledge Search for Tasks

If you want to expand the knowledge search capabilities to include incident, problem, and change request records as well, use the Searching Tasks with **kb_find** script. This script is a modification of the **kb_find** UI page in the base system. It modifies the existing knowledge search functionality by returning results from the Incident, Problem, and Change Request tables as well as the knowledge base, enabling a kind of global search.

Note: *Searching returns only those records the user has role-based permissions to view.*

The following script returns a maximum of 20 results from the Task tables to avoid returning potentially thousands of results. You can change the number of results by modifying the `var maxTasks = 20;` line below. To implement this script and other **kb_find** modifications in this article:

1. Navigate to **System UI > UI Pages**.
2. Open the **kb_find** page.
3. Replace the script in the **HTML** field with the code below.
4. Click **Update**.

View the script

```
<?xml version="1.0" encoding="utf-8" ?>

<!--

 Knowledge management v2 - list viewer

-->

<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null" xmlns:g2="null">

  <link href="kb_styles.cssx" type="text/css" rel="stylesheet" />

  <SCRIPT LANGUAGE="JavaScript" SRC="kb.jsx?v=${gs.getProperty('glide.builddate')}" />



  <g2:evaluate jelly="true" var="jvar_item">

    var kb = new GlideRecord('kb_knowledge');

    var kb1 = new GlideRecord('u_kb_lookup');

    kb1.initialize();

    var task = new GlideRecord('task');

    var qc = task.addQuery('sys_class_name', 'problem');

    qc.addOrCondition('sys_class_name', 'incident');

    qc.addOrCondition('sys_class_name', 'change_request');

    <!--task.orderByAsc('number');-->




    var operator = 'IR_AND_QUERY';

    if (jelly.sysparm_operator)

      operator = jelly.sysparm_operator;



    if (jelly.sysparm_search $[AND] jelly.sysparm_search.length != 0){

      kb.addQuery(operator, jelly.sysparm_search);

      kb1.u_search_term = jelly.sysparm_search;

      task.addQuery(operator, jelly.sysparm_search);

    }
```

```
    if (jelly.sysparm_topic $[AND] jelly.sysparm_topic.length != 0
$[AND] jelly.sysparm_topic != 'null') {
      gs.print("adding topic = " + jelly.sysparm_topic);
      kb.addQuery('topic', jelly.sysparm_topic);
      kb1.u_topic = jelly.sysparm_topic;
    }

    if (jelly.sysparm_category $[AND] jelly.sysparm_category.length !=
0 $[AND] jelly.sysparm_topic != 'null') {
      gs.print("adding category = " + jelly.sysparm_category);
      kb.addQuery('category', jelly.sysparm_category);
      kb1.u_category = jelly.sysparm_category;
    }

    kb.addQuery('active', 'true');
    kb.addQuery('workflow_state', 'published');
    var orderField = 'relevancy';
    var sortSequence = gs.getProperty('glide.knowman.order.search');
    if (sortSequence != 'relevancy') {
      if (sortSequence == 'views'){
        kb.orderByDesc('sys_view_count');
        orderField = 'view count';
      }
      else{
        kb.orderByDesc('u_times_used');
        orderField = 'times used';
      }
    }
    kb.query();

  <j2:if test="$[gs.hasRole('itil')]">
    task.query();
  </j2:if>

    var kbCount = kb.getRowCount();
    var taskCount = task.getRowCount();
    kb1.u_results_returned = kbCount;

    if (jelly.sysparm_search $[AND] jelly.sysparm_search.length != 0){
      kb1.u_user = gs.getUserID();
      kb1.insert();
    }
  </g2:evaluate>

  <table class="wide" cellspacing="0"  border="0" style="margin-bottom: 8px;">
    <tr>
      <td class="title" nowrap="true" colspan="99">
```

```
          <g:inline template="kb_header.xml" />

      </td>

    </tr>

  </table>

  <table class="wide" cellspacing="0" border="0" style="margin-bottom: 8px;">

    <tr class="header" border="0" cellspacing="0">

      <td class="column_head" colspan="3">

        <table border="0" cellspacing="0" cellpadding="0">

        <tr class="header" border="0" cellspacing="0">

          <form method="GET" action="${sysparm_base_form}.do" name="${sysparm_base_form}.do">

            <input type="HIDDEN" name="sys_action" value="none" />

            <g2:emitParms suppress="sysparm_this_url_enc" />

              <input type="HIDDEN" name="sysparm_modify_check" value="true" />

            <td>

              <input type="HIDDEN" id="sysverb_back" />

            <img name="not_important"

                value="sysverb_back"

              id="sysverb_back"

              onClick="return
gsftSubmit(document.getElementById('sysverb_back'));"

              src="images/green_back.gifx"

              title="${gs.getMessage('Back')}"

              alt="${gs.getMessage('Back')}"

                style="cursor:hand; margin-left: 4px;"/>

            </td>

          </form>

          <td>

              <div class="caption" style="margin-top: 2px;">

              $[gs.getMessage('kb.banner.title')]

              $[gs.getMessage('search results')]

            ($[kbCount] $[gs.getMessage('results')]
$[gs.getMessage('sorted by')] $[gs.getMessage(orderField)])

            </div>

          </td>

        </tr>

      </table>

      </td>

    </tr>

  <j2:set var="jvar_printed_some" value="false"/>

  <j2:set var="jvar_printed_some_task" value="false"/>


  <g2:inline template="kb_search_results.xml"/>


  <j2:if test="$[jvar_printed_some == false]">

  <g2:evaluate var="jvar_item" expression="gs.flushMessages();"/>

    <tr>

      <td>
```

```
        <div class="kb_no_text">Your search - <span class="kb_stand_out">$[sysparm_search]</span> - did not match any documents.</div>

      </td>

    </tr>

  </j2:if>


    <g2:evaluate>

      var ctr = 0;

      var maxTasks = 20;

      if (taskCount > maxTasks){

        taskCount = maxTasks;

      }

    </g2:evaluate>


    <tr border="0" cellspacing="0"><td><br /></td></tr>


    <tr class="header" border="0" cellspacing="0">

      <td class="column_head" colspan="3">

        <table border="0" cellspacing="0" cellpadding="0">

          <tr class="header" border="0" cellspacing="0">

            <form method="GET" action="${sysparm_base_form}.do" name="${sysparm_base_form}.do">

              <input type="HIDDEN" name="sys_submitted" value="false" />

              <input type="HIDDEN" name="sys_action" value="none" />

              <g2:emitParms suppress="sysparm_this_url_enc" />

              <input type="HIDDEN" name="sysparm_modify_check" value="true" />

              <td>

                <input type="HIDDEN" id="sysverb_back" />

                  <img name="not_important"

                    value="sysverb_back"

                    id="sysverb_back"

                    onClick="return
gsftSubmit(document.getElementById('sysverb_back'));"

                    src="images/green_back.gifx"

                    title="${gs.getMessage('Back')}"

                    alt="${gs.getMessage('Back')}"

                    style="cursor:hand; margin-left: 4px;"/>

              </td>

            </form>

            <td>

              <div class="caption" style="margin-top: 2px;">

                $[gs.getMessage('Task results ')]($[taskCount]
$[gs.getMessage('results')])

              </div>

            </td>

          </tr>

        </table>

      </td>

    </tr>
```

```
  <j2:set var="jvar_print_section" value="false"/>
  <j2:while test="$[ctr != maxTasks]">
    <g2:evaluate>
      <j2:if test="$[task.next()]">
        <j2:set var="jvar_print_section" value="true"/>
      </j2:if>
    </g2:evaluate>
    <j2:if test="$[jvar_print_section == true]">
    <j2:set var="jvar_printed_some_task" value="true"/>
    <j2:set var="jvar_task_link" value="task.do?sys_id=$[task.sys_id]"/>
    <tr>
      <td>
        <div style="margin-top: 10px;"></div>
        <g2:evaluate var="jvar_desc">
          var answer = task.short_description;
          answer;
        </g2:evaluate>
        <div>
          <a href="$[jvar_task_link]" class="kb_search_header"><g2:highlighter search="$[sysparm_search]">$[jvar_desc]</g2:highlighter></a>
        </div>
        <div><g2:highlighter search="$[sysparm_search]">$[task.description]</g2:highlighter></div>
        <div class="kb_add_info">
          Result type:$[SP]<font style="text-transform: uppercase;">$[task.sys_class_name]</font>$[SP]>
          <j2:set var="jvar_got_stackname" value="$[sysparm_nameofstack.length() > 0]"/>
          <j2:if test="$[jvar_got_stackname == false]">
            <a class="kb_add_info_link" href="task.do?sys_id=$[task.sys_id]">$[task.number]</a>
          </j2:if>
        </div>
      </td>
    </tr>
  </j2:if>
  <g2:evaluate>
    ctr++;
  </g2:evaluate>
  <j2:set var="jvar_print_section" value="false"/>
</j2:while>

<j2:if test="$[jvar_printed_some_task == false]">
  <g2:evaluate var="jvar_item" expression="gs.flushMessages();"/>
  <tr>
    <td>
      <div class="kb_no_text">Your search - <span class="kb_stand_out">$[sysparm_search]</span> - did not match any tasks.</div>
    </td>
  </tr>
</j2:if>
```

```
  </table>

</j:jelly>
```

Custom Knowledge Search from Multiple Fields

When searching the knowledge base from a task record, it might be helpful to use multiple fields from the form as your search query. You can accomplish this by modifying the dictionary for the search field and creating an *onLoad()* client script. For more information, see Administering Knowledge Search.

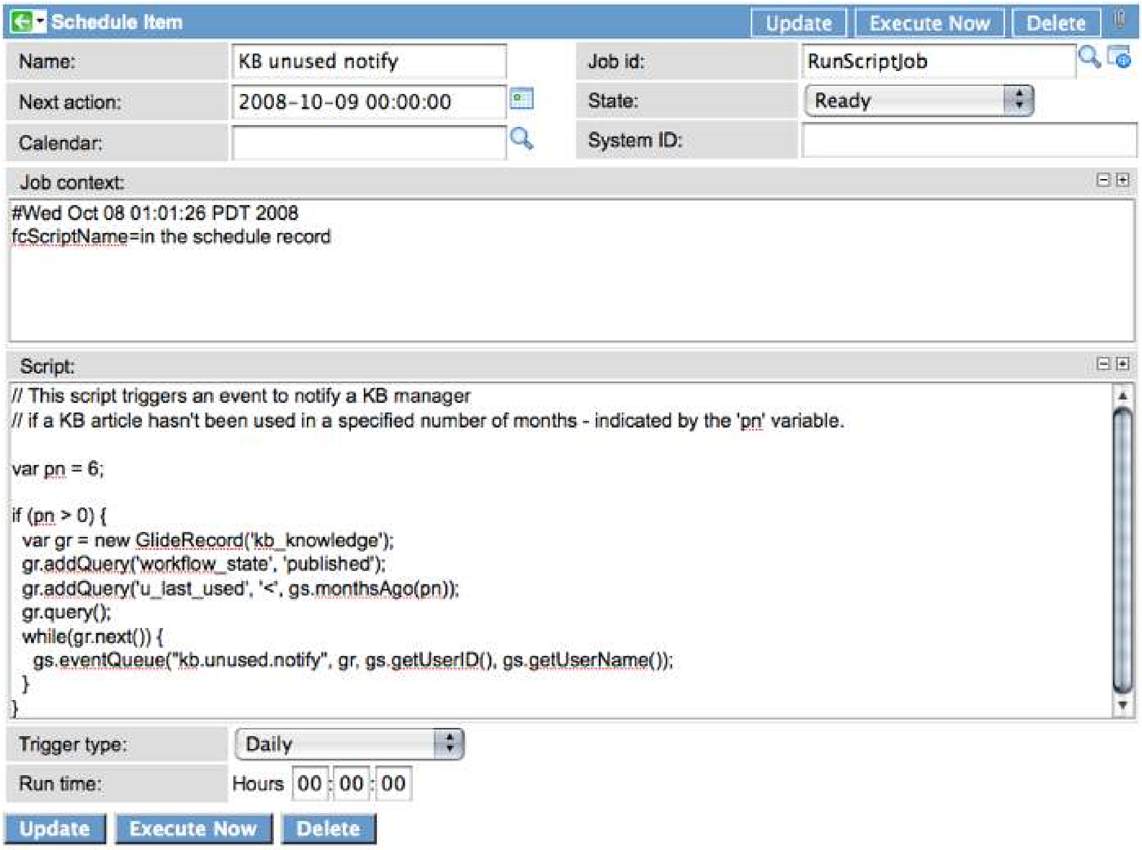
Notification of Rarely-Used Knowledge Articles

You can create a report that shows which articles have not been used for a specific period of time. Optionally, you may want to trigger some sort of event, like an email notification to a Knowledge Manager, if an article hasn't been used recently. To do this, create a new schedule item, a new event, and a new email notification.

To create the new schedule:

1. Navigate to **System Scheduler > Scheduled Jobs > Scheduled Jobs**.

   You may need to activate this application.
2. Create a new schedule item that looks like this. Note that the **Job context** field must contain `fcScriptName=in the schedule record`.



Schedule Item — Update | Execute Now | Delete

Name:	KB unused notify	Job id:	RunScriptJob
Next action:	2008-10-09 00:00:00	State:	Ready
Calendar:		System ID:	

Job context:

```
#Wed Oct 08 01:01:26 PDT 2008
fcScriptName=in the schedule record
```

Script:

```
// This script triggers an event to notify a KB manager
// if a KB article hasn't been used in a specified number of months - indicated by the 'pn' variable.

var pn = 6;

if (pn > 0) {
  var gr = new GlideRecord('kb_knowledge');
  gr.addQuery('workflow_state', 'published');
  gr.addQuery('u_last_used', '<', gs.monthsAgo(pn));
  gr.query();
  while(gr.next()) {
    gs.eventQueue("kb.unused.notify", gr, gs.getUserID(), gs.getUserName());
  }
}
```

Trigger type: Daily

Run time: Hours 00 : 00 : 00

Update | Execute Now | Delete

3. Use the script below to copy and paste into the *Schedule* form:
4. Create an event called **kb.unused.notify** to complete the implementation.
5. Register the event.
6. Create an email notification to alert the Knowledge Manager of the rarely used articles.

   The script triggers a **kb.unused.notify** event that you can then use to trigger an email notification. Make sure that this event exists in the event registry before selecting it in the email notification. For more information, see Events and Email Notification.

View the script for the* Schedule *form

```
// This script triggers an event to notify a Knowledge Manager
// if a knowledge base article hasn't been used in a specified number
of months -
// indicated by the <tt>pn</tt> variable.

var pn = 6;

if (pn > 0) {
 var gr = new GlideRecord('kb_knowledge');
 gr.addQuery('workflow_state', 'published');
 gr.addQuery('u_last_used', '<', gs.monthsAgo(pn));
 gr.query();
 while(gr.next()) {
 gs.eventQueue("kb.unused.notify", gr, gs.getUserID(),
gs.getUserName());
 }
}
```

Additional Knowledge Base Modifications

Additional knowledge base changes that may be helpful include:

- Configure the Knowledge form and add the **CI** field so that you can track knowledge articles for a particular CI.
- Configure the Knowledge form and add the **Meta** field so that you can add search keywords that make it easier to target knowledge articles.

References

[1] http://community.service-now.com

Article Sources and Contributors

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