Interactive Work Instructions

Knowledge Management

Introduction

This interactive guide provides step-by-step instructions for completing ServiceNow workflows based on your role. Designed to cater to all learning personas, it allows you to navigate via click-activated links for quick access to task instructions.

Instructions

1. Find your knowledge role in the table below.
2. Click the icon to view the workflow you need to complete in ServiceNow.
3. Use the ‘Return to Menu’ hyperlinks at the end of each instruction set to navigate back to the main page.

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

Identify your role and view your ServiceNow task instructions

- **Find your knowledge role** in the table below
- **Click the icon** to view the workflow you need to complete in **ServiceNow**

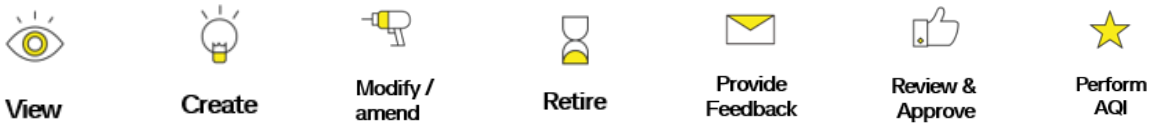
Knowledge Authors create and modify knowledge assets or retire assets they create.



Knowledge Owners are mapped to specific Service Offering(s). Knowledge Owners view and approve knowledge assets to validate technical accuracy.



Knowledge Managers are members of the Knowledge Management Team. Knowledge Managers manage knowledge bases, templates and taxonomies. They review and approve knowledge assets to validate quality assurance.

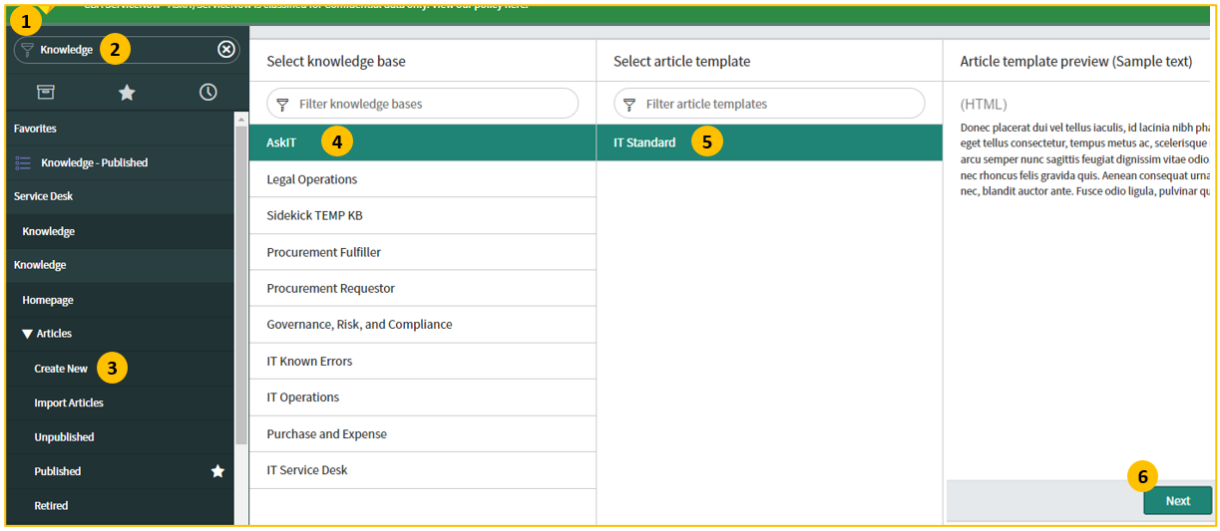


Knowledge Users view and use knowledge assets and provide feedback on quality and usefulness.

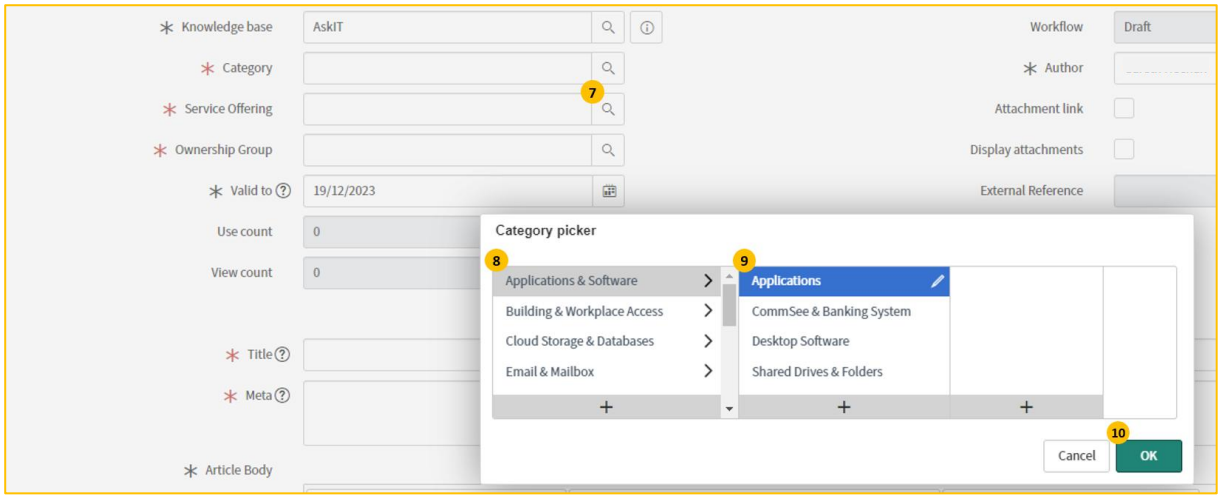


This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When creating a knowledge article, follow these process steps

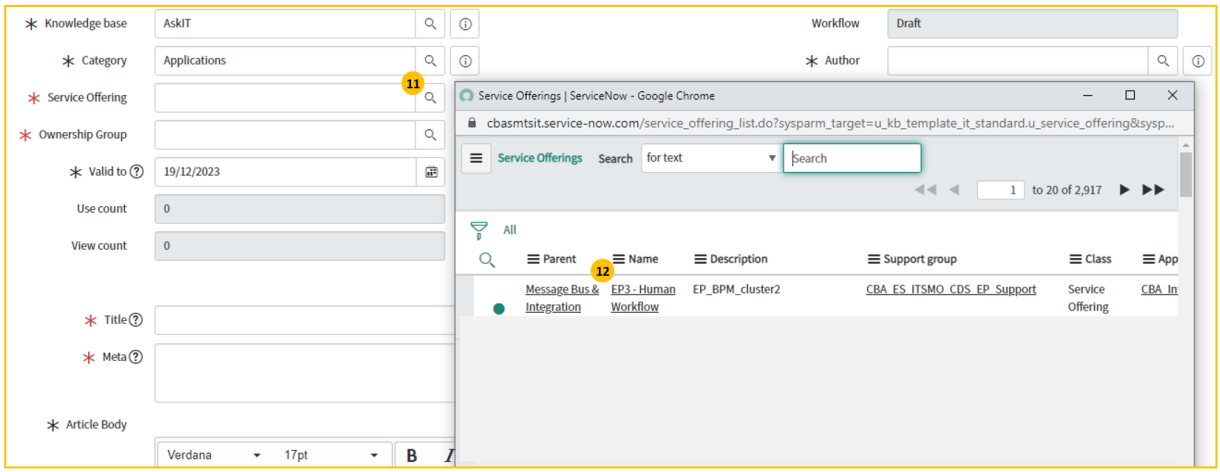


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **Create New** from the Articles dropdown
4. Select a **Knowledge Base** from the options
5. Select an **Article Template** from the options
6. Click the **Next** button

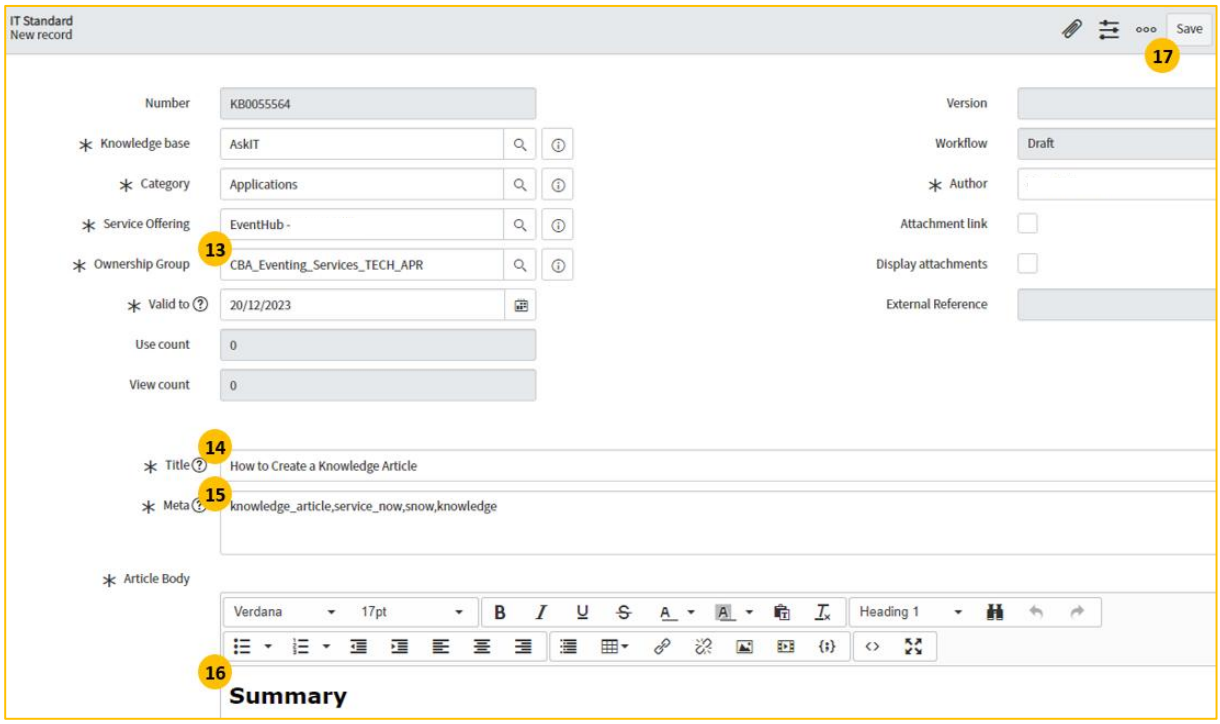


7. Select the **Category lookup** icon
8. Select a **Category**
9. Select a **Service Offering Title** from the options
10. Click the **OK** button

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

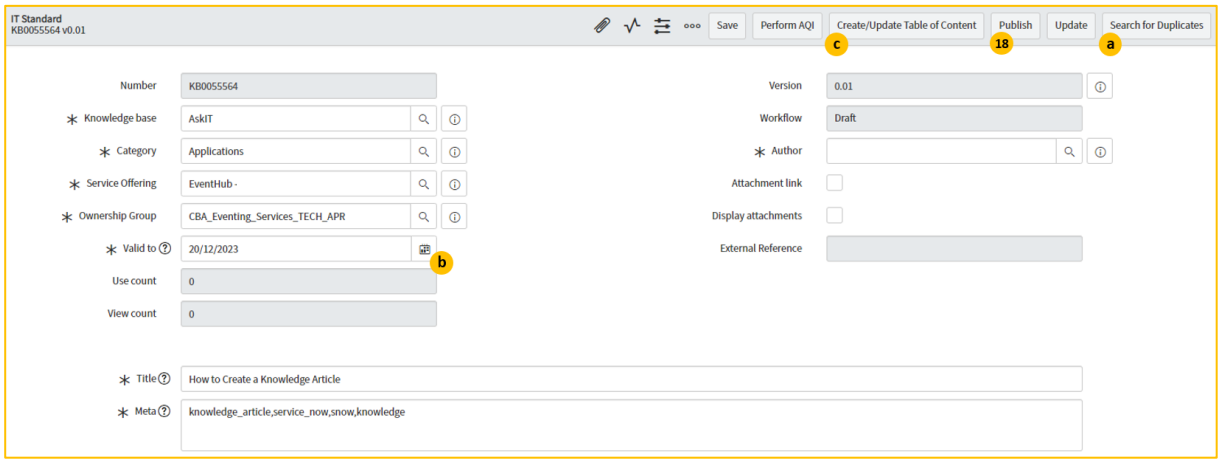


11. Select the **Service Offering Lookup** icon
12. Select a **Service Offering hyperlink** from the options



13. View the **Ownership Group** field which has auto populated from the Service Offering selection
14. Select the **Title** field and enter a title for the knowledge article.
15. Select the **Meta** field and enter Meta keywords.
16. Select the **Article Body** field and enter knowledge information under the prescribed headings.
17. Click the **Save** button

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.



18. Click the **Publish** button

Optional, additional steps to perform before publishing the new article:

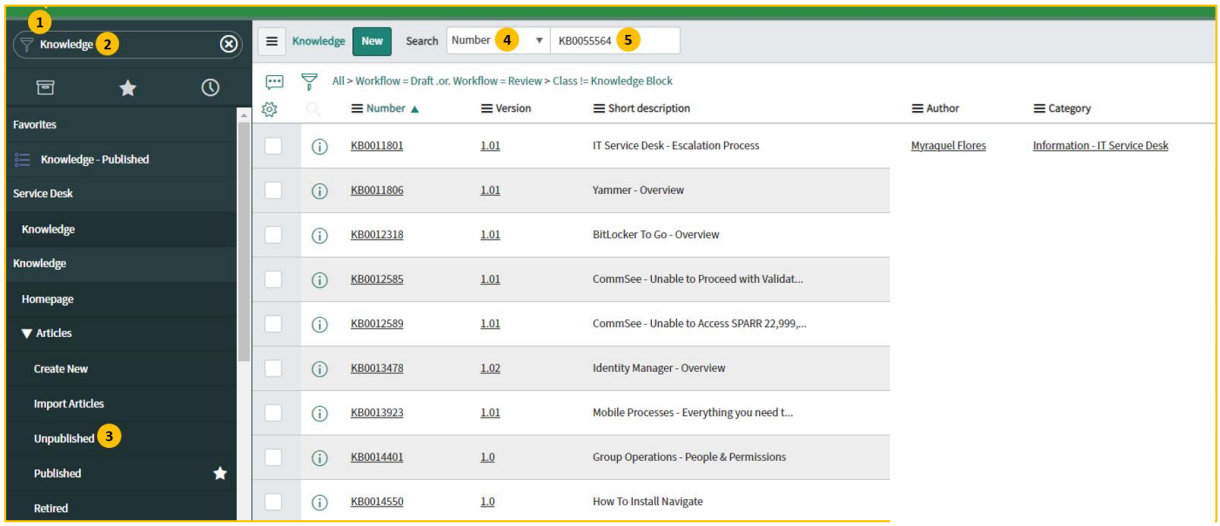
a. Click the **Search for Duplicates** button – this allows you to search for similar knowledge articles in the Knowledge Base. Search results return knowledge article with similar titles and Meta keywords.
b. Select the **Valid to Calendar** icon – this allows you to amend the validity to a date within 12 months of the current date.
c. Click the **Create/Update Table of Content** button – this adds a table of content to the article detailing the headings of the knowledge article body.

Click the **Save** button again after performing any of steps a to c, and then click the **Publish** button.

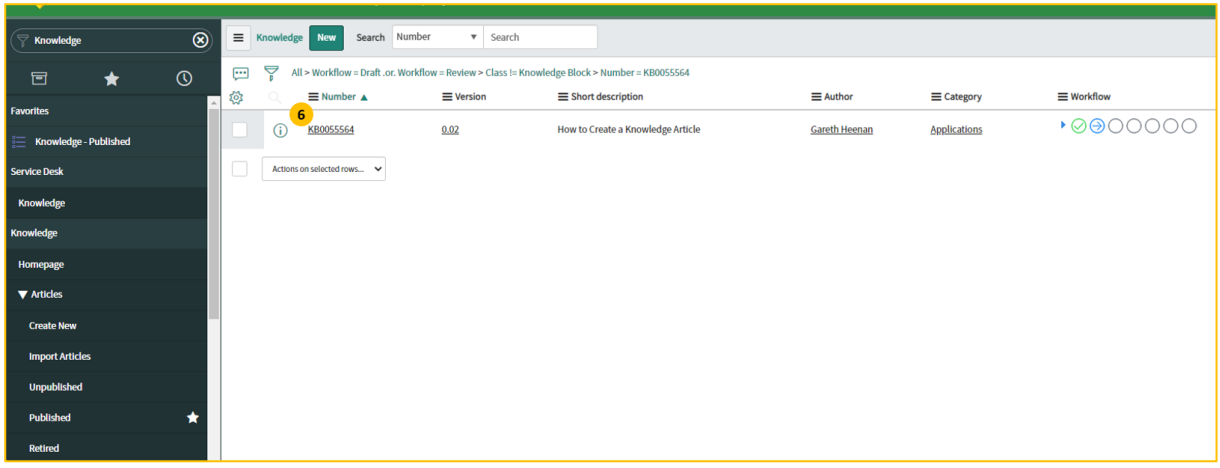
[Click here to return to the Work Instructions roles, workflows and processes homepage]

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When reviewing a knowledge article, follow these process steps

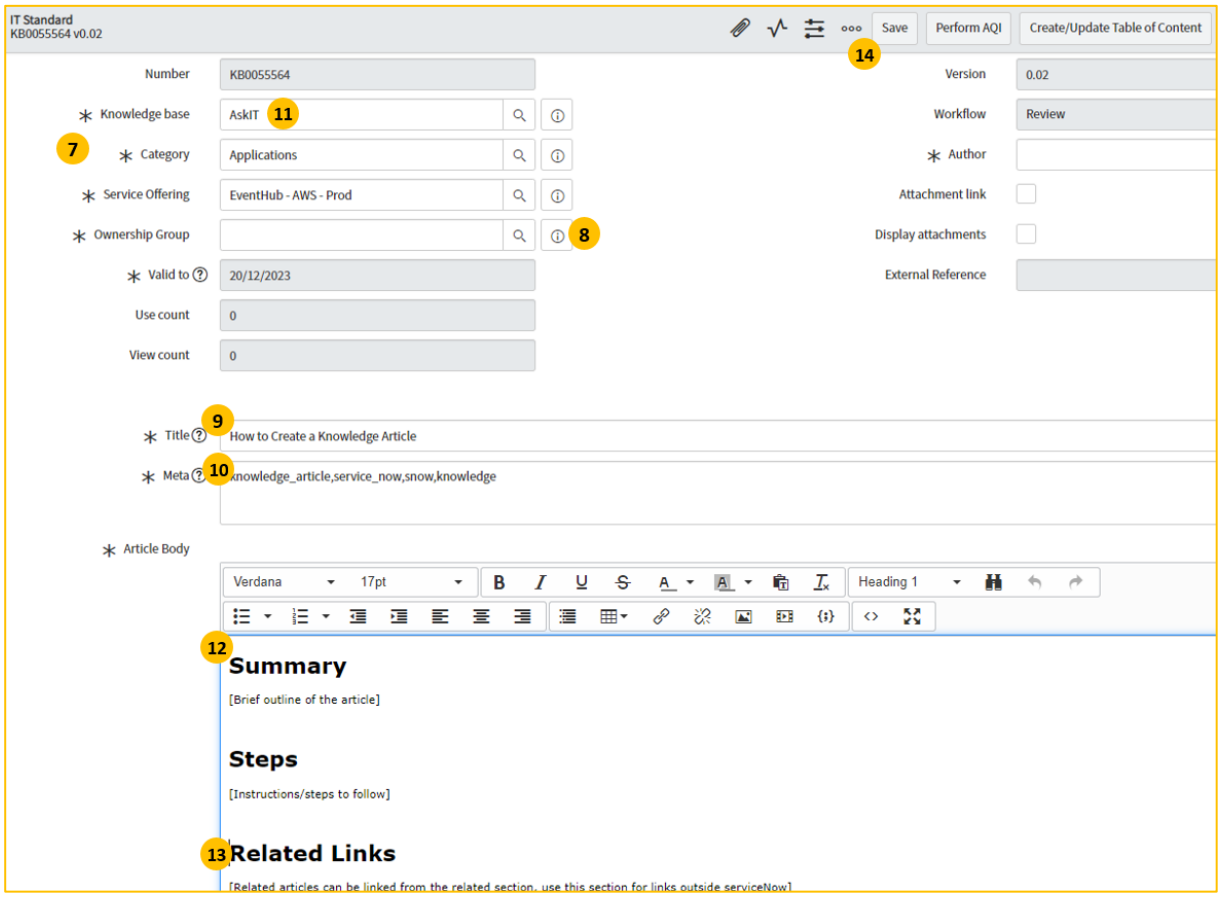


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **Unpublished** from the Articles dropdown
4. Select **Number** from the Search options
5. Enter **knowledge article number** in the search field and press **Enter**



6. Select **Knowledge Article number** hyperlink

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

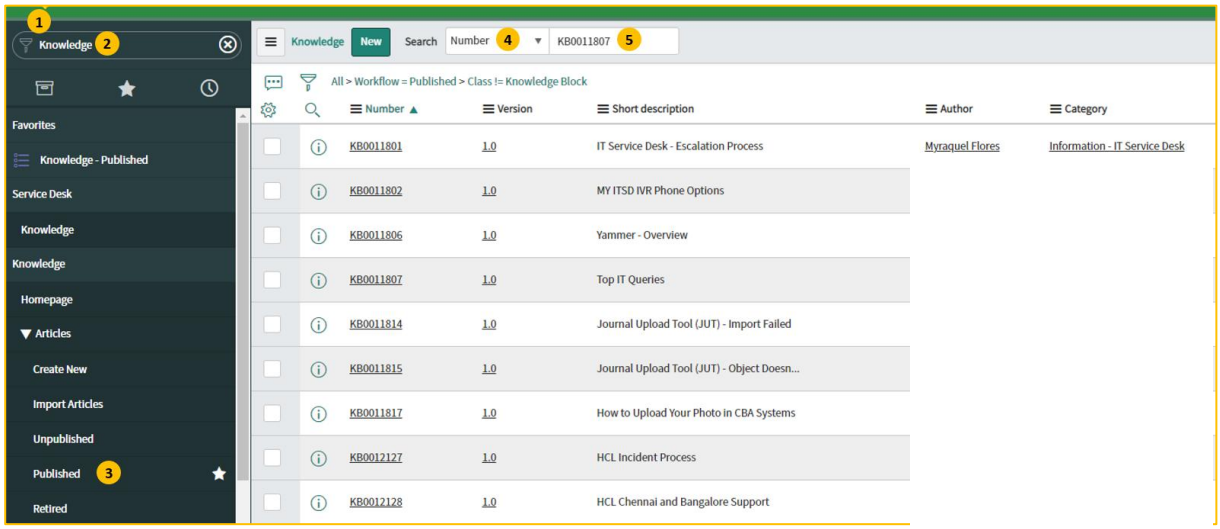


7. Review all **mandatory** fields – those marked with an asterisk
8. Ownership Group auto-populates based on Service Offering. Use the **(i) information** icon for Service Offering, Ownership Group and Author
9. Review **Title**
10. Check **Meta**
11. Check the **knowledge base** selection.
12. Check the **Article Body** to validate the content structure and accuracy
13. Check **Hyperlinks**
14. Click **Save** button If any changes were made during review

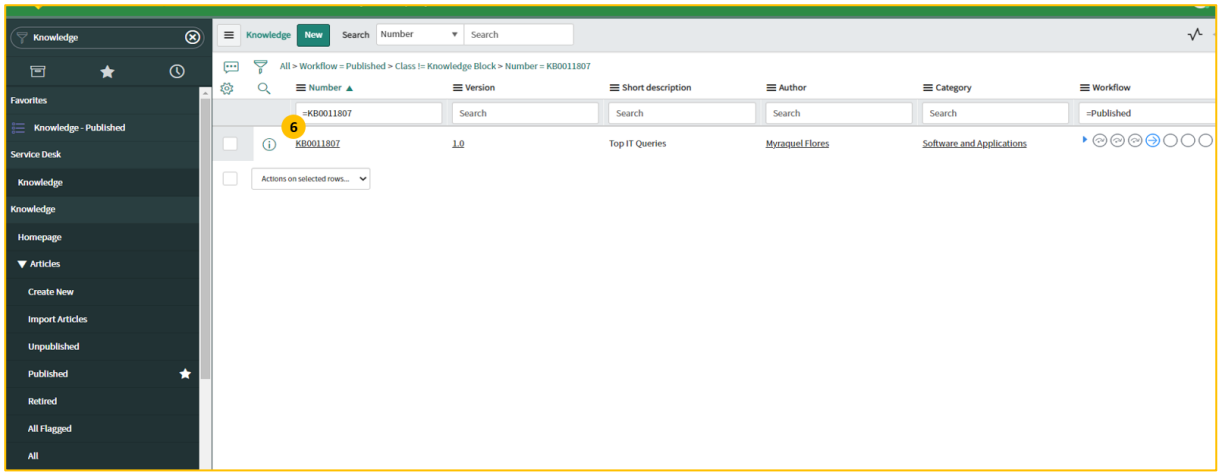
Click here to return to the Work Instructions roles, workflows and processes homepage

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When amending a knowledge article, follow these process steps

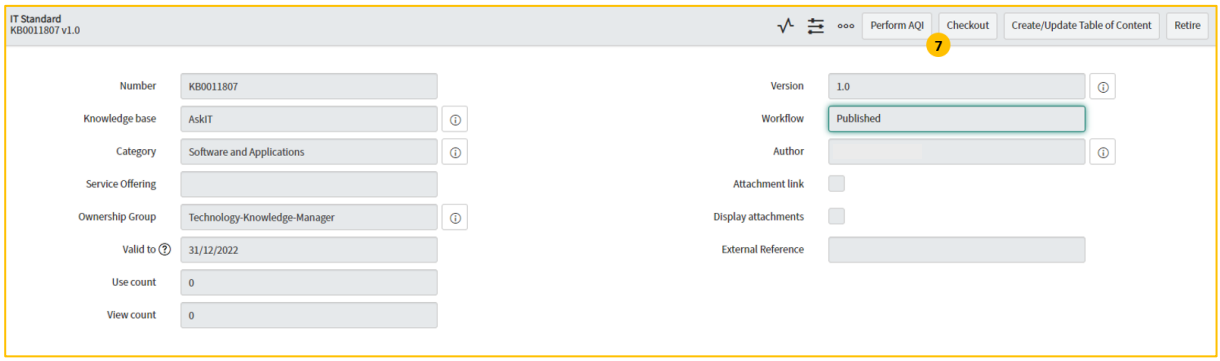


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **Unpublished** from the Articles dropdown
4. Select **Number** from the Search options
5. Enter **knowledge article number** in the search field and press **Enter**

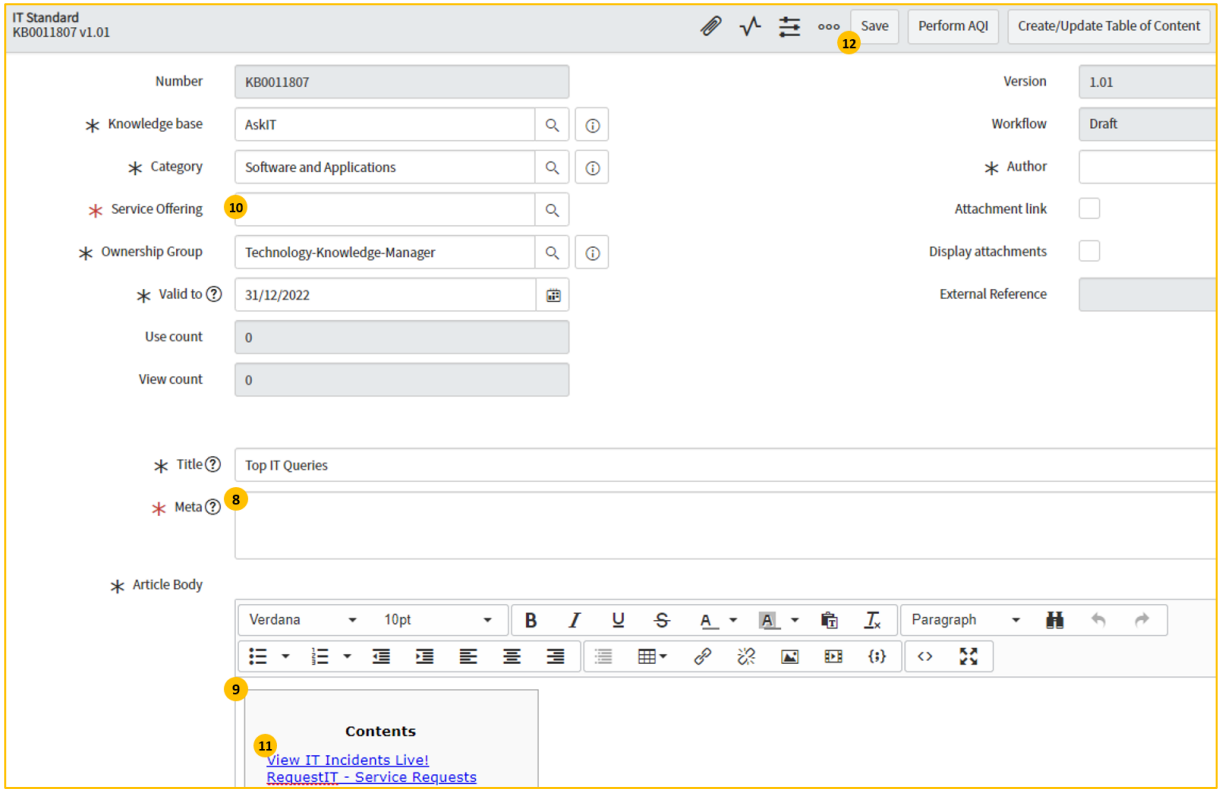


6. Select **Knowledge Article number** hyperlink

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

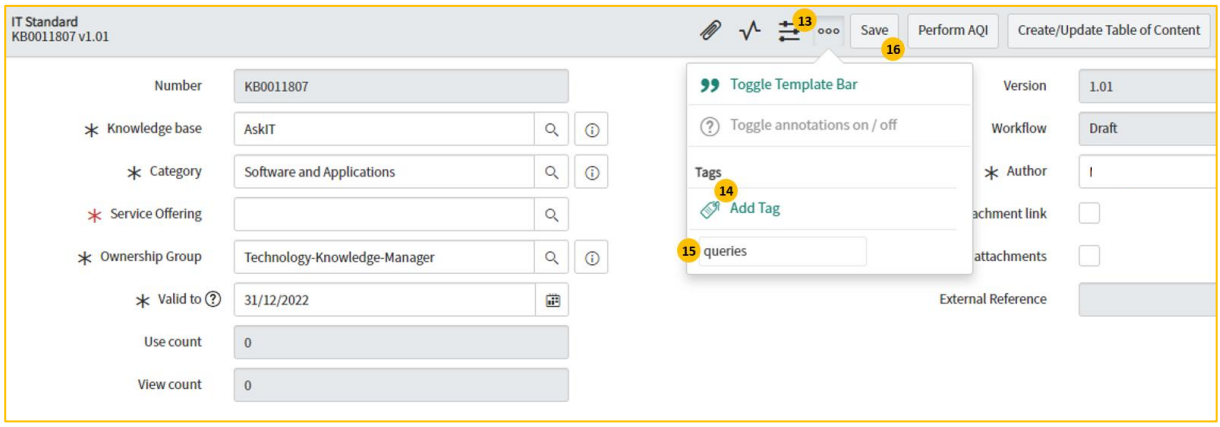


7. Click **Checkout** button



8. Select **Meta** text field and Enter Meta keywords
9. Select the **Article Body** text field and review the content accuracy and structure
   View the steps required for reviewing knowledge articles
10. Enter any additional **information** required in any of the **red asterisk mandatory fields**
11. Check, edit and include **hyperlinks** if required
12. Click the **Save** button

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.



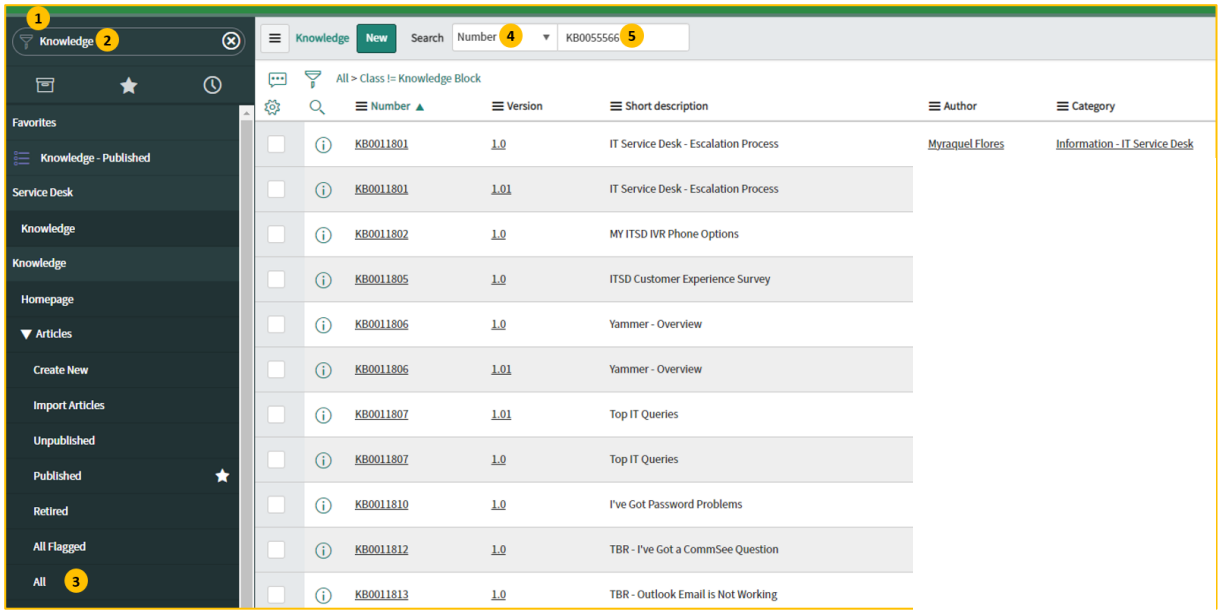
Adding Tags is optional

13. Click the **3 dots** button
14. Select Add Tag hyperlink
15. Enter **Tag text** in the text field and press Enter key
16. Click the **Save** button again

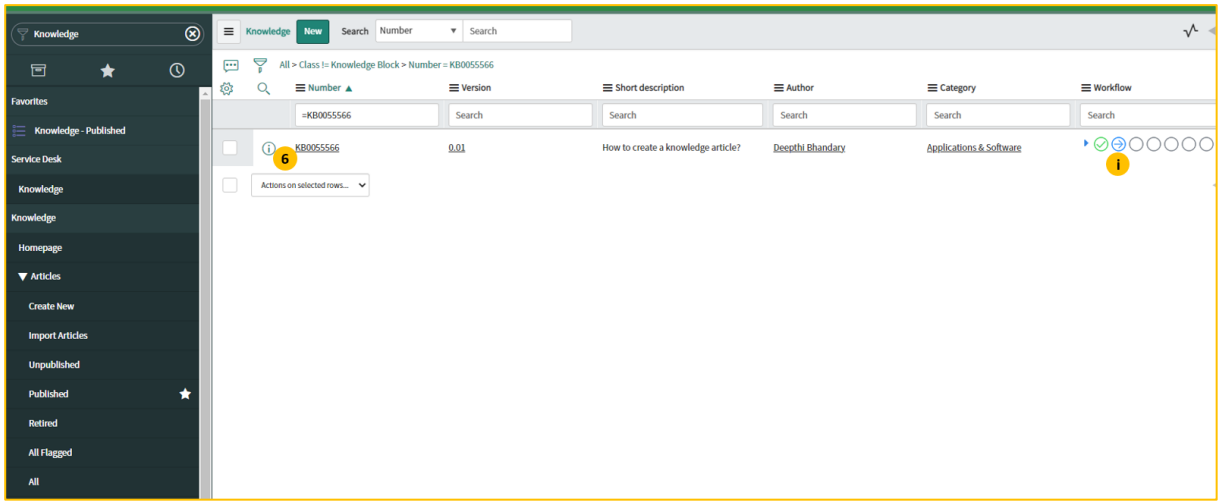
Click here to return to the Work Instructions roles, workflows and processes homepage

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When publishing a knowledge article, follow these process steps

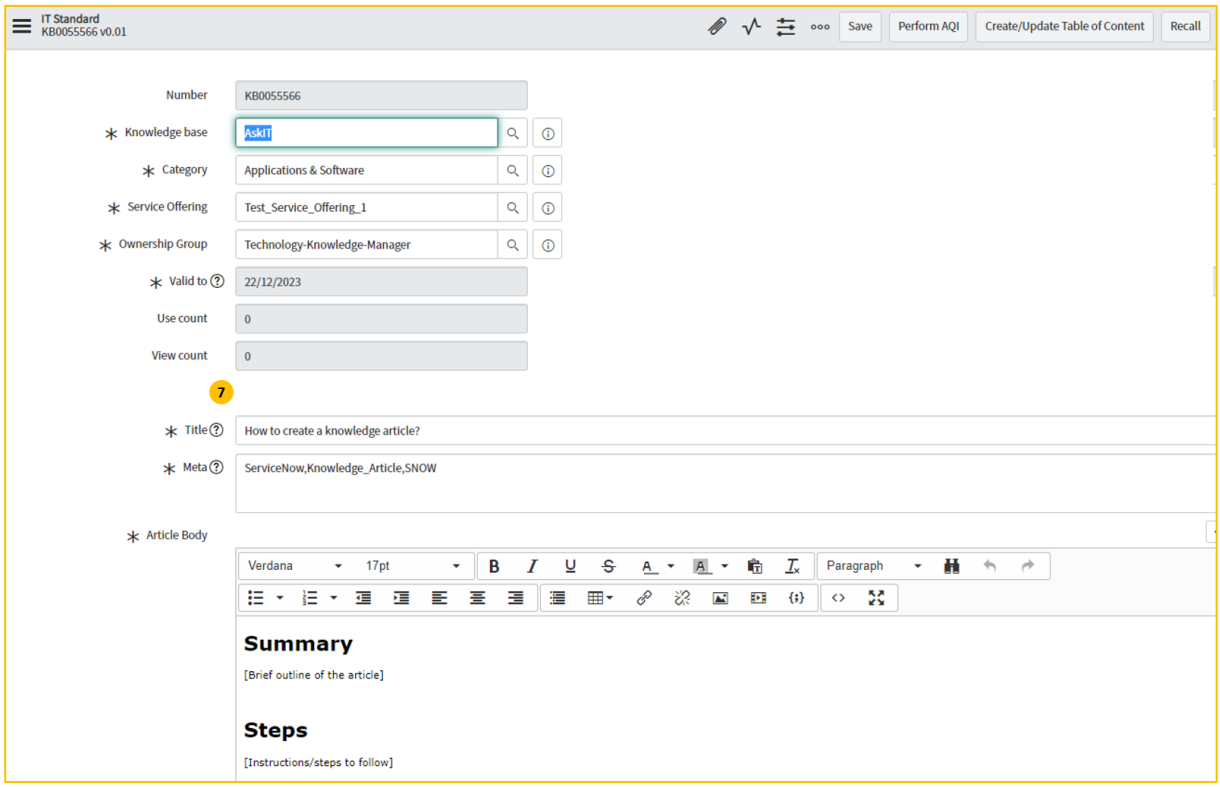


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **All** from the Articles dropdown
4. Select **Number** from the Search options
5. Enter **knowledge article number** in the search field and press **Enter**

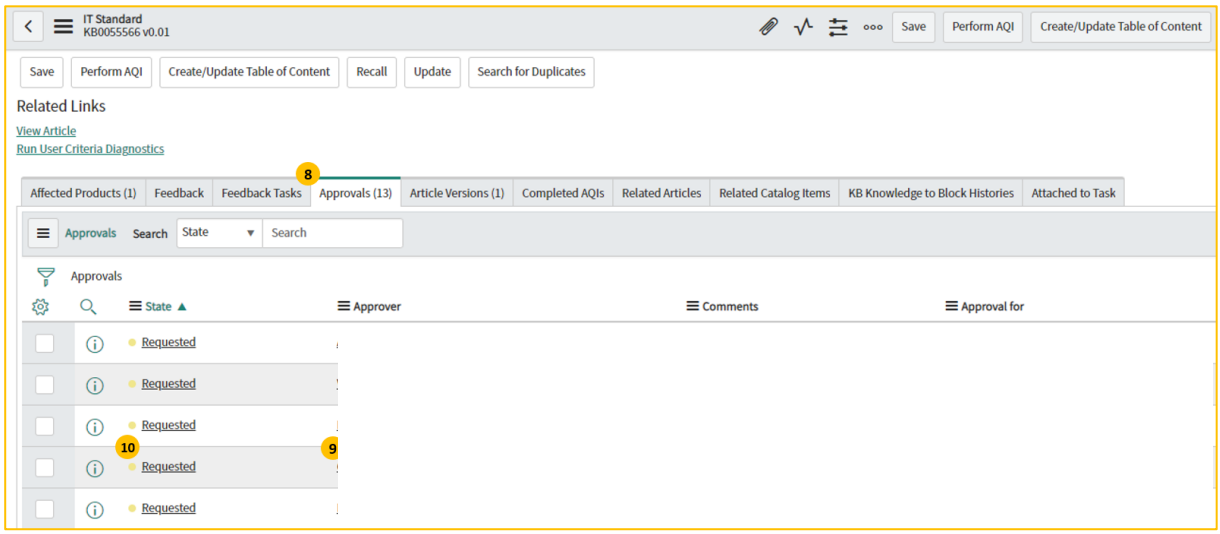


6. Select **Knowledge Article number** hyperlink
   i) **Note:** the knowledge article is in the **Review state** in the workflow

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

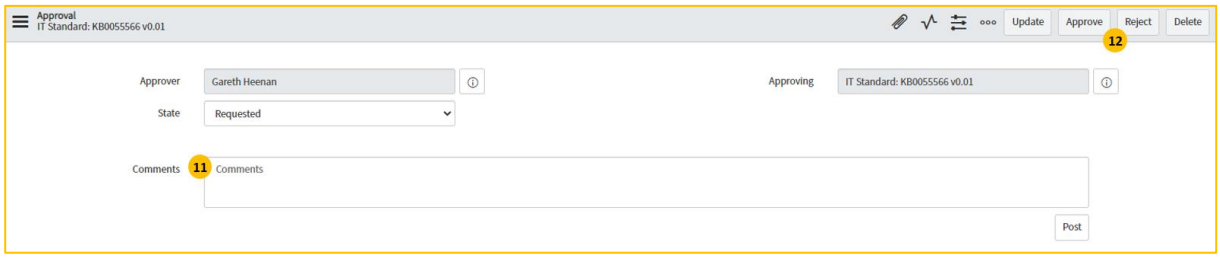


7. Review **knowledge article content**
   View the steps required for reviewing knowledge articles



8. Select **Approvals** tab at bottom of page
9. Locate your name in **Approver** column
10. Select **Requested** hyperlink in the **State** column next to your name

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.



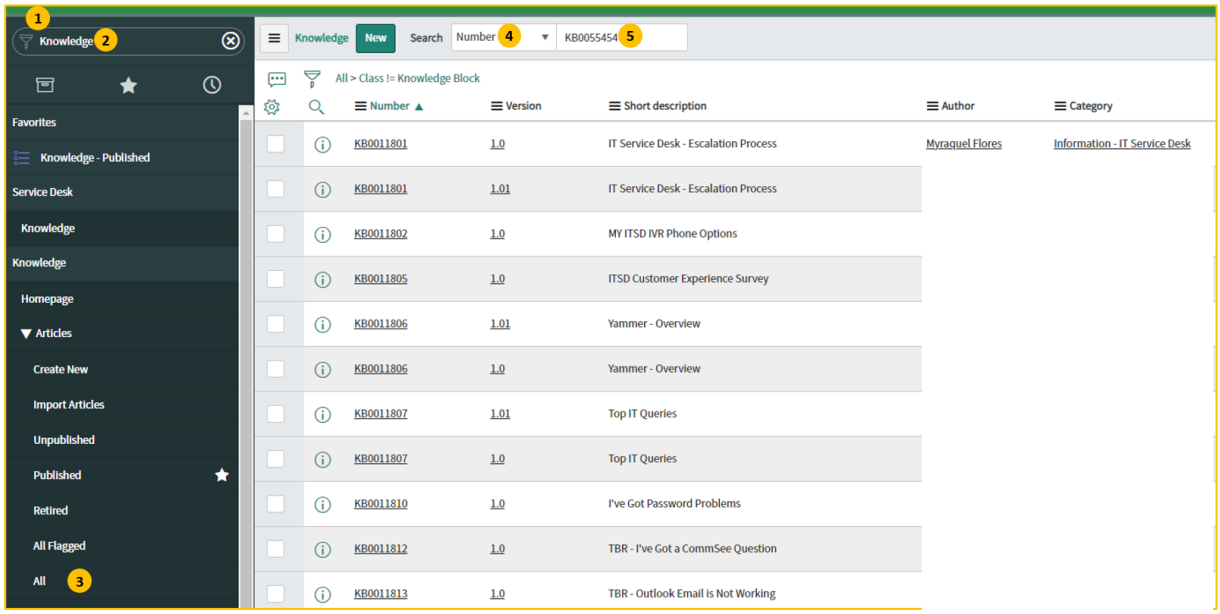
11. When rejecting retirement, Comments are mandatory
    When approving retirement, Comments are optional

12. Click **Approve** or **Reject** buttons

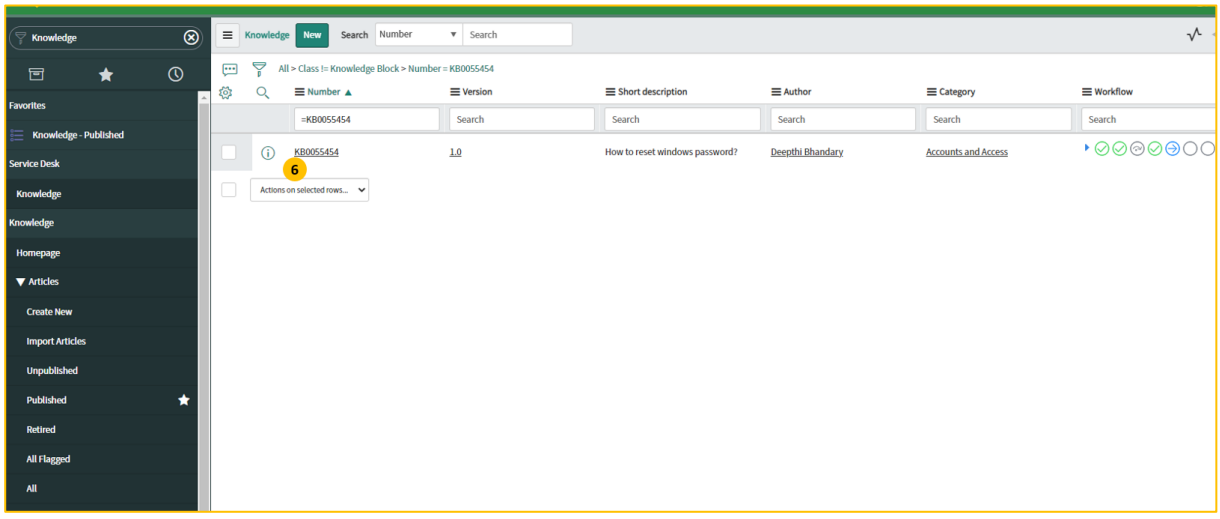
[Click here to return to the Work Instructions roles, workflows and processes homepage]

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When retiring a knowledge article, Knowledge Owners and Knowledge Managers follow these process steps

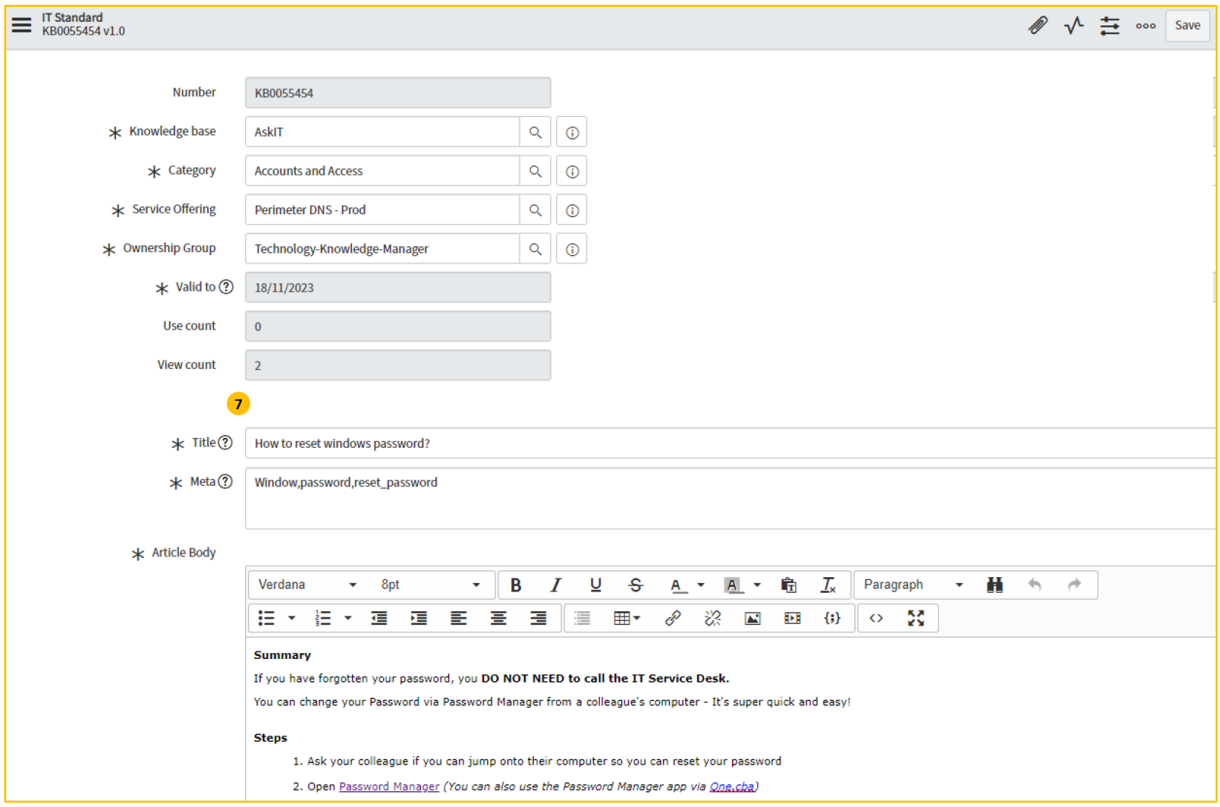


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **All** from the Articles dropdown
4. Select **Number** from the Search options
5. Enter **knowledge article number** in the search field and press **Enter**

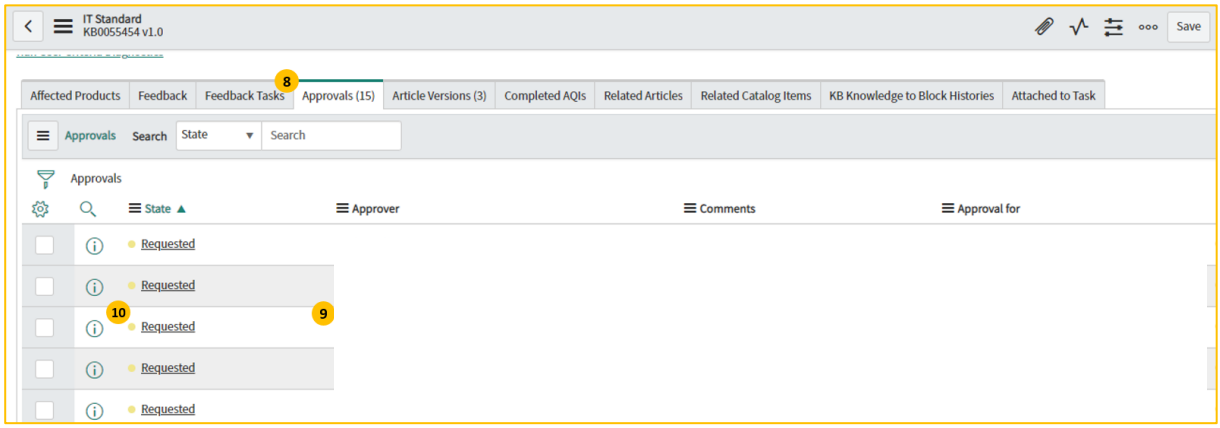


6. Select **Knowledge Article number** hyperlink
   Note: the knowledge article is in the Pending retirement state in the workflow

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

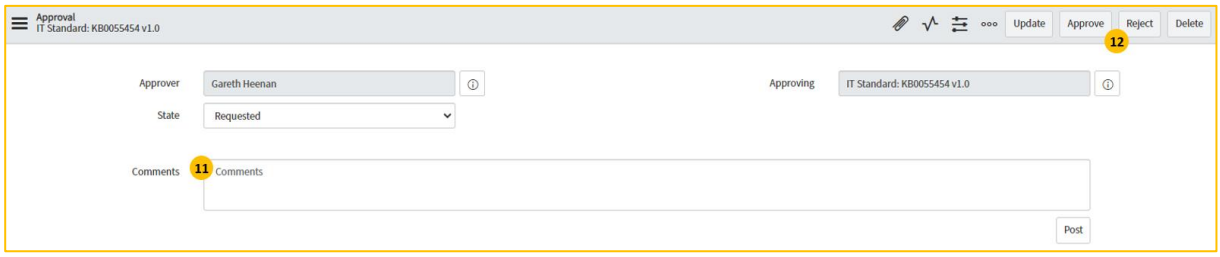


7. Review **knowledge article content**
   View the steps required for reviewing knowledge articles



8. Select **Approvals** tab at bottom of page
9. Locate your name in **Approver** column
10. Select **Requested** hyperlink in the **State** column next to your name

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.



11. When rejecting retirement, Comments are mandatory
    When approving retirement, Comments are optional

12. Click **Approve** or **Reject** buttons

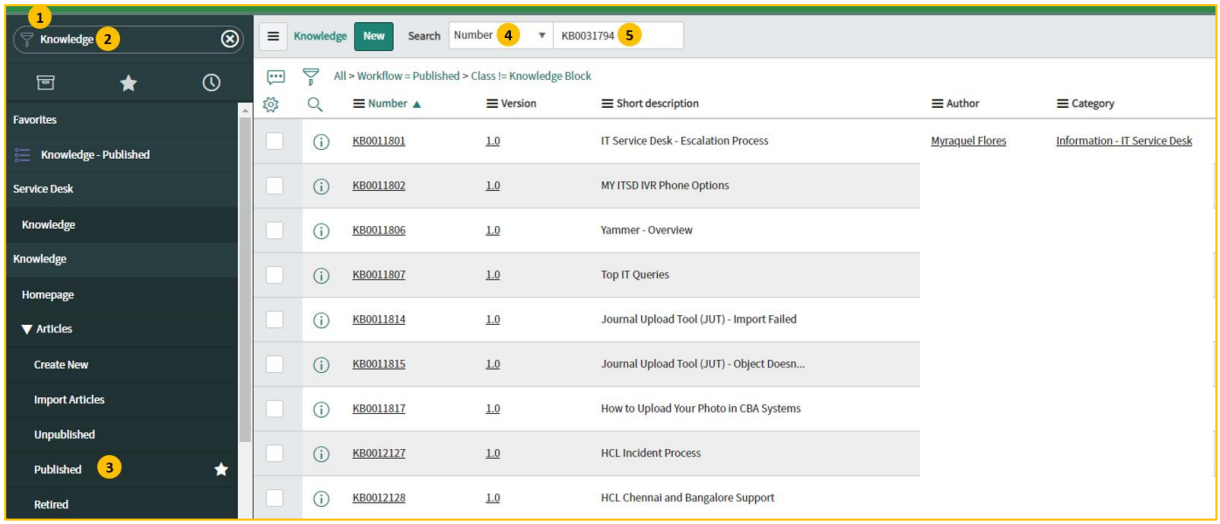
When retiring knowledge articles, please note:

- **The Article Body** will offer a different structure of heading prompts depending on the knowledge article template selected.

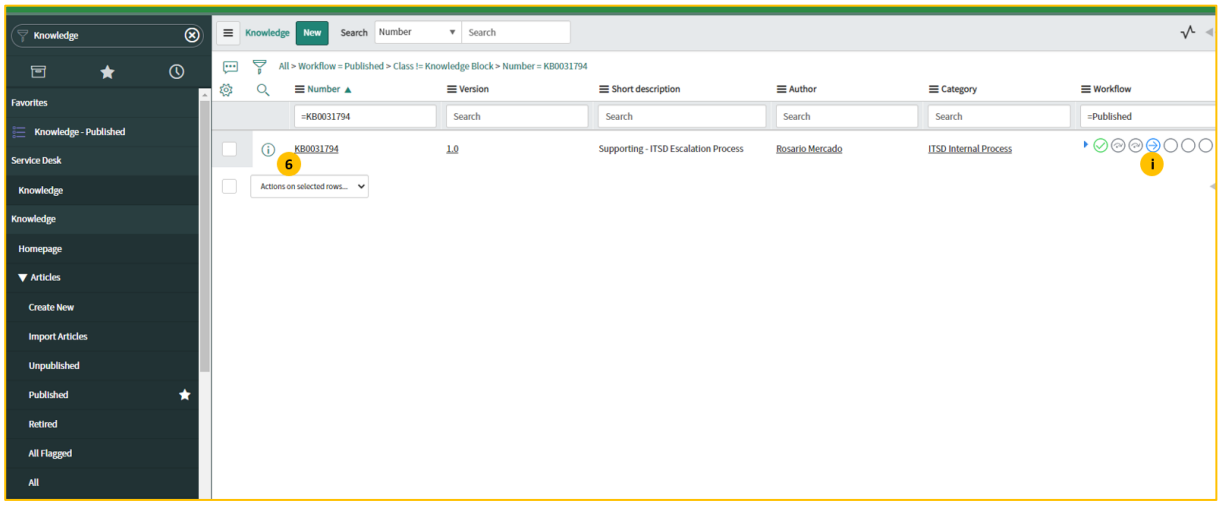
[Click here to return to the Work Instructions roles, workflows and processes homepage]

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When retiring a knowledge article, Knowledge Authors follow these process steps

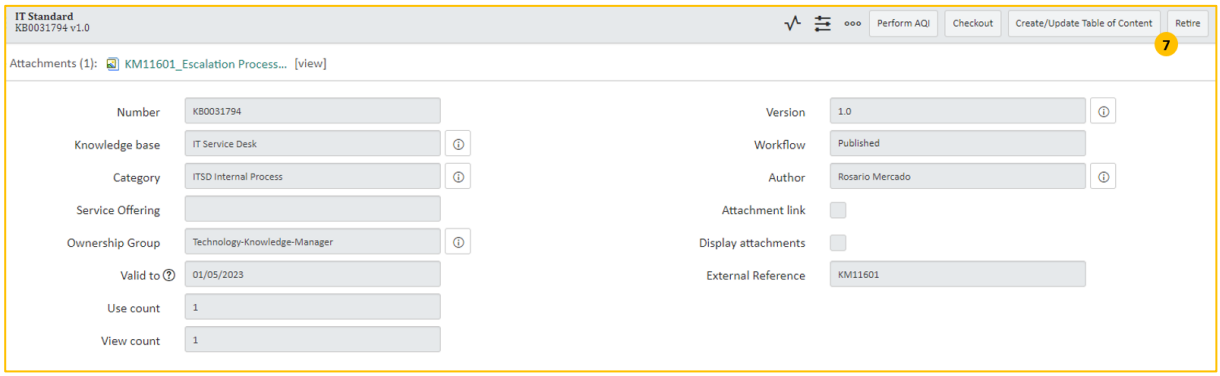


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **Published** from the Articles dropdown
4. Select **Number** from the Search options
5. Enter **knowledge article number** in the search field and press **Enter**



6. Select **Knowledge Article number** hyperlink
   Note: the knowledge article is in the Published state in the workflow

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

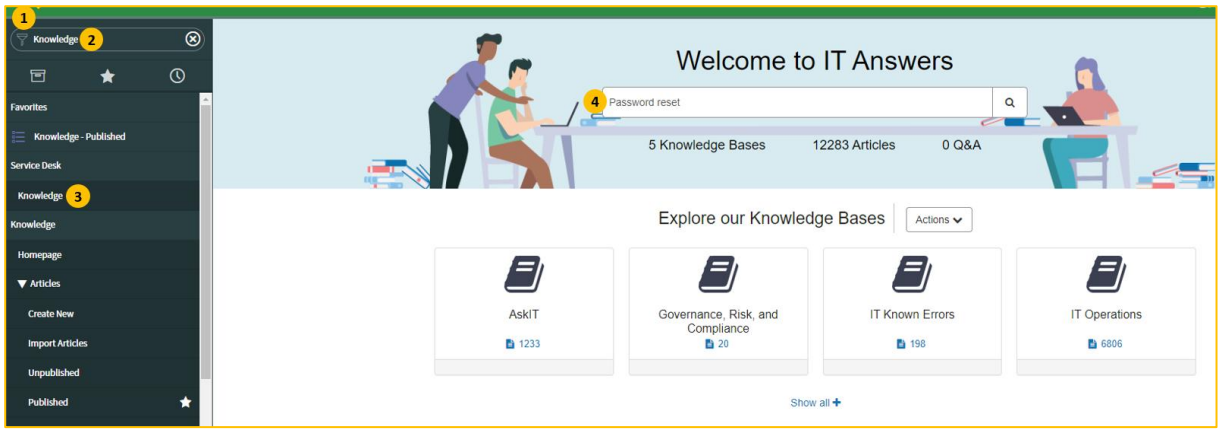


7. Click **Retire** button

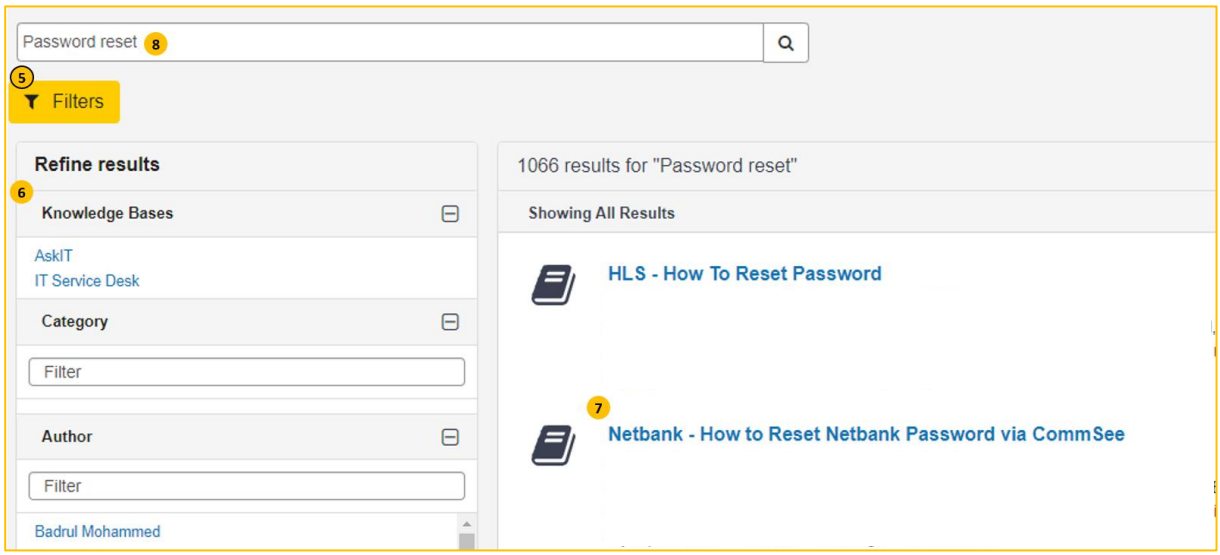
[Click here to return to the Work Instructions roles, workflows and processes homepage]

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

Viewing Knowledge Articles



1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **Knowledge** from the options
4. Enter keyword(s) in the **Search** field and press **Enter**



5. Click **Filter** button (optional)
6. Apply the **filters** required to refine your search (optional)
7. Select a **knowledge article hyperlink**

If search results do not provide the knowledge you require

8. Re-enter keyword(s) in the **Search** field and press **Enter**

[Click here to return to the Work Instructions roles, workflows and processes homepage]

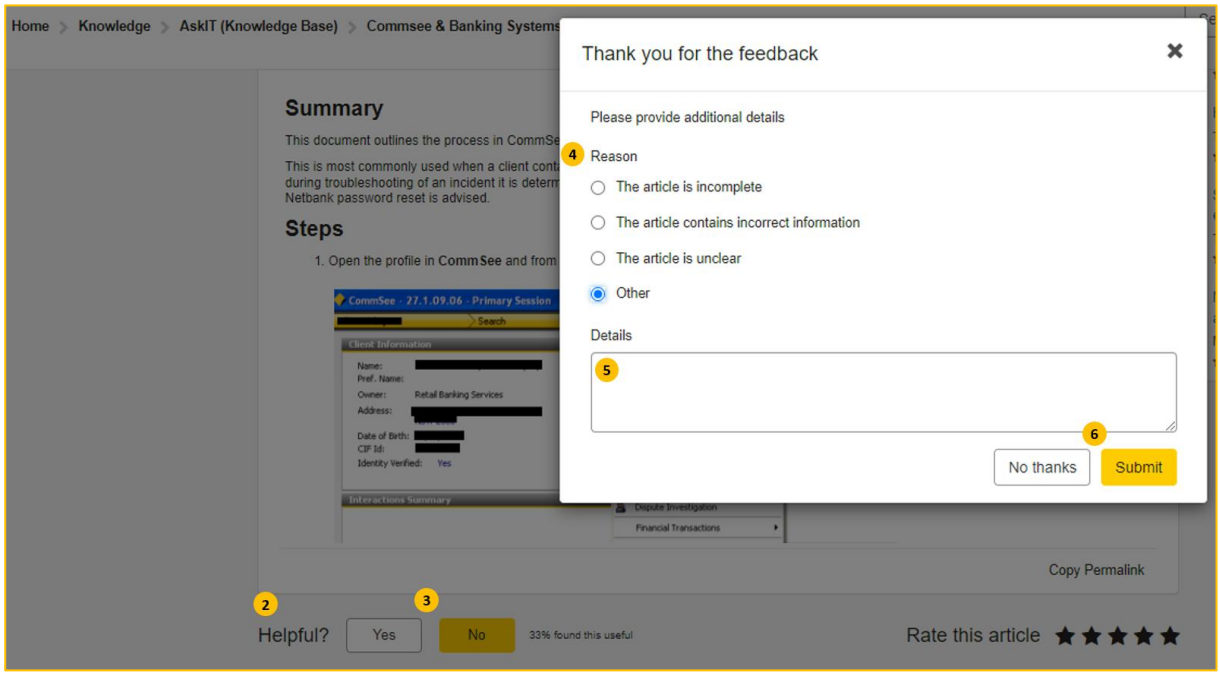
This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

Providing Feedback on Knowledge Articles

Note: As Knowledge Users, we can provide feedback on two levels, **Helpful?** and **Star Rating**

1. Stating and explaining whether the knowledge article was **helpful**
2. Giving the article a **star rating**

When explaining whether the knowledge article was helpful, follow these process steps



1. Select and view a knowledge article
   View the steps required for viewing knowledge articles here

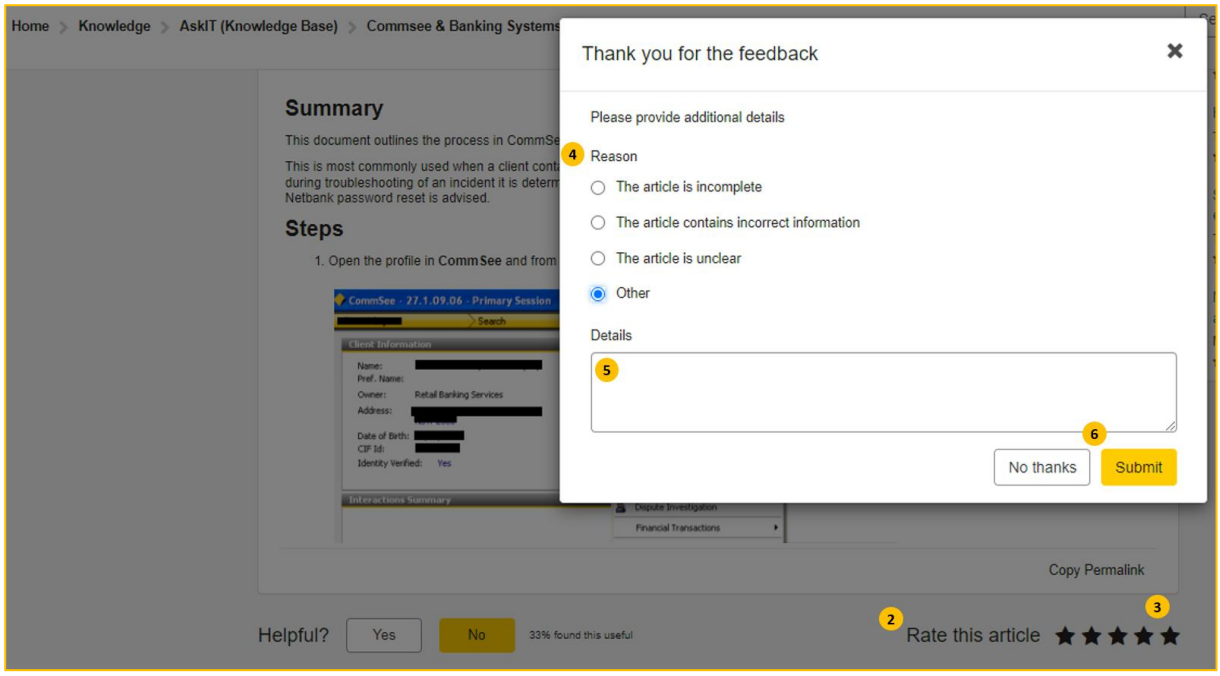
2. Locate **Helpful?**
3. Decide whether the article was helpful and click **Yes** button or **No** button

If **No** is selected

4. Select a **Reason** from the options
5. Select **Details** field and enter information explaining your reason
6. Click **Submit** button

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

When giving the article a star rating, follow these process steps



1. Select and view a knowledge article
   View the steps required for viewing knowledge articles here

2. Locate **Rate this article**
3. Decide how helpful the article was and select a **Star Rating**

If **1, 2 or 3 stars** are selected

4. Select a **Reason** from the options
5. Select **Details** field and enter information explaining your reason
6. Click **Submit** button

Click here to return to the Work Instructions roles, workflows and processes homepage

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

1. Performing Article Quality Index (AQI)

Applying the AQI to a Knowledge Article is performed by Knowledge Managers only.

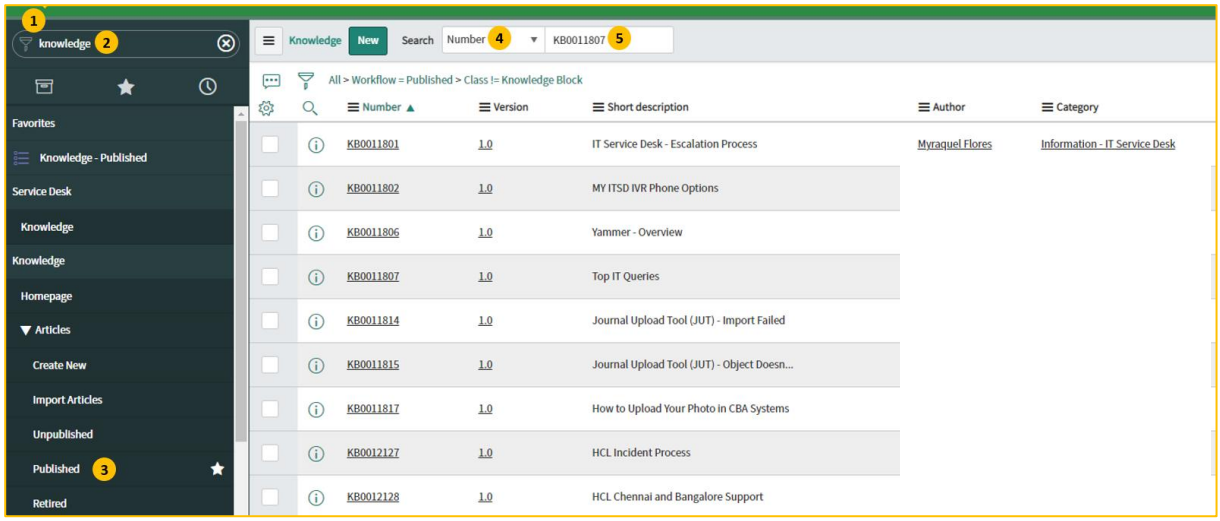
Knowledge assets should follow the quality guidelines as defined by the Article Quality Index (AQI). Intended AQI will have the following questions and weighting aligned.

Question	Weighting
Is the Knowledge Article unique?	10
Is the content accurate and relevant in the context of the Knowledge Base?	10
Is the Knowledge Article complete?	15
Is the title appropriate?	15
Does the Knowledge Article meet readability guidelines?	15
Are the external links and attachments valid and functional?	10
Are the Knowledge Base and Category fields filled out accurately?	10
Has the proper metadata been entered in the Knowledge Article?	10

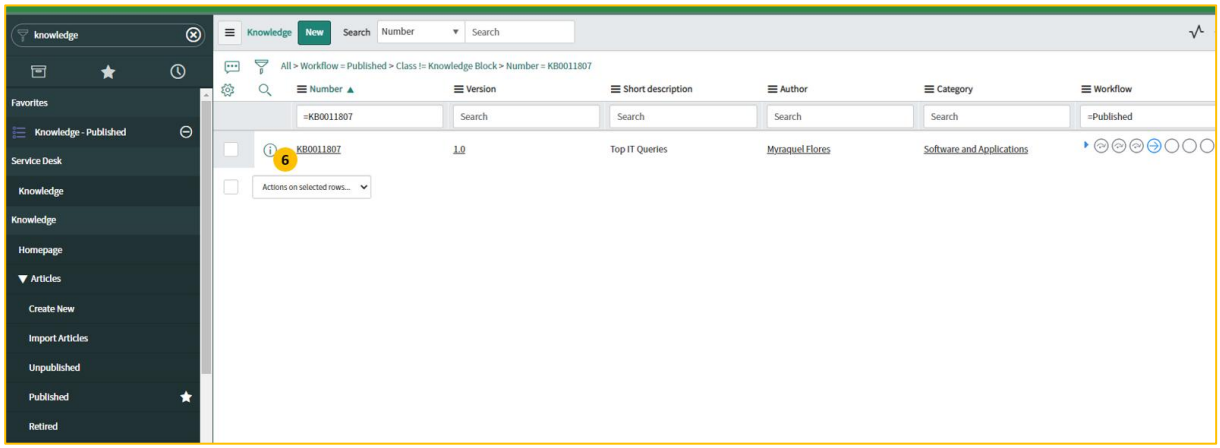
Note: the questions and weightings are subject to change.

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.

1.1 When performing AQI, follow these process steps

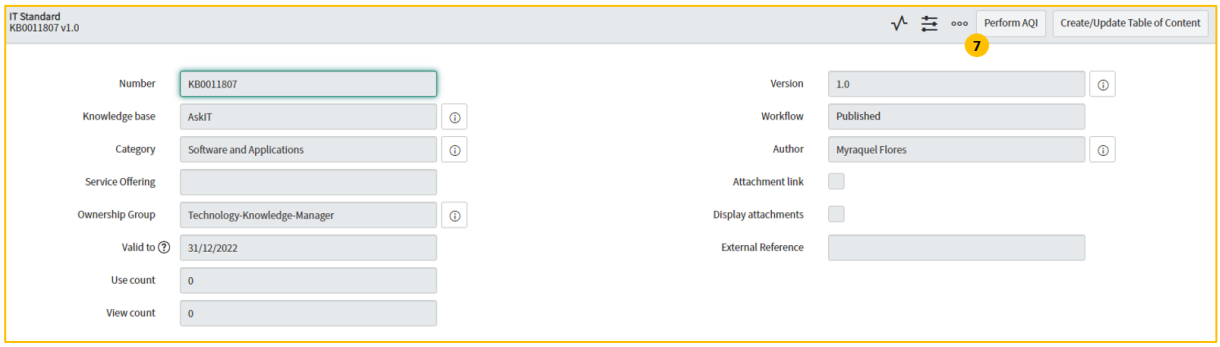


1. Login to ServiceNow and access the **Filter** field
2. Enter **Knowledge** in the **Filter** field
3. Select **Published** from the Articles dropdown
4. Select **Number** from the Search options
5. Enter **knowledge article number** in the search field and press **Enter**

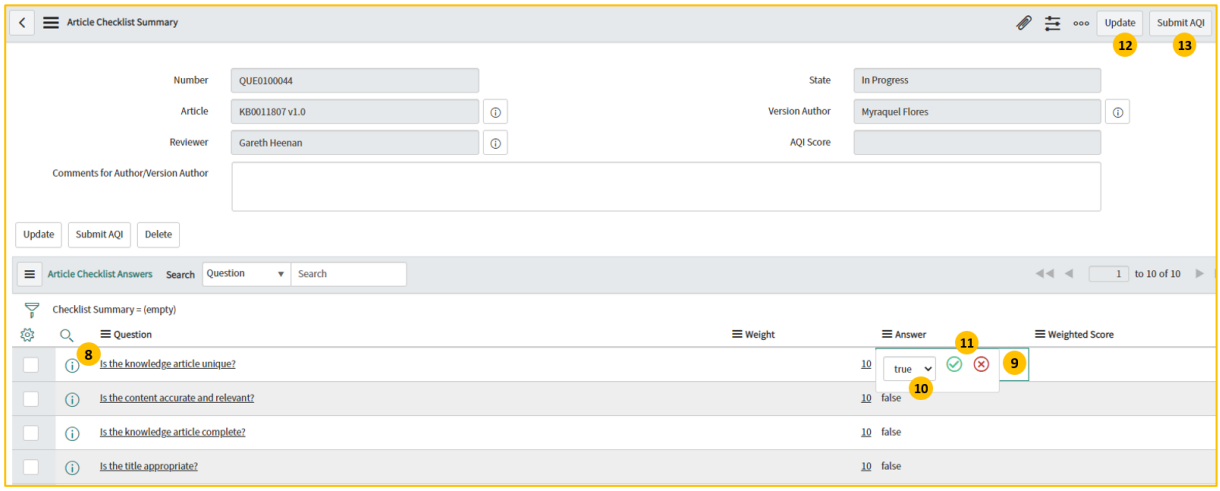


6. Select **Knowledge Article number** hyperlink

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.



7. Click **Perform AQI** button



8. Read the question in the **Question** column
9. Double click inside the corresponding **Answer** cell
10. Select **True** or **False** from the dropdown options
11. Select the **Green Tick** icon to update the answer
12. Click the **Update** button at any time to save your progress through the AQI questions
13. Click **Submit AQI** button when all questions are complete

[Click here to return to the Work Instructions roles, workflows and processes homepage]

This work sample has been anonymised and does not contain any sensitive, confidential, or proprietary data.
It is intended to showcase learning design principles and development expertise only.