

Knowledge Reference

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 **The ServiceNow Wiki is no longer being updated.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

Knowledge management allows users to create, edit, and view knowledge articles to share information across the organization.

Knowledge articles are pieces of knowledge, such as a policy or release notes. Each article exists within a knowledge base, which is managed by one or more knowledge managers.

Users can browse and search knowledge using a knowledge homepage or contextual search from other ServiceNow applications. Knowledge authors can contribute articles. Administrators can create multiple knowledge bases and assign these knowledge bases to individual managers responsible for controlling the behavior and organizational scheme of each knowledge base.



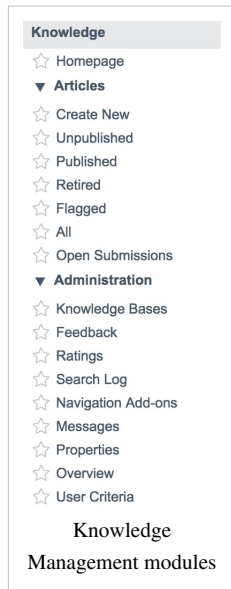
Note: The content on this page describes the Knowledge Management v3 feature, available starting with the Fuji release. See *Legacy:Knowledge Management* for information about knowledge functionality in versions prior to Fuji. For instances that upgraded to Fuji, see *Migrating to Knowledge Management v3*.

Roles

Name	Description
Any role	All users with at least one ServiceNow role can create and edit knowledge articles. Some knowledge bases may limit this to only certain users.
knowledge	Users with the knowledge role can contribute to the default knowledge base and access the Knowledge application menu.
knowledge_manager	Knowledge managers perform administrative functions for knowledge bases they manage such as defining categories, pinning important articles, and approving changes to articles. Users selected as managers of a knowledge base receive this role automatically.
knowledge_administrator	Knowledge administrators can manage the default knowledge base.
admin	Administrators create new knowledge bases, configure knowledge workflows, set knowledge properties, and manage knowledge forms and homepages.

Menus and Modules

Knowledge management contains these modules. The Homepage module and modules in the Articles section are available to users with the knowledge or knowledge_manager roles. Modules in the Administration section are available only to administrators.



- **Homepage:** View the knowledge homepage that allows users to search and browse knowledge.
- **Articles**
 - **Create New:** Create a new knowledge article.
 - **Unpublished:** View and edit knowledge articles that have the workflow state of **Draft** or **Review**.
 - **Published:** View and edit published knowledge articles.
 - **Retired:** View and edit retired knowledge articles.
 - **Flagged Articles:** View articles that a user flagged for review.
 - **All:** View and edit all articles.
 - **Open Submissions:** View active knowledge submissions created from tasks.
- **Administration**
 - **Knowledge Bases:** Create, view, and edit knowledge bases.
 - **Feedback:** View feedback records.
 - **Ratings:** View feedback records where a user provided a numerical rating, or where a user indicated the article was useful or not useful.
 - **Search Log:** Track user searches to determine search trends and identify popular content.
 - **Navigation Add-ons:** Configure legacy knowledge portal add-ons.
 - **Messages:** Customize and localize the text that appears in knowledge bases, such as button labels, category names, and feedback options.
 - **Properties:** Configure knowledge properties.
 - **Overview:** View the Knowledge Management homepage that shows reports about knowledge usage.
 - **User Criteria:** Define user criteria records to control access to knowledge.

In addition, two knowledge modules in the Self-Service application are available to all users:

- **Knowledge:** View the knowledge homepage that allows users to search and browse knowledge.
- **My Knowledge Articles:** View and edit knowledge articles authored by the logged-in user.

References

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

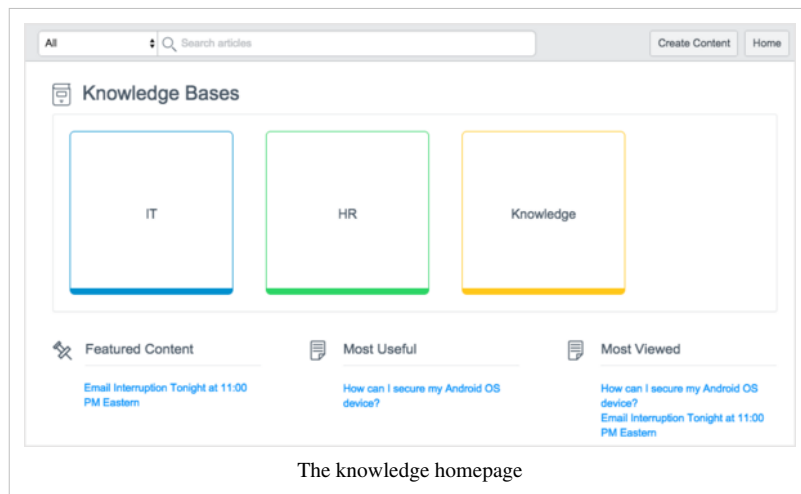
Using Knowledge

Overview

You can browse and search for articles that are configured to grant you access, and submit feedback on those articles. You must have at least one ServiceNow role to contribute content.

Viewing Knowledge

To view the default knowledge homepage navigate to **Self-Service > Knowledge**.



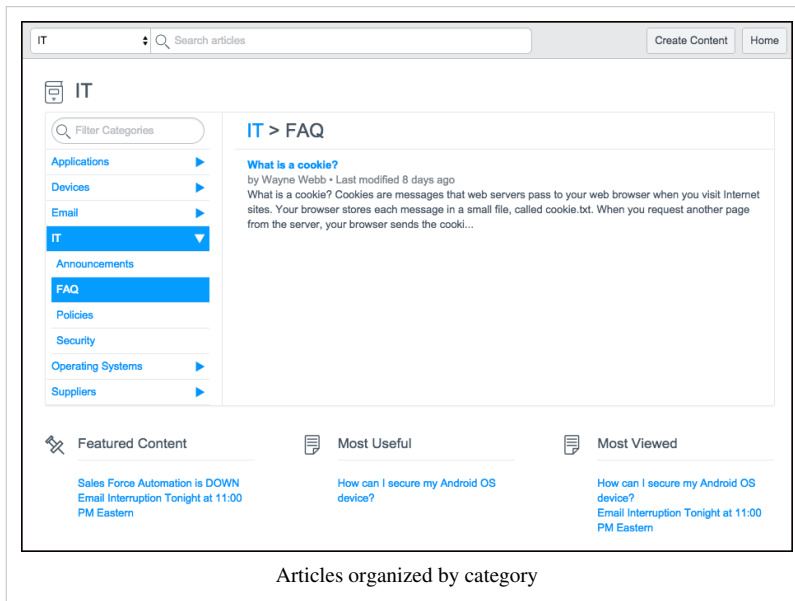
The knowledge homepage displays knowledge articles organized by knowledge base and category, as well as featured content and popular articles.



Note: The knowledge homepage is not compatible with Internet Explorer 9 or earlier. Using one of these browsers will cause you to be redirected to the legacy knowledge portal.

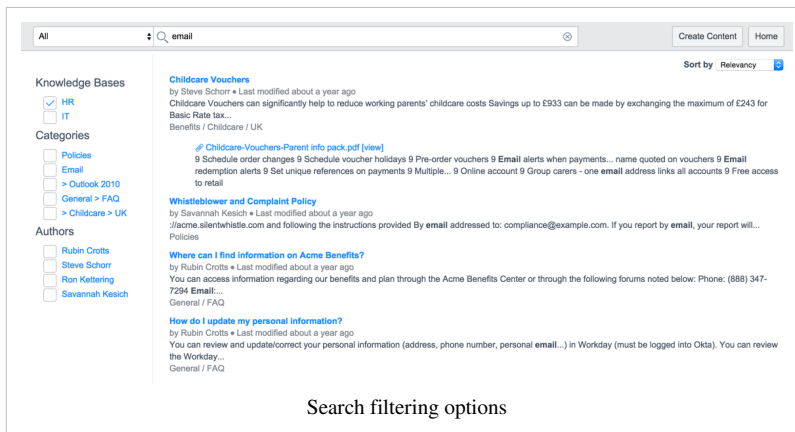
Browsing Articles

From the knowledge homepage, you can select a knowledge base to browse articles within that knowledge base. You can view only knowledge bases you can access. Articles are organized by category.



can access. If you do not select a specific knowledge base, search results include articles from all knowledge bases that you can access. You can also select a knowledge base from the choice list in the search bar.

- **Categories:** select one or more knowledge categories.
- **Authors:** select one or more authors.



- View comments, add a new comment, or reply to existing comments.

Users can view comments directly on the article. Knowledge managers can view the other types of feedback by navigating to **Knowledge > Feedback**.

Administrators and knowledge managers can disable some feedback options using fields on the Knowledge Base form. Administrators can configure feedback options using properties.

Searching Knowledge

You can search for knowledge articles from the knowledge homepage using the search bar at the top of the page. Search results include only articles the current user can read. Documents that are attached to articles are also listed in the search results (for those articles to which you have access).

You can sort results by relevancy, most recent update, or number of views.

You can filter results in these ways:

- **Knowledge Bases:** select a knowledge base to search. You can select only knowledge bases you

Using Knowledge Feedback

You can view and contribute to feedback on knowledge articles.

- Flag an article as incorrect or inappropriate.
- Provide a rating value for the article.
- Mark an article as helpful or not helpful.

Flagging Articles

You can flag an article for incorrect or inappropriate content. Click **Flag Article** in the article header to open a new window, allowing you to enter suggested changes.

Suggestions you make when flagging an article do not appear in the public comments for that article.

Rating Articles

The five stars below the article title allow you to indicate the article's effectiveness on a scale of 1 to 5.

Marking Articles

The question *Helpful?* at the bottom of the article allows you to indicate the usefulness of the article with a simple **Yes** or **No** answer.

Using Comments

Knowledge comments at the bottom of the article use document live feed to enable a conversation around a knowledge article. For example, you can post replies to comments, add attachments, or *Like* comments.

Requesting a Knowledge Base

You can request a knowledge base through the service catalog. You are notified when the request is approved or rejected. If the request is approved, you are added as the owner of the new knowledge base. You can then assign managers and manage articles in the new knowledge base. Knowledge bases created through this request process are inactive by default.

To request a new knowledge base navigate to **Service Catalog > Catalogs**, select **Can We Help You?**, and then select the **Request Knowledge Base** item.

Creating Knowledge



Note: This article applies to Fuji. For more current information, see *Create a Knowledge Article* ^[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

Users with at least one role can create and publish knowledge. Users without any role can read articles and submit feedback but cannot create or edit articles.

Some knowledge bases may allow only certain users to contribute. For example, a member of the IT department can create knowledge articles in the IT knowledge base, such as desktop support information or articles describing company IT processes.

Creating Knowledge

1. Navigate to **Self-Service > Knowledge**.
2. Click **Create Content**.

Note: The Create Content button is not displayed unless users have user criteria contribute permissions. See *Migrating to Knowledge Management v3*.

1. Enter details for the article (see table).
2. Click **Submit** to create the article.

Any additional steps required to publish the article, such as approvals, depend on the publishing workflow for the knowledge base.

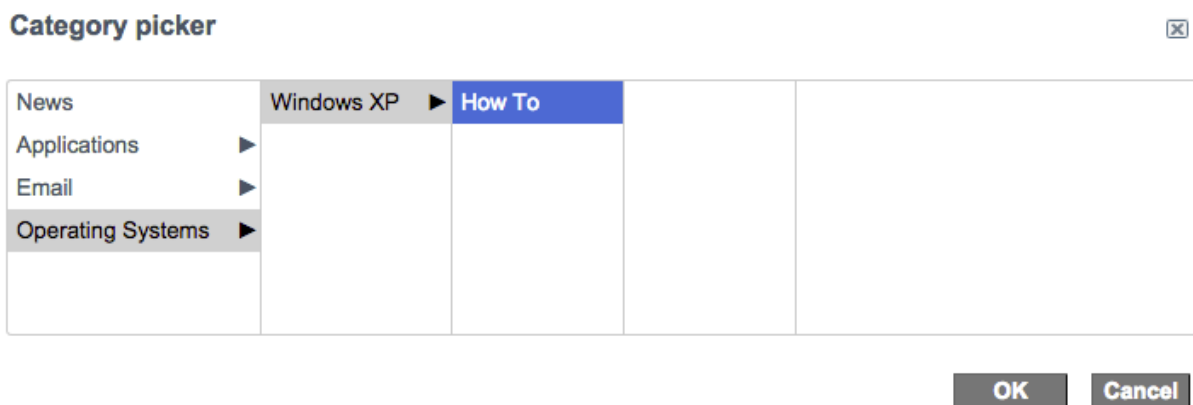
Field	Description
Number	The knowledge article number.
Knowledge Base	The selected knowledge base for that article.
Category	The category for this knowledge article. You must select a Knowledge Base before you can select a category.
Published	When this knowledge article was published. This value is set when the article is created, and updated when the article is published.
Valid to	When this knowledge article expires. Articles do not appear when browsing or searching after the valid to date, or if the valid to date is empty.
Image	An image that appears beside the article when searching from the legacy knowledge portal.
Workflow	[Read-Only] The publication state of the article, such as Draft or Published . When inserting a new article from an existing article, the state of the new article is reset to Draft .
Source	The task this knowledge article was created in response to, if any. This field is set automatically when you create the knowledge article from a task record.
Attachment link	Check box for downloading an attached file automatically when a user accesses the article, instead of opening the article view. You must add an attachment to the article to use this option.
Display attachments	Check box for displaying attachments to users viewing this knowledge article. Attachments appear below the article text. You must add one or more attachments to the article to use this option.
Short description	The title of the article. This title appears when browsing and searching knowledge, and at the top of the article.

Text Content for the article. Use the WYSIWYG HTML editor to create content. A preview of the content appears when browsing and searching knowledge.

Selecting a Category

Knowledge articles within a knowledge base are grouped by category. These groups can help you define the knowledge base taxonomy, and can help users find articles within that knowledge base. Knowledge managers can define knowledge categories to pre-populate the list of available categories.

As a knowledge contributor, you can select categories using the Category picker, and add or edit categories if enabled for the knowledge base.



To select a category:

1. Click the reference lookup icon beside the **Category** field to open the Category picker.
2. Select an existing category, or click the add category icon (+) to add a new category.

After you select a category, you can click on the pen icon to rename that category. Press the enter key or click outside the selected category to save the change.

3. [Optional] Select or add a subcategory.
4. Click **OK**.



Note: Clicking **Cancel** while selecting a category closes the category picker without changing the category. If you made changes to the categories such as renaming or adding new categories, the last change is cancelled, previous changes are preserved.

Editing Articles

You can edit an existing article by clicking **Edit** when viewing that article. Edits to an article are automatically published when you save the article.

Retiring Articles

You can retire a published knowledge article. Retired knowledge articles are no longer available for users to view.

A knowledge article has an associated retirement workflow, similar to the publishing workflow. This allows administrators to configure these workflows, defining an approval and review process for retiring knowledge if appropriate.

When editing an article, click **Retire** to launch the retirement workflow associated with that article.

Creating Knowledge from Incidents and Problems

As an ITIL user, you can create a knowledge article when closing an incident or problem record.

To create knowledge from an incident or problem:

1. From the incident or problem record, select the **Knowledge** check box.
2. Close the incident or problem.

The short description from the incident or problem becomes the knowledge article title. Articles created this way are added to the knowledge base specified in the property `glide.knowman.task_kb`.

Depending on the value of the `glide.knowman.submission.workflow` property, knowledge created from an incident or problem may require additional approval. When this property is true, a submission record is created instead of a knowledge article. A user with the knowledge role can approve the submission to create a knowledge article.

Approving Submissions

If the `glide.knowman.submission.workflow` property is true, a user with the knowledge role must approve the submission before a knowledge article is created.

1. Navigate to **Knowledge > Open Submissions**.
2. Select a submission record.
3. Review the submission to ensure the content and settings are correct.
4. Click **Create Article**.

This creates a new draft knowledge article, which can be edited before publishing, such as to select a category.

References

- [1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/product/knowledge-management/task/t_CreateAKnowledgeArticle.html

Managing 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


Having multiple knowledge bases allows an organization to spread management responsibilities across multiple users, known as knowledge managers. As a knowledge manager, you can perform administrative actions within knowledge bases you manage.

You can assign other managers, define category structures, configure which users can read and contribute articles, move and pin articles, and modify most fields on the Knowledge Base form. You can also approve the publishing or retiring of knowledge articles in those knowledge bases.

The primary manager of a knowledge base is the *owner* of that knowledge base. Each knowledge base must have one owner. There may be any number of additional managers for each knowledge base. All managers of a knowledge base, including the owner, automatically receive the `knowledge_manager` role.

Assigning Knowledge Base Managers

You can assign users as managers of a knowledge base.

1. Navigate to **Knowledge > Knowledge Bases**.
2. Select a knowledge base you manage.
3. In the **Managers** field, click the unlock icon ().
4. Add one or more users.
5. Click **Update**.
 - After you save the knowledge base record, users selected as managers automatically receive the `knowledge_manager` role if they do not have it already.

You can remove a knowledge base manager by removing that user from the **Managers** field. If the user is not a manager of any other knowledge base, the `knowledge_manager` role is removed from that user.

Defining User Criteria

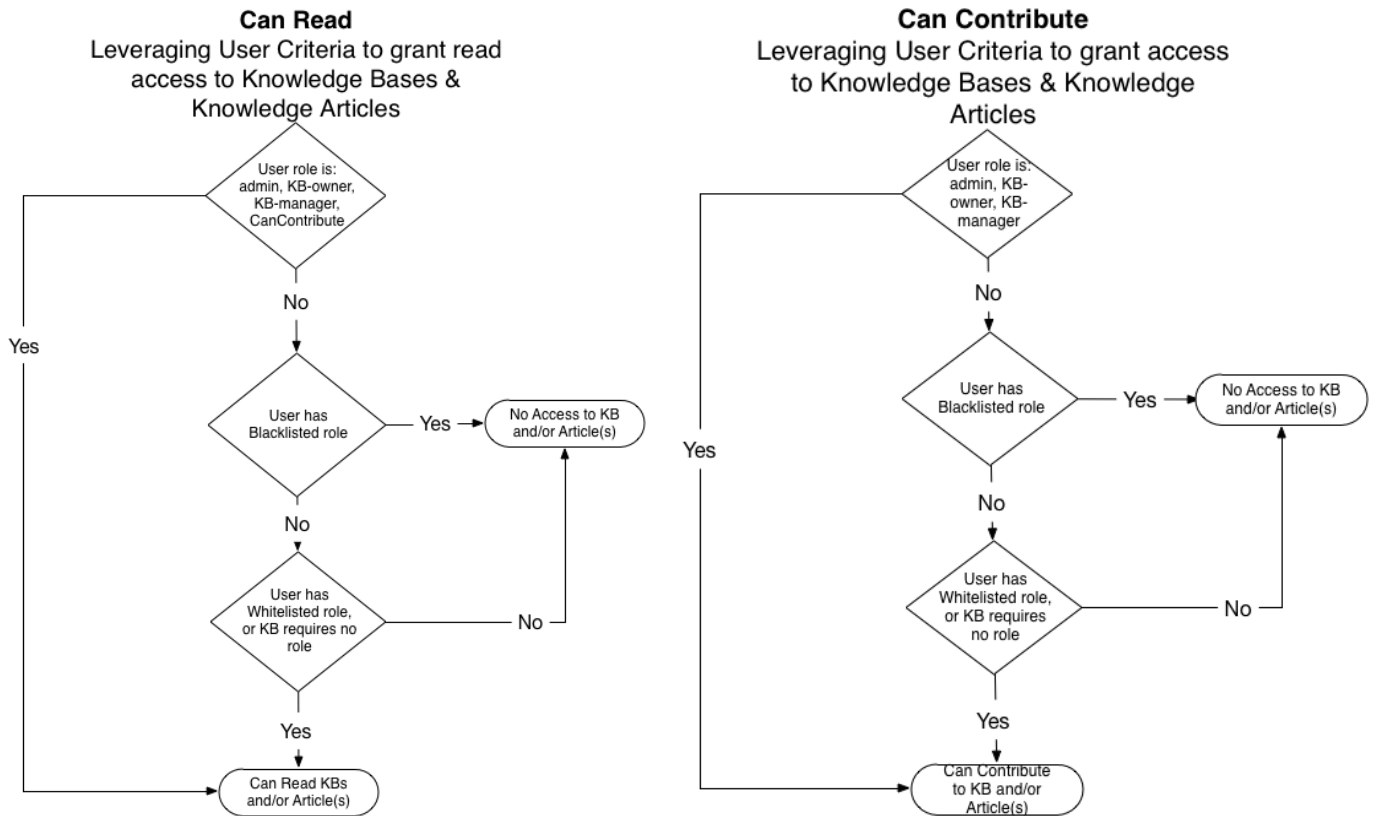
You can specify user criteria to control which users can create, read, write, and retire knowledge articles. Knowledge bases use these user criteria records to determine which sets of users can read or contribute knowledge within that knowledge base.

If a knowledge base has no user criteria selected, articles within that knowledge base are available to all users. Only users with at least one role can create and edit articles. Users without any role can read articles but cannot contribute. If a knowledge base has **Can read** user criteria defined, but no **Can contribute** user criteria, all users with at least one role can access and modify the knowledge base.

To specify which users can read and contribute to a knowledge base:

1. Navigate to **Knowledge > Knowledge Bases**.
 2. Select a knowledge base you manage.
 3. Select either the **Can read** or **Can contribute** related list.
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- **Can read:** users who meet one of these criteria can read articles in this knowledge base.
 - **Can contribute:** users who meet one of these criteria can create and edit articles in this knowledge base.
4. Select or create user criteria. For user criteria permission behavior, see the User Criteria Results Table.



Video Tutorial

The following video tutorial demonstrates how to create user criteria records and apply them to control user access to knowledge bases.

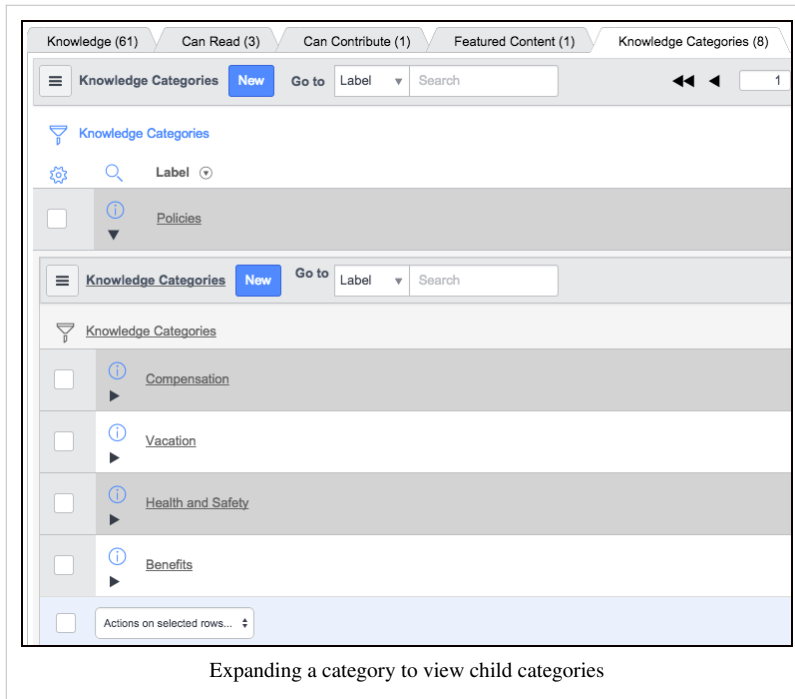
How to Control Knowledge Access through User Criteria

Defining Knowledge Categories

Each knowledge base has a hierarchy of categories that organizes the articles. A category can be a *top-level* category or a *child* category. The parent of a child category can be a top-level category or another child category. By making a category the child of another child category you can create a category structure with any number of levels.

You can create and edit categories separately for each knowledge base.

1. Navigate to **Knowledge > Knowledge Bases**.
2. Select a knowledge base you manage.
3. Do one of the following.
 - Create a top-level category by navigating to the **Knowledge Categories** related list and clicking **New**.
 - Create a child category by expanding an existing category and clicking **New** within the expanded section.
4. Enter a **Label** for the category. The label appears as the name of the category.
5. [Optional] Enter a **Value** you can use when referencing the category in scripts.
6. Click **Submit**.



In addition to using categories defined by a knowledge manager, knowledge contributors can add and edit categories when editing an article.

Moving Articles

You can move articles between knowledge bases. For example, you may want to move articles from the default knowledge base when migrating to knowledge management v3.

To move an article:

1. Edit the article.
2. Change the **Knowledge Base** field value.

After moving an article, the Apply Default Values dialog box prompts you to populate certain fields in the article with default values from the new knowledge base. If the new knowledge base has no default values, the dialog box does not appear.

3. If the new knowledge base has default values, click **OK** to overwrite fields with the default values, or **Cancel** to leave all fields unchanged.
4. Click **Update**.

You can define default values for articles in knowledge bases you manage using the **Set default knowledge field values** field on the Knowledge Base form.

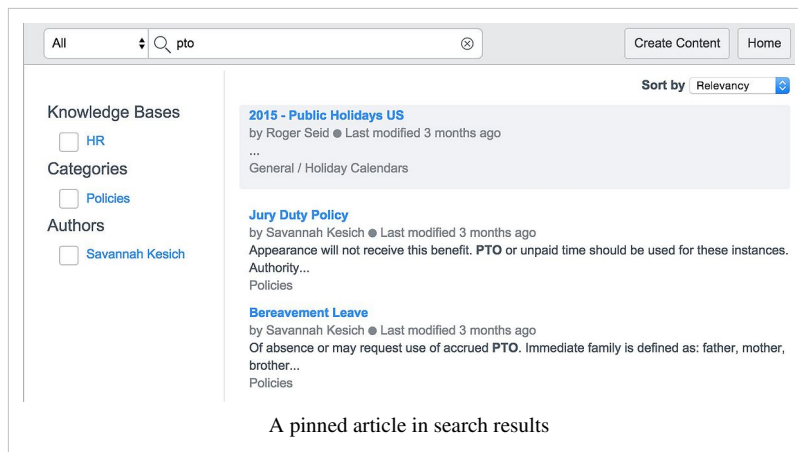
Pinning Articles

You can *pin* an article to appear at the top of knowledge search results and optionally in the **Featured content** section of the knowledge homepage.

Pinning associates an article to specific keywords. Searching for a keyword causes articles with that keyword to appear at the top of search results. You can pin articles that need to be distributed broadly, such as a maintenance notice or new HR policy. By default, only articles with the keyword *homepage* appear in the featured content section. An administrator can customize featured content to change this behavior.

To pin an article:

1. Navigate to **Knowledge > Knowledge Bases**.
2. Select a knowledge base.
3. In the **Featured content** related list, click **New**.
4. Select a **Knowledge** article.
5. Click the lock icon to expand the **Keywords** field.
6. Select or create knowledge keyword records using the reference lookup icon.
 - Each keyword must be a single term without spaces.
7. After adding all keywords, click **Submit**.



References

- [1] https://docs.servicenow.com/bundle/jakarta-service-management-for-the-enterprise/page/product/human-resources/concept/c_HRKnowledgeIst.html

Administering Knowledge



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

Overview

As an administrator, you are responsible for setting up knowledge bases, configuring knowledge workflows, and customizing knowledge homepages. Most day-to-day management functions are performed by knowledge managers.

Creating a Knowledge Base

You can create new knowledge bases by navigating to **Knowledge > Knowledge Bases** and clicking **New** (see table for field descriptions). Knowledge managers can modify the value of any field except the **Owner** field.

Field	Description
Title	The name of the knowledge base.
Icon	An image to associate with the knowledge base when listed in the homepage.
Disable commenting	A check box for preventing users from commenting on articles in the knowledge base. You can override this setting for specific articles using the Disable commenting check box on the Knowledge form.
Disable suggesting	A check box for preventing users from suggesting edits to articles in the knowledge base. You can override this setting for specific articles using the Disable suggesting check box on the Knowledge form.
Disable category editing	A check box for preventing contributors from creating and editing categories when selecting a category. When this check box is selected, only knowledge managers can define knowledge categories.
Owner	The user responsible for the knowledge base.
Managers	A list of knowledge base managers.
Publish workflow	The publishing workflow for articles within the knowledge base.

Retire workflow	The retiring workflow for articles within the knowledge base.
Active	A check box that indicates if the knowledge base is active.
Description	A text description of the knowledge base.
Set default knowledge field values	Default values for knowledge articles in this publication. To define a default value, select a field in the left column, then use the right column to enter the data to automatically populate the selected field. Knowledge contributors can choose to apply default field values when selecting a knowledge base for an article.



Note: You cannot set a default value for the **Author** field.

Configuring Knowledge Workflows

The publishing and retirement processes for a knowledge article are controlled by workflows defined for the knowledge base that the article belongs to. You can assign different workflows to each knowledge base.

You can use one of the default workflows, or create your own workflows to define custom publishing and retirement processes for different types of knowledge.

Default Workflows

The following default workflows are provided. Use one of these workflows, or copy these to create your own workflows.

Workflow	Description
Knowledge - Approval Publish	Requests approval from a manager of the knowledge base before moving the article to the published state. The workflow is canceled and the article remains in the draft state if any manager rejects the request.
Knowledge - Approval Retire	Requests approval from a manager of the knowledge base before moving the article to the retired state. The workflow is canceled and the article remains in the published state if any manager rejects the request.
Knowledge - Instant Publish	Immediately publishes a draft article without requiring an approval.
Knowledge - Instant Retire	Immediately retires a published article without requiring an approval.
Knowledge - Publish Knowledge	A subflow that moves the knowledge article to the published state. You can use this subflow when defining your own workflow.
Knowledge - Retire Knowledge	A subflow that moves the knowledge article to the retired state. You can use this subflow when defining your own workflow.

For the workflows that require approval, you can configure which users can approve or reject by editing the `getApprovers()` function in the KBWorkflow script include.

Customizing Featured Content


The knowledge homepage (**Self-Service > Knowledge**) displays featured, also called *pinned*, content. You can set properties to modify certain aspects of the **Featured content** section of the knowledge homepage.

- Set the title using the `glide.knowman.default_pinned_section_header_title` property.
- Set the default keyword that determines which articles appear using the `glide.knowman.default_keyword` property.

References

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

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. (<code>glide.knowman.columns</code>)	Set the number of columns for arranging topics on the knowledge portal.
Maximum number of articles per content block on the home page. (<code>glide.knowman.content_block_limit</code>)	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. (<code>glide.knowman.show_only_populated</code>)	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 designate 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. (<code>glide.knowman.recent_tasks.display</code>)	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 <i>attach to task</i> button after searching from a form.
Number of attached tasks to display when viewing an article. (<code>glide.knowman.recent_tasks</code>)	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. (<code>glide.knowman.show_rating_options</code>)	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. (<code>glide.knowman.show_rating_options.roles</code>)	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. (<code>glide.knowman.show_yn_rating</code>)	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. (<code>glide.knowman.show_yn_rating.roles</code>)	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. (<code>glide.knowman.create_incident_link.display</code>)	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. (<code>glide.knowman.create_incident_link</code>)	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. (<code>glide.knowman.show_star_rating</code>)	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`)

Show "Flag Article" option to identify incomplete/inaccurate articles.
(`glide.knowman.show_flag`)

List of roles (comma separated) that can flag incomplete/inaccurate articles.
(`glide.knowman.show_flag.roles`)

Show user comments on knowledge articles.
(`glide.knowman.show_user_feedback`)

List of roles (comma separated) that can create and view user comments on an article.
(`glide.knowman.show_user_feedback.roles`)

Maximum number of user comments displayed on a knowledge article.
(`glide.knowman.feedback.display_threshold`)

Use Live Feed for Knowledge feedback.
(`glide.knowman.use_live_feed`)

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.

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.

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.

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**.

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.

Set a maximum number of user comments to display. This property applies only to the legacy Knowledge article view.

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. (<code>glide.knowman.order.search</code>)	Select the order for displaying search results on the knowledge homepage. <ul style="list-style-type: none"> 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. (<code>glide.knowman.search.operator</code>)	Select the search approach to use when the search term includes multiple words. <ul style="list-style-type: none"> 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. (<code>glide.knowman.search.show_author</code>)	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. (<code>glide.knowman.search.show_last_modified</code>)	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`)

Show category in knowledge search results.
(`glide.knowman.search.show_category`)

Show number of views in knowledge search results.
(`glide.knowman.search.show_view_count`)

Show relevancy in knowledge search results.
(`glide.knowman.search.show_relevancy`)

Enable instant search results for knowledge.
(`glide.knowman.search.instant_results`)

Show article number in knowledge search results.
(`glide.knowman.search.show_article_number`)

Select this check box to include the date each article was published in knowledge search results.

Select this check box to include category breadcrumbs in knowledge search results.

Select this check box to include the number of times each article was viewed in knowledge search results.

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.

Select this check box to enable instant search for search results. The default is No.

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. (<code>glide.knowman.default_keyword</code>)	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. (<code>glide.knowman.default_pinned_section_header_title</code>)	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. (<code>glide.knowman.attach.fields</code>)	<p>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.</p> <p>For more information, see customizing the <i>attach to task</i> button. The contextual search feature replaces this behavior when contextual search is enabled for a task form.</p>

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

Migrating to Knowledge Management v3



Note: This article applies to Fuji and earlier releases. For more current information, see Knowledge Management v3 Migration^[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

Knowledge management is significantly changed with knowledge v3, which is enabled by default for all instances starting with the Fuji release. Knowledge v3 has several key differences from the version of knowledge management available with the Eureka release, knowledge v2.

When upgrading from Eureka or earlier, you must migrate legacy knowledge content and any customizations you have made in the Knowledge Base application in order to use the full range of new functionality.

Video Tutorial

The following video tutorial provides an overview of Knowledge Management version 3, first available in Fuji. Demonstrates how to set knowledge management properties, create a knowledge base, create categories, and control user access via user criteria.

Getting Started with Knowledge Management v3

Key Differences

These key differences exist between the legacy and v3 knowledge management functionality.

Legacy Knowledge	Knowledge v3
One knowledge base.	Multiple knowledge bases.
A single publishing workflow shared by all articles.	Separate, customizable workflows available for each knowledge base.
Two-level organizational structure with Topic and Category . A single organizational taxonomy shared by all articles.	Category structure with any number of levels. Each knowledge base has a unique category taxonomy.
Permissions defined per article using roles and ACLs.	Permissions defined per knowledge base using user criteria.

Migration Process

When you upgrade from Eureka or earlier, consider a multi-step migration process. This process ensures you can access existing knowledge content and allows you to fully migrate at your own pace.

Review automatic changes before upgrading. These changes are applied immediately when upgrading and may impact existing functionality.

Migrate Knowledge

1. Migrate knowledge functionality to use your customized functionality with the knowledge v3 enhancements.
2. Migrate knowledge content to use the knowledge v3 enhancements with your existing knowledge articles.

After You Migrate

- If you have not upgraded to Fuji Patch 10, you must create a category structure in the destination knowledge bases for existing articles. Since knowledge v3 supports multiple knowledge bases, Topic and Category fields are deprecated and searching is only supported on the new Category and Subcategory fields. For usability and display purposes, we recommend limiting your category levels to five deep (or fewer).
- If you have not upgraded to Fuji Patch 10 and the Knowledge article form was customized in knowledge v2, you must open the article form and add the Knowledge Base field to allow creation of new articles. The Knowledge Base field is mandatory in knowledge v3.
- You must configure knowledge access controls based on user criteria to ensure that users can access existing knowledge content. Since access control in knowledge v3 is intended to be based on user criteria alone, users may be unable to access v2 or v3 knowledge articles, or have restricted access, with preexisting ACLs.
- If the home page was customized in knowledge v2, custom layout and links are not saved in knowledge v3.

Automatic Changes

Upgrading to Knowledge v3 automatically changes knowledge functionality including the knowledge user interface and security model.



Note: Review these changes carefully to understand the impact of upgrading to Knowledge v3.

Default Knowledge Base

When you upgrade from Eureka or earlier, a default knowledge base is created, titled Knowledge, that contains all knowledge articles from the previous version. After the upgrade, you can add and edit articles in this knowledge base.

Any customizations you made to knowledge functionality before the upgrade are preserved in the default knowledge base. Legacy functionality, such as role-based access controls, is automatically changed when you upgrade. Review the automatic changes and migrate knowledge access controls as needed to preserve your existing user experience.

Security

Knowledge v3 manages access to articles with user criteria rather than roles and ACLs. Existing ACLs on the Knowledge [kb_knowledge] table are preserved, but with the following changes.

The conditions on existing ACLs are updated to check for the Knowledge Base Release version.

- A version of **3** indicates that a knowledge base uses the knowledge v3 functionality.
- A version of **2** indicates that a knowledge base uses legacy functionality.

New ACLs introduced by knowledge v3, such as field-level controls, apply to all knowledge bases.

When you upgrade from Eureka or earlier, any custom ACLs you implemented for the Knowledge table still apply to any knowledge records in the default knowledge base. Knowledge v3 updates ACLs that exist before upgrade so they only apply to Knowledge [kb_knowledge] records where this field value is **2**.



Note: These changes affect the default knowledge base. Even if you are not using the new knowledge functionality, the legacy knowledge behavior may change if you have made customizations to ACLs on the Knowledge [kb_knowledge] table. Ensure you configure knowledge access controls after upgrading to prevent unexpected behavior.

Because Knowledge v3 introduces ACLs for the Knowledge [kb_knowledge] table, if you do not have high security enabled, you may notice differences in default behavior. See KB0549970 ^[2] for information about configuring Knowledge v3 without high security.

Knowledge Article View

The Knowledge application uses the **kb_view** UI page to display knowledge articles.

The following changes apply automatically when you upgrade from Eureka or earlier:

- The existing **kb_view** page is renamed to **kb_view_customer**. The kb_view_customer page is used to display articles in the default knowledge base, preserving the legacy user experience.
- A new **kb_view** page is used. This becomes the primary page used to display articles that are not in the default knowledge base.

You should review all customizations introduced around the legacy **kb_view** UI page.

- URLs should not be updated as the new **kb_view** page redirects to the correct page depending on the article.

- Customizations made to the **kb_view** UI page are automatically copied to the **kb_view_customer** page on upgrade.
- Other customizations that affect **kb_view** may need to be copied or modified to apply to **kb_view_customer**. For example, an ACL defined for **kb_view** may need to be duplicated to provide security coverage for **kb_view_customer**.

Knowledge Portal

The legacy knowledge portal, **kb_home**, is preserved in knowledge v3. You can search articles from the knowledge portal and filter search results by knowledge base, and by language if the instance uses knowledge management internationalization. This portal also appears for users on older browsers, such as Internet Explorer 9, instead of the knowledge homepage.

You can add Navigation add-ons to the legacy knowledge portal. Navigation add-ons of the **Link** type appear in the **kb_header_links** UI macro. You can add this macro to the **kb_home** UI page to display these links in the top-right of the knowledge portal. To add navigation add-ons of the **Search** type, you must implement this functionality yourself in scripts on the **kb_home** UI page and associated UI macros.



Note: The search bar on the **kb_home** UI page is defined in the **kb_advanced_search** UI macro.

Search Functionality

By default, the legacy knowledge portal uses knowledge v3 search with limited filtering options. You can filter results only by knowledge base. Search results include only those articles the current user can view based on user criteria. ACLs do not restrict search results.

Feedback

Legacy feedback functionality is retained for knowledge articles displayed in the legacy article view. Users can continue to use the feedback options to view, add, and reply to comments on these legacy articles.

Legacy comments are retained in the Knowledge Feedback [kb_feedback] table.

To retain the legacy comment functionality with new knowledge articles for all users, set the **Use Live Feed for Knowledge feedback** property (`glide.knowman.use_live_feed`) to **false**. This property is true by default.



Note: Legacy feedback functionality is always used when viewing a public article as a guest user. Live feed comments are not available to guest users.

Modules

When you upgrade from Eureka or earlier, the **Knowledge Management** application menu is renamed to **Knowledge**. Legacy modules remain available; knowledge v3 modules are not activated automatically.

Knowledge Submissions

Knowledge submissions created from tasks continue to work in knowledge v3 with minor changes. See creating knowledge from incidents and problems for instructions on using knowledge submission in knowledge v3.

By default, the **Topic** and **Category** fields no longer appear on the Submission form due to the knowledge v3 category changes.

The property `glide.knowman.submission.workflow` no longer appears on the knowledge properties UI page. To enable knowledge submissions, set this property to **true** on the System Properties [sys_properties] table.

Migrating Knowledge Access Controls



Warning: If you do not migrate existing knowledge ACLs to user criteria, users may be unable to access knowledge articles, or may be able to access restricted articles.

Access to knowledge articles is controlled based on the user criteria for the specific knowledge base. User criteria records, rather than ACLs, control basic create, read, update, and delete operations for knowledge articles as well as which search results appear. This may lead to unexpected behavior if your configuration depends on ACLs to control access.

To ensure users are able to access the correct knowledge articles, migrate any ACL-based security settings to user criteria. This process may include creating additional knowledge bases and moving existing content to these knowledge bases, depending on your security model. For a detailed explanation and migration examples, refer to KB0550924 Understanding User Criteria and ACLs in Knowledge v3 ^[3].

Migrating Knowledge Functionality

Replace Modules

When you upgrade from Eureka or earlier, no changes are made to the knowledge management modules. When you are ready to migrate to knowledge v3, you can activate the v3 modules and deactivate the legacy modules.

Use the tables below to identify which knowledge v3 modules to activate and which legacy modules to deactivate. When activating a knowledge v3 module, deactivate the knowledge v2 module with the same name to ensure users access the correct module.

You can use the `enablev3anddisablev2menus` backup script to enable knowledge v3 menus and disable knowledge v2 menus.

Knowledge v3 Modules

Legacy Modules

Title	Order	Link type	Title	Order	Link type
Homepage	100	URL (from Arguments:)	Create New	100	New Record
Articles	200	Separator	Published	190	List of Records
Create New	300	New Record	Edit	200	List of Records
Unpublished	400	List of Records	Retired	240	List of Records
Published	500	List of Records	Feedback	300	List of Records
Retired	600	List of Records	View	400	URL (from Arguments:)
Flagged	800	List of Records	Submissions	410	Separator
All	900	List of Records	Assigned to me	420	List of Records
Open Submissions	960	List of Records	Open Submissions	450	List of Records
Administration	1000	Separator	KCS	460	Separator
Knowledge Bases	1100	List of Records	Flagged Articles	470	List of Records
Feedback	1300	List of Records	Ratings	480	List of Records
Ratings	1500	List of Records	Search Log	495	List of Records
Search Log	1600	List of Records	Overview	496	URL (from Arguments:)
Navigation Add-ons	1700	List of Records	Administration	500	Separator
Messages	1800	List of Records	Navigation Add-ons	600	List of Records
Properties	1900	URL (from Arguments:)	Properties	700	URL (from Arguments:)
Overview	2000	URL (from Arguments:)	Messages	800	List of Records
User Criteria	2100	List of Records			

Create Publish and Retire Workflows

In the legacy knowledge base, article state was controlled by UI actions. With Knowledge v3, article state is controlled by workflows. UI actions from previous versions are available only in the default knowledge base.

To preserve your article publishing and retirement process in new knowledge bases, create workflows that follow these processes. To create these workflows, copy the default workflow that best matches your process and modify that copy. After creating workflows that use your article publishing and retirement processes, use these workflows as the **Publish workflow** and **Retire workflow** for the new knowledge bases.

Define a Category Structure

With knowledge v3, all knowledge articles are organized by category and subcategory within knowledge bases.

The default knowledge base uses the legacy category structure; knowledge articles are organized by topics and categories.

Before you migrate articles, create a category structure for these articles in the destination knowledge bases. This structure can reproduce your legacy topic and category structure or can be extended to take advantage of the knowledge v3 category functionality.

Migrating Knowledge Content

When you upgrade from Eureka or earlier, any legacy knowledge articles are stored in the default knowledge base. To use the new functionality available in knowledge v3 with these articles, you must migrate these articles out of the default knowledge base.

1. Move articles out of the default knowledge base by changing the knowledge base for the article.

The state of migrated articles is unchanged.

2. Assign categories to these articles using the category structure you defined.

After you migrate a knowledge article, the legacy feedback functionality is automatically replaced with the new knowledge feedback mechanisms. Legacy feedback is copied to the Live Feed Message [live_message] table to ensure previously submitted feedback is available for knowledge v3 articles.

References

- [1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/product/knowledge-management/concept/c_KMv3Migration.html
 - [2] https://hi.service-now.com/kb_view.do?sysparm_article=KB0549970
 - [3] https://hi.service-now.com/kb_view.do?sysparm_article=KB0550924
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