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| Approved By: Michael Sink, UCF IT Chief Operating Officer | Page 1 of 58 |

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I. OBJECTIVE

The purpose of this document is to provide a framework, consisting of a standard operating procedure (SOP), style guide, and policies to govern and manage Knowledge Management. A major objective for the framework established herein is to facilitate gathering, analyzing, storing, and sharing knowledge and information within the university's IT Service Management (ITSM) Application. This data will be used with the intention of improving efficiency, reducing the need for rediscovery of information, improve response times, enhance knowledge transfer, and enrich the quality of information available for students, staff and faculty across the university.

II. DEFINITIONS

Content Owner/Technical Reviewer: The individual is a subject matter expert in a specific technical area, such as an application, hardware or software. Content Owners have the ServiceNow Knowledge role "Knowledge" and they will be included in the ServiceNow user group "UCF IT Knowledge Tech Reviewers."

ITSM Application: The application, ServiceNow, used by UCF IT as the solution for knowledge management, and other related processes such as incidents, problems, requests and changes.

ITSM Manager: The individual provides leadership and governance for process owners to define, implement, communicate and improve service management processes. This individual is accountable for ITSM Application governance, strategic planning and road mapping, maintenance and support functions.

Knowledge Base (KB): A knowledge base is a form of division and categorization of knowledge. All knowledge articles related to a high-level category will be grouped into one Knowledge Base. University needs and the technical limitations of the ITSM application also determine Knowledge Base creation. Two Knowledge Bases are setup through the ITSM Application for UCF IT knowledge organization. The "UCFIT Knowledge Base" organizes public-facing articles, and the Knowledge Base, "UCF IT Internal" organizes IT-specific knowledge articles.

Knowledge Management (KM): Knowledge Management defines all aspects of creating, storing, categorizing, publishing and retiring of knowledge bases and knowledge articles as defined by Knowledge-Centered Support (KCS) and Information Technology Infrastructure Library (ITIL).

Knowledge Management Roles: Predefined roles determined by the ITSM Application that provide access and permission to particular actions within the Knowledge Management module. See Roles and Responsibilities and Table 1.

Knowledge Management Working Group: A university-wide group that will make recommendations towards the procedures, policy and documentation necessary for Knowledge Management.

Knowledge Manager: The individual manages and coordinates the daily KM activities, ensuring execution of the document. Individuals identified as Knowledge Managers will have the ServiceNow Knowledge role of “Knowledge Manager” and will be included in the ServiceNow user group “UCF IT Knowledge Managers.”

Process Owner of KM: The individual ensures that UCF IT is able to gather, analyze, store and share knowledge and information. The Process Owner’s primary goal is to improve efficiency by reducing the need to rediscover knowledge and maintain this SOP.

Style Editor: This individual is an expert on style, word choice and familiar with UCF Communication and Marketing guidelines. Style Editors have the ServiceNow Knowledge role “Knowledge” and they will be included in the ServiceNow user group “UCF IT Knowledge Style Reviewers.”

Web Form: A Web form, created through the ITSM Application that provides a method for individuals without the appropriate licensing to submit knowledge into Knowledge Management.

III. ROLES AND RESPONSIBILITIES

The Knowledge Management Working Group will facilitate the continual service improvement (CSI) of procedures, metrics, policies and documentation for Knowledge Management. The working group will meet on a regular interval in order to help improve the policies and procedures. The Knowledge Management Working Group will send recommendations to the Process Owner of KM, and then, if approved, send to the ITSM Manager.

The ITSM Application defines particular roles and groups to manage and organize knowledge. Particular roles are required to use certain functions within the Knowledge Management module. Role assignments and group memberships may be changed or removed based on changes of employment or responsibilities in UCF IT. Table 1 describes the group names and roles used by UCF IT.

Table 1 Group Names and Roles Assigned

| User Group Name | SN Role Assigned | Name | Group Description |
|-------------------------------|------------------|---------------|---|
| UCF IT Knowledge Contributors | Knowledge | Anyone | This will be the group used for all knowledge article contributors to the internal knowledge base. This will allow users to create knowledge without having to use the public-facing request form. Any account with the ITIL role will be a member of this group. |
| UCF IT Knowledge | Knowledge | Content Owner | This will be the group used for approving the technical content of an article. Technical approval is the first step in the publication workflow after it goes into a draft state by a contributor. The KB category determines who |

| | | | |
|----------------------------------|-------------------|-------------------|--|
| Tech Reviewers | | | will be a Content Owner. Technical Reviewers are expected to have a general understanding of the knowledge management process, as well as an in-depth technical understanding of the KB category or sub-category for which they are Technical Reviewer. |
| UCF IT Knowledge Style Reviewers | Knowledge | Style Editor | This will be the group used for approving the content for style. Style review is the second approval step in publication workflow. Style Editors are expected to have a general understanding of the knowledge management process, as well as an in-depth understanding of the Article Style Guide and the usage of categories. |
| UCF IT Knowledge Managers | Knowledge Manager | Knowledge Manager | This will be the group used for final approval steps as well as article retirement. This group has full access to both the published and retired workflows. This group approves new KB article categories and sub-categories. Knowledge Managers are expected to have an in-depth understanding of the knowledge management process, a general technical understanding of all KB categories and in-depth understanding of the Article Style Guide and the usage of categories. |

IV. POLICY

The policies and procedures established herein will govern all Knowledge Management activities, processes and procedures. KCS principles and ITIL best practices will be the foundation for Knowledge Management procedures, practices and policies.

The expectation is for all UCF IT staff to be familiar with knowledge management policies and procedures, and follow them to best of their ability. Everyone is responsible for producing and recording knowledge articles related to the services they support. Everyone has the responsibility to submit knowledge into KM and check for duplication. Everyone has the responsibility to assist with the integrity and quality of the articles, including flagging articles for technical accuracy or inconsistent styling. Everyone has the responsibility to have the client in mind when creating an article in order to provide the necessary information to help accomplish the task or know what actions to take through the article content. Knowledge Management is a community-driven solution, and those found abusing the policy or not following the procedure will be coached by a Knowledge Manager or Process Owner of KM on proper use; repeated misuse may result in revocation of Knowledge Management role(s) and sharing the situation with the individual's direct supervisor.

Any person closing an incident must make an assessment to link an existing knowledge article or create a new article when an incident is closed. UCF IT Support Center Management and Team Leads will review incidents without linked knowledge articles for commonality and quality of closure notes to identify new knowledge creation opportunities. The review process also helps eliminate missing and duplicate knowledge, as well as reduce the number of draft articles. All ITSM-related processes warrant KB article creation.

All information used by UCF IT to support clients, services, technology or solve IT-related issues also warrant knowledge creation consideration. All Service Catalog items should have some associated knowledge. Generally, the KB article content should focus on university-specific information and the author should leverage and reference vendor and third-party knowledge articles or documentation whenever possible. Including hyperlinks to third-party vendor knowledge as part of UCF IT KB article is highly encouraged. Every article should be written with the intent of offering a complete solution or information package that provides a comprehensive self-help capability to the client or UCF IT staff member using it regardless of what Knowledge Base it resides.

All articles need to a category and article type, which should be identified as early in the lifecycle as possible. Article types should determine the focus and intent of an article; however, article types are independent of the KB and should be incorporated in internal- or external-facing KBs. See the Article Style Guide for more information. Knowledge Base categories and sub-categories should be determined based on UCF's Service Catalog and "The Higher Education IT Service Catalog: A Working Model for Comparison and Collaboration" article published by the EDUCAUSE Center for Analysis and Research. A Knowledge Manager must approve new categories.

All submitted articles will go through a lifecycle process to ensure accuracy, non-duplication and consistency. Every article will undergo a technical review for technical and procedural accuracy, which will be performed by staff that have demonstrated knowledge in the categorized domain. Every article will undergo a style review to check for consistency of word choice, voice and tone, following the Article Style Guide. A final review prior to publication will provide a comprehensive technical and style review and ensure the article category and contents align for the category and complement other articles. Every article will have a one-year automatic review. The automatic review initiates an article to go through the standard review process outlined in the Expiration/Retire Procedure and the Retirement Lifecycle. Never-published articles, determined a duplicate or unnecessary, will immediately move into the Retirement Lifecycle

Audits, reviews and revisions of the Knowledge Base documentation as necessary at a minimum interval of every two years to ensure continued relevance and appropriate execution. Modifications to procedures will occur as required with approved procedural revisions. Any major changes or updates with the ITSM Application will initiate a review of the procedures for newly introduced technical limitations or features.

V. PROCEDURES

This section provides an overview of the lifecycle, from creation to retirement, of a KB article, and it includes a lifecycle workflow of all the stages involved in the process.

A. Creation

KB creates initiates from an incident within the ITSM Application; by an update, change, or new service that requires self-service help and information (planned knowledge); or through a Web-based client request form. When drafting an article, the article type determines what recommended templates and section headings to incorporate into the article. Creation can take place by using the existing Word templates and the ITSM KB import feature or directly creating the KB article in the ITSM Application KB article editor. See “Creating an Article” in the How-to Documents Appendix for more information and systematic instructions.

B. Submission for Review

The KB article author submits the draft article for technical and style review. Based on the criteria outlined in the Policy section and in the Article Style Guide, draft article categories, content, keywords, audience, and other fields might be edited and discussed with the author or another reviewer before review action is taken. KB articles comments might also be used to communicate changes, concerns, and updates. Once the technical and style reviews have been approved, the article is ready for final review by a Knowledge Manager for publishing to the KB. See “Editing an Article” and “Technical-Reviewing an Article” in the How-to Documents Appendix.

C. Publishing

The Knowledge Manager reviews the article based on the criteria outlined in the Policy section, and then approves or denies the article for publication to the appropriate Knowledge Base based on the intended audience of the article. Approvals and denials may include comments and discussion both prior and after a Knowledge Manager takes action. The default life span of an article is one year from the creation date. An article receives a one-year lifecycle based on its publication date or last update date. See “Publishing an Article,” “Technical-Reviewing an Article” and “Style-Reviewing an Article” in the How-to Documents Appendix.

D. Expiration/Retire

A Knowledge Manager will initiate the article Retirement Lifecycle for any articles fitting the expiration or retirement criteria as outlined in Policy section. Knowledge Managers can immediately delete qualified never-published duplicate or unnecessary articles. The Knowledge Manager sends the article to the designated Content Owner for review. The Content Owner and Knowledge Manager first decide if the article remains relevant. If it is not, then the Content Owner will recommend that the Knowledge Manager retire the article. If the article is still relevant to current solutions, practices, services, and catalog items, the Content Owner will review the content and treat it as a new submission for review, updating any content where necessary. The review continues with a style review and then to the

Knowledge Manager for final review and re-publication or update of the valid date of the article for future lifecycle expiration or retirement reviews.

The Content Owner and Knowledge Manager will designate a retired article by its state, change the article content to show clearly it is retired, and provide additional information on why it was retired. A Knowledge Manager will review and delete any retired articles on the one-year retirement anniversary or sooner if applicable.

E. Lifecycle Workflows

Knowledge articles follow a lifecycle defined by workflows built into the ITSM Application. The workflows are comprised of steps taken to approve the publishing and retirement of knowledge. Each step or stage requires has associated Roles and Responsibilities, Policy and Procedures, which can move the article into different states and stages within its lifecycle. The initial knowledge approval lifecycle is not always linear as some review actions can move an article to an earlier stage; for instance, an article can pass technical review and return to technical review after final review. Article editing can occur in every stage of the lifecycle.

1. Publishing Lifecycle

The publishing lifecycle is the primary lifecycle workflow for Knowledge Base articles. Figure 1 demonstrates the publishing workflow including the stages, roles, and actions involved with the lifecycle.

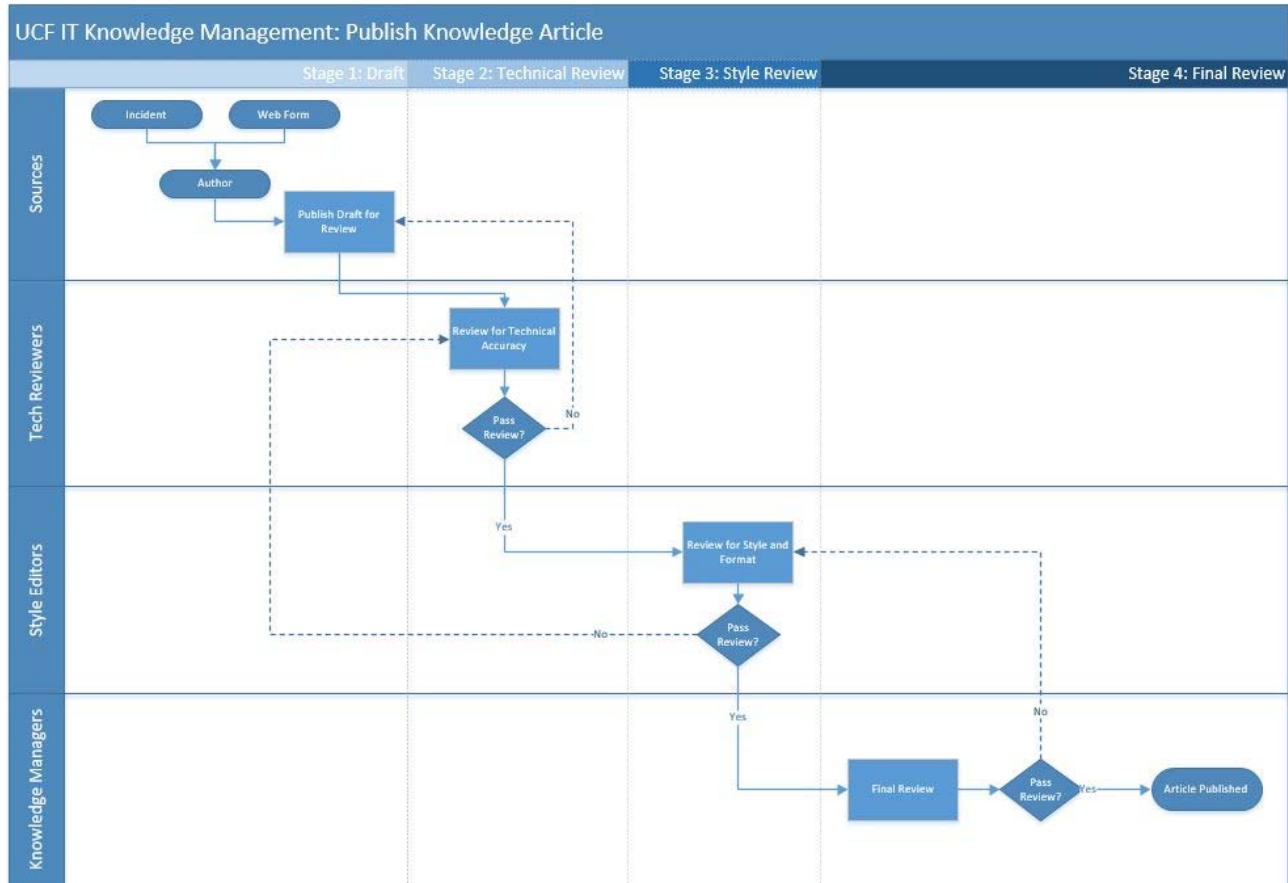


Figure 1 Publish Knowledge Article Lifecycle with Stages, Roles and Actions

Stage 1: Draft

Knowledge articles have three typical sources. The draft creation method for each source is different; however, the workflow is the same regardless of the origin of the content. Table 2 outlines the three sources and the creation method.

Table 2 Sources and Creation Methods for Knowledge Base Articles

| Source | Creation Method |
|-------------------|---|
| Incident Closure | When an incident ticket is closed, a technician can select to turn the close notes automatically into an article that links to the incident. Any account with the Knowledge role and in the UCF IT ServiceNow User group can select this option when closing an incident. |
| Planned Knowledge | When an update, change, or new service that requires self-service help, support or information, UCF IT needs to draft a new article or series of |

| | |
|------------------|---|
| | articles to support the service. Any account with the Knowledge role and in the UCF IT ServiceNow User group can select this option when closing an incident. See “Creating an Article” in the How-to Documents Appendix. |
| Web Request Form | Any account in ServiceNow has the opportunity to propose knowledge or article enhancements for any services or incidents. The person would submit a ServiceNow request and the request would automatically create a draft KB article. |

A draft article completes the draft stage when a person submits it after creation from one of the above source methods. See “Creating an Article” in the How-to Documents Appendix.

Stage 2: Technical Review

Content Owners review articles for technical accuracy, relevance and merit, and they edit articles as necessary. The Knowledge Management Working Group determines the Content Owners based on the KB category and expertise of the individual. The technical review helps ensure that the articles that will reliably resolve the problems the author intended the article to solve and provide the information that empowers individuals to complete common IT-related tasks without directly involving UCF IT. Content Owners have the ability to review all draft articles; however, Content Owners assigned to the KB category will perform the technical review.

A reject or approve action on the draft article completes the Technical Review stage. A rejected article returns to the draft state where the author must edit and resubmit or flag it for retirement. Approved articles move to Stage 3: Style Review. See “Technical-Reviewing an Article,” “Flagging Articles” and “Retiring an Article” in the How-to Documents Appendix.

Stage 3: Style Review

Style Editors review articles for consistency of language, grammar, voice tone, formatting, and appropriateness of the style’s content based on the Article Style Guide. Style Editors edit articles as necessary. Style Editors take the audience the article is intended to serve as a critical consideration as part of the review to ensure help comprehension and clarity. Style Reviewers have the ability to review all draft articles within a KB. The Knowledge Management Working Group determines the Style Reviewers based on expertise of the individual. Style Reviewers work with Content Owners to maintain technical accuracy through style edits.

A reject or approve action on the draft article completes the Style Review stage. A rejected article returns to the draft state where the author must edit and resubmit or flag it for retirement. Approved articles move to Stage 4: Final Review. See “Style-Reviewing an Article” in the How-to Documents Appendix.

Stage 4: Final Review

Knowledge Managers perform an additional technical and style review of an article and ensure the article category and contents align for the category and complement other articles to add to a comprehensive KB.

A delete, approve or reject action on the draft article completes the Style Review stage. A rejected article returns to the draft state where the author must edit and resubmit or flag it for retirement. Approved articles become a published KB article, and the workflow is complete. See “Final-Reviewing an Article” in the How-to Documents Appendix.

2. Retirement Lifecycle

The retirement lifecycle is the update and retirement lifecycle workflow for published KB articles. Similar to the publishing lifecycle, Figure 2 demonstrates the retirement workflow including the stages, roles, and actions involved with the lifecycle.

A Knowledge Manager initiates the retirement process; however, anyone aware of a potential problem can contact a Knowledge Manager or flag an article to have it addressed. The default life span of an article is one year from the publication date. At the one-year anniversary, the Knowledge Managers will initiate the retirement process. Flagging an article can also initiate the retirement process at the discretion of the Knowledge Manager. See “Flagging Articles” and “Retiring an Article” in the How-to Documents Appendix.

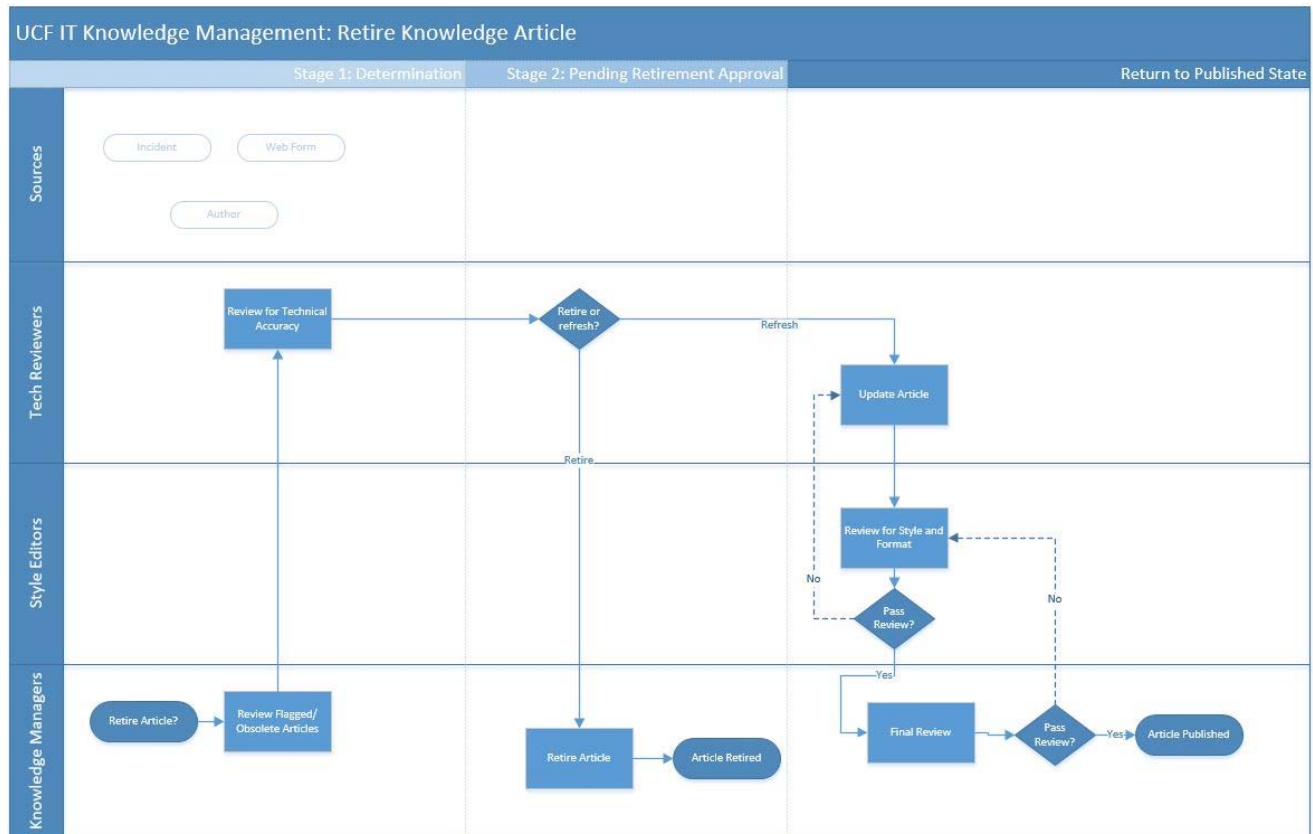


Figure 2 Retire Knowledge Article Lifecycle with Stages, Roles and Actions

Stage 1: Determination

A Knowledge Manager determines if a published article needs review by the Content Owner for retirement, updating, or refreshing to reflect any changes in services, procedure or information. The basis of determination includes reviewing the article, article comments, relationship to incidents, communication received about the article and its overall current state. Knowledge Managers can immediately delete any never-published articles as outlined in the Expiration/Retire Procedures.

A retire or un-flag action on a published article completes the determination stage. A retired article moves to Stage 2: Pending Retirement Approval. An un-flagged article stops the retirement process from continuing. See “Retiring an Article” in the How-to Documents Appendix.

Stage 2: Pending Retirement Approval

A Knowledge Manager works with the Content Owner to complete the retirement of the article or refresh the contents. Updating the contents follows the same processes as Stages 2-4 of the Publishing Lifecycle.

A delete, approve or reject action on the pending request completes the Pending Retirement Approval stage. Rejecting a pending retirement approval will return the article to its previous state as a published article. A Knowledge Manager can immediately delete never-published articles. Retiring an article removes its publication status, and it will no longer be searchable or appear in the front-end of the KB. See “Retiring an Article” in the How-to Documents Appendix.

VI. APPENDICES

A. Article Style Guide

UCF IT follows the writing guidelines of UCF Communications and Marketing as well as the Associated Press Stylebook for knowledge articles unless otherwise noted here. This guide is a supplement to these resources and additional references for styles, consistency, spelling, terms often encountered with IT, visual layout and format, and templates not discussed in them.

1. Article Types

Each article has a type that dictates what template and headings to incorporate into the article. Table 3 demonstrates the article types, use and potential headings.

Table 3 Article Types, Use and Example Headings

| Type | Use | Example Headings |
|-----------------|---|------------------|
| How-to | Use to provide instructional, systematic, or procedural content about a service or technology solution. Typical articles will include sequential steps to configure, setup, enabled or activate technology, and references to informational and troubleshooting articles. | |
| Informational | Use to provide general information about a service, catalog item, or technology solution. Information might include contact information, explanation of the service, references to how-to and troubleshooting articles, and non-instructional content. | |
| Troubleshooting | Use to provide systematic or procedural content to fix or provide a workaround for a specific technology solution. Typical articles will include references to informational articles, multiple sets of sequential steps to solve the issue, and additional troubleshooting references. | |

2. Use of Language and Terminology

Verbs

Table 4 Verbs and Use Cases

| Word | Use |
|------|-----|
|------|-----|

| | |
|----------------------------|---|
| click, double- click | Use to describe the default or primary pressing of the mouse button usually in conjunction with the mouse cursor hovering on an actionable item or object. A double-click represents when two clicks in rapid succession. Examples: Click the “OK” button. Double-click on the folder to open it. |
| select | Use to describe the action of choosing items from a list, drop-down menu, check boxes or radio buttons. NOTE: When writing instructions, include additional steps needed to create an action when the act of selecting requires more user interaction. Example: Select the “Secure” check box, and then click “OK.” |
| press | Use to describe pressing and immediate releasing a key or combination of keys on a keyboard. Example: To continue, press “Enter.” |
| hold down | Use to describe pressing and holding a key or combination of keys on a keyboard. Examples: To start up MacOS Recovery, hold down Command (⌘)-R. Hold down ALT + F4 to exit the program. |
| hover | Use to describe the user positioning their mouse cursor over an element displayed on a screen, but has not clicked or activated the element. |
| tap | Use to describe the gesture used with touchscreen devices that usually acts like a mouse click. Example: Tap the “OK” button to continue. |
| swipe | Use to describe the gesture used with touchscreen devices that usually relates to some action. With swipes that require a direction, write as two words. Example: Swipe down to reveal the menu. |
| type | Use to describe the pressing and immediate releasing keys on any form of keyboard for entering data. Example: Type your first name into the name field. |
| open | Use to describe the action of opening a file, window or dialogue box that is usually associated with clicking, double-clicking, or selecting documents or files. Example: Open the file by double-clicking, which will start Microsoft Word if it is not already started. |
| start | Use to describe the action of running or initiating an application. Example: Double-click the Chrome icon to start Chrome. |
| navigate | Use to describe the action of opening or requesting a Web page that is usually associated with clicking on a hyperlink on a website. Example: Navigate to the form by clicking on the eForms menu item. |
| download | Use to describe the action of downloading a resource from a website that is usually associated with clicking on a hyperlink. Example: Download the PDF file if you prefer |

to print the meeting minutes.

Preferred Words

Table 5 Preferred Words and Use Cases

| Word | Use |
|---------------------------------|---|
| .NET | Use a “.” in front and capitalize “NET.” Pronounced “dot net.” |
| back end | Two separate words. Used to describe systems. |
| browser | Use browser instead of Web browser when possible. |
| button | Used to describe a graphic element on a toolbar, webpage, or dialog box that produces an action. Examples: Use the “Next” button to go to the next page. Click the “Submit” button to finalize your payment. |
| Cat 5 cable | Capitalize “C” or use all uppercase letters, and use a space. Example: The CAT 5 cable connects your computer to the network. |
| check box | Use to describe a user interface that displays multiple options as boxes that can be selected on or off. |
| coaxial cable | Spell out coaxial. Do not abbreviate coaxial. |
| database | All lowercase. |
| disc, disk | A disc uses vinyl or optical storage (e.g. a DVD). A disk uses magnetic storage like a floppy disk or hard disk. |
| drop-down, drop-down menu | A list that displays options and can produce an action. |
| Ethernet | Capitalize “E.” |
| front end | Two separate words. |
| homepage | One word. |
| icon | Used to refer to a small graphic element that is associated with a program, function, or alert. Icons initiate, start, or alert. Examples: Double-clicking the “Half-life 3” icon to initialize the game may produce a “File not found” error. Tap the “Settings” |

icon to initialize the settings menu.

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| link | Same as a hypertext link. |
| list box | Displays a list options or elements within a designated area. |
| listserv | All lowercase. |
| log in | Two words. Write as three words when including “to.” Use the term to match software when possible. See “sign on” entry. Example: Log in to email client. |
| log on to, log off from | Three words. Use the term to match software when possible. Use log on to and log off from for sessions on a computer or a network. See “sign on” entry. |
| log-in | Use as a noun modifier and not as a verb. Example: Enter your log-in name (e.g. type in your log-in name). Never use as a verb. Sign-on is preferred. |
| online | Lowercase. No hyphen. |
| password | Lowercase. |
| RJ (Registered Jacks) | Capitalize “RJ” and use a hyphen when specifying a type. Example: The RJ-11 modular jack is cracked, and it will need replacement. |
| setup | Use to describe when a desktop or device has been configured and physically installed at a location, or when this is taking place. Examples: Your new computer was setup in your office this morning. We setup your external hard drive with the latest encryption. |
| sign on | Two separate words. Write as three words when including “to.” Use the term to match software when possible. Preferred term. |
| sign on, sign off | Use sign on and sign off as verbs to refer to connecting to and disconnecting from a network or application. |
| sign-on | Use as a noun modifier. Never use as a verb. Example: Do not share your sign-on credentials with anyone. |
| sign-on, log-on | Use sign-in (log-on, sign-on, sign-in) as a noun modifier. Use the term to match software when possible. Example: Sign on to the network and type your sign-on name and password. |
| smartphone | One word, no spaces or hyphens. |

| | |
|-----------------|---|
| text box | Refers to a box in which you can type. |
| to-do | One word with hyphen when modifying noun. “to-do list” |
| URL | All uppercase. Plural is URLs. Avoid ending sentences with URLs (e.g. Click on www.ucf.edu.) |
| user | Use user instead of client for KB articles. |
| username | One word. Refers to a user’s handle or account name used to access a system. See “NID” entry. |
| username | One word. |
| Web | Capitalize when referring to the world wide web. |
| webpage | One word and lowercase. |
| website address | Common usage for referring to a URL. |

UCF-Specific Nomenclature

Numerous technologies and terms comprise UCF IT services. While many of the technologies have vendor-specific naming, UCF IT recognizes the need to use specific names for an overall service and to create university-specific terms to facilitate a common experience among users of those services. Table lists many of the university-specific service names and terms.

| Word | Use |
|---------------|---|
| eCommunity | Always lowercase “e” with capital “C”. |
| eFax | Always lowercase “e” with capital “F”. |
| eForm | Always lowercase “e” with capital “F”. |
| EmplID | Capital “E” and “ID”. See “PID” entry. |
| ISO | 16-digit identification number located on the UCF Card, which also includes a person’s name, UCF ID and library number. |
| Knights Email | Always with uppercase “K”. When referring to the entire email system use Knights Email. |
| Leading Edge | Acronym is more commonly used. LEAP requests are often called tickets or |

| | |
|--|---|
| Administrative Project, LEAP | mods. |
| myUCF | Refers to the myUCF system. |
| myUCF portal | Lowercase “my” and capitalize “UCF.” Preferred is “myUCF portal”. Refers to the sign in page. |
| Network Identification, NID | Capitalize “NID” when using the acronym. |
| Network Services, NS | Use title case when referring to the team within UCF IT. Do not use NOC. |
| Organizational ID, OID | Common usage is by acronym. Capitalize “OID” when using the acronym. |
| PeopleSoft, PS | One word. Capitalize “PS” when abbreviating. |
| Personal Identification, PID | Capitalize “PID” when using as an acronym. Same as EmplID usually with the first letter of the person’s first name. |
| PS Tech | Capitalize “PS” and “T.” |
| ResNet | Capitalize “R” and “N.” |
| Student Perception of Instruction, SPI | Common usage is by acronym. Capitalize “SPI” when using as an acronym. Occasional referenced as “SPoI.” |
| UCF IT | Appropriate unit title. Two words. Capitalize “UCF IT” and use a space between words. Do not use italics; the wordmark is the only exception. |
| UCF IT Support Center | Appropriate service title. Do not use Help Desk, User Help Services, CS&T Help Desk, CS&T Service Desk. |
| UCF <i>on</i> iTunes U. | The word “on” is italicized. |
| ViewStar | One word. Capitalize “V” and “S.” |
| Webcourses@UCF, Webcourses@UCF Support | One word. Capitalize “W” and “UCF.” Include the “@” symbol. |

Vendor-specific Nomenclature

UCF IT interacts with and communicates about a wide variety of technologies. In order to avoid confusion, software, systems or other technology products need to use the vendor-specific naming. Table lists many of the common vendor-specific names encountered by UCF IT.

Table 6 Vendor-specific Words and Use Cases

| Word | Use |
|-----------------|--|
| Firefox | Capitalize “F”. All one word. |
| iPhone® | Lowercase “i” and capitalize “P.” Apple requires a Registered mark with each instance. ALT+0174 or [HTML] ® |
| iTunes U | See UCF on iTunes U. |
| Mac® | Abbreviation for Macintosh computer. Always in title case, registration mark used once per document. Do not use MAC. Apple requires a Registered mark with each instance. ALT+0174 or [HTML] ® |
| Mac Pro® | Two words. Capitalize “M” and “P.” Apple requires a Registered mark with each instance. ALT+0174 or [HTML] ® |
| MacBook® | One word. Uppercase “M” and capitalize “B.” Apple requires a Registered mark with each instance. ALT+0174 or [HTML] ® |
| MacBook Pro® | Two words. Capitalize “M,” “B,” and “P.” Apple requires a Registered mark with each instance. ALT+0174 or [HTML] ® |
| ServiceNow | One word. Capitalize the “S” and “N.” |
| SharePoint (SP) | Capitalize “S” and “P.” |
| Shibboleth | Capitalize “S.” |
| VMware | One word, Capitalized “VM.” |

Abbreviations and Acronyms

Table 7 Abbreviations and Acronyms and Uses

| Abbreviation | Refers to | Use |
|---------------------|------------------|------------|
|---------------------|------------------|------------|

| | | |
|------|--|--|
| BB | BlackBerry | Capitalize “BB.” |
| BES | BlackBerry Enterprise Server | Common usage is to refer to it by acronym (pronounced bez). |
| BIS | BlackBerry Internet Service | Common usage is to refer to it by acronym (pronounced biz). |
| CDL | Center for Distributed Learning | Common usage is to refer to it by acronym. Use Center for Distributed Learning in first instance, then CDL |
| COVE | Center for Online and Virtual Education | Part of the College of Engineering, assists engineering population. |
| CRM | Customer relationship management | |
| DARS | Degree Audit Reporting System | |
| db | database | Lowercase “db.” |
| FCTL | Faculty Center for Teaching and Learning | |
| FTP | File Transfer Protocol | |
| MAC | Media Access Control | Common usage is by acronym. |
| NIC | Network Interface Card | |
| NID | Network Identification | |
| OID | Organizational ID | |
| OIR | Office of Instructional Resources | Multimedia support for many classrooms. |
| POP | Post Office Protocol | Capitalize “POP.” POP3 is also common. |
| PROD | Production | |
| PS | PeopleSoft | |

| | | |
|------|-----------------------------------|--|
| RJ | Registered Jacks | As in RJ-11 or RJ-45 modular telephone jacks |
| SMTP | Simple Mail Transfer Protocol | |
| SNS | Student Notification System | |
| SPI | Student Perception of Instruction | Online professor evaluations |
| SSH | Secure Shell | |
| SSO | Single Sign On | |
| URL | Uniform Resource Locator | Also referred to as web addresses. |

3. Formatting

Keyboard Shortcuts and Combinations

Microsoft and Apple maintain keyboard shortcuts for their respective operating systems to produce actions as mouse alternatives. To maintain uniformity, UCF IT follows the formatting of the shortcuts as produced by Microsoft and Apple.

Microsoft shortcuts use a space between each intended key. The + symbol signifies an additional key combination. Example: Ctrl + C

Apple shortcuts do not use a space between each intended key. The - symbol signifies an additional key combination. Example: Command-C

Locations

For buildings, use the official numbers and abbreviations available at <http://map.ucf.edu/locations/> or <http://www.rm.fs.ucf.edu/crosswalk/>

For rooms, use the building abbreviation and room number and letters where applicable with no spacing. Examples: CSB329, TC1102C.

For wall RJ plates, use the room format, a hyphen, and then the jack number and letter. Example: TC1102B-4A

For cable television plates, use “CATV”, a hyphen, building number, a hyphen, and then the room number and letter where applicable. Example: CATV-129-101A

For CF tags, use “CF” and then number.

4. Article Formatting and Visual Layout

ServiceNow incorporates a WYSIWYG editor and recognizes HTML and CSS for KB articles. Articles should retain the same look and feel to provide users with consistency. They should also be legible and usable for all users, including those who may need assistive technology.

Headings

Use headings and sub-headings for specific steps or sections within an article. Headings should be black, bold text. Using sub-headings, levels 2-5, are preferred for the current ServiceNow user interface.

For HTML and CSS, use:

- h1: font-family: Arial; font-size: 24px; font-weight: bold; color: #000;
- h2: font-family: Arial; font-size: 22px; font-weight: bold; color: #000;
- h3: font-family: Arial; font-size: 18px; font-weight: bold; color: #000;
- h4: font-family: Arial; font-size: 16px; font-weight: bold; color: #000;
- h5: font-family: Arial; font-size: 14px; font-weight: bold; color: #000;

Paragraphs

Use paragraphs to organize sections of the article.

- For HTML and CSS, use: font-family: Arial; font-size: 14px; color: #000;

Images

Use the WYSIWYG editor to insert or attach an image. Images should have a maximum width of no more 600px unless absolutely required. All images must have text alternatives that describe the information they represent. The WYSIWYG editor supports adding alt text when adding an image. The alt text should be at least a short description conveying the essential information presented by the image. Avoid include “image of...” or “graphic of...” to describe the image unless it helps identify the origins of the image, such as a photograph or illustration. The alternative text should be a complete sentence.

For HTML and CSS, use the “full” class when the article needs full-size images.

Examples:

- ``
- ``

Links

All links should describe the action the user is about to take. Never use “click here.”

Examples:

- `Download Microsoft Office`
- `Learn more about VMware`

Lists

Use ordered lists for steps or procedures that are sequential. Use unordered lists for presenting options or items that have no sequential order.


Examples:

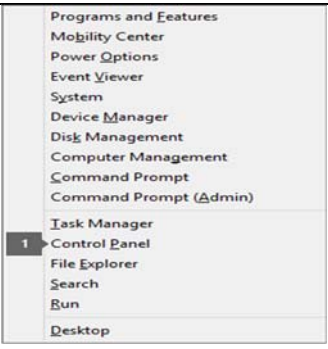
- Ordered List

```
<ol>
  <li>List Item - Step 1</li>
  <li>List Item - Step 2</li>
  <li>List Item - Step 3</li>
</ol>
```
- Unordered List

```
<ul>
  <li>List Item 1</li>
  <li>List Item 2</li>
  <li>List Item 3</li>
</ul>
```

Sample Snippet of a “How-to” Article

| | |
|---|--|
| <p>The following steps describe how to uninstall Office 2016 or 2013 products on a PC (laptop, desktop, or 2-in-1). To uninstall Office 2011 or 2016 for Mac, see the section <u>Uninstall Office on a Mac or older versions of Office</u>.</p> <p>1. Right-click the Start button  (lower-left corner), and choose Control Panel.</p> | <p>Introductory paragraph explaining the procedure and purpose of the article.</p> <p>Ordered list to start the process.</p> <p>Image that is part</p> |
|---|--|

| | |
|---|--|
|  <p>Option 3 – Uninstall Office Manually</p> <p>If the easy fix tool doesn't completely uninstall Office from your PC, you can manually uninstall Office. Select the version you want to uninstall.</p> | <p>of the list item.</p> <p>Sub-heading</p> <p>Paragraph</p> |
|---|--|

5. References

- “Keyboard shortcuts in Windows” <<https://support.microsoft.com/en-us/help/12445/windows-keyboard-shortcuts>>
- “Mac keyboard shortcuts” <<https://support.apple.com/en-us/HT201236>>
- “Guidelines for Using Apple Trademarks and Copyrights”<<https://www.apple.com/legal/intellectual-property/guidelinesfor3rdparties.html>>
- “Apple Trademark List” <<https://www.apple.com/legal/intellectual-property/trademark/appletmlist.html>>
- AP Stylebook <<https://www.apstylebook.com/>>
- Writing Style Guide <<https://www.ucf.edu/brand/brand-assets/writing-style-guide/>>

B. Article Checklist

Following the style guide is a very important part of the creating and editing process. Organizing the content, ideas, and formatting needs to be consistent across all published articles for knowledge management to be successful. The following checklist can help when reviewing an article for success.

Article Structure and Formatting

- Did the author use the appropriate layout and headings for the article type?
- Is the short description clear as to the purpose?
- Is the short description styled with title case?
- Is the content comprehensive?
- Are all major points associated with the topic covered or referenced?
- Does the content use the appropriate styles to maintain consistency?
- Can you incorporate an ordered or unordered list to make the article an easier read?
- Are the supporting images clear?
- Did they provide enough visual information?

Writing

- Is the grammar correct?
- Is spelling correct?
- Does the article stay on topic?
- Do the sections and paragraph transitions make sense and flow well?
- Does the introduction capture the reader's attention and explain exactly the purpose of the article?
- Does the article have concrete examples to help illustrate its message?

Diversity, Inclusion and Verification

- Can anything in the article be potentially harmful to any of our audience?
- Does the article use any insensitive or inappropriate terms?
- Does the article use any biased language?
- Were all the calculations, data points, configuration values or figures used in the article double-checked for accuracy?
- Does the content support our mission, philosophy and goals?
- Can the article build relationships across UCF departments?
- Did the author use any quotations or references? Did they credit the source and use the proper spelling of the source?

C. How-to Documents

The following sub-sections provide systematic instructions on how to use the ServiceNow environment and its features that support executing the policies and procedures of Knowledge Management.

1. Creating an Article

Creating an article can occur by closing an incident, creating a draft directly into ServiceNow's KB Article Form, importing a Word document or through a ServiceNow request item.

To create an article:

1. Before creating and importing a draft or moving an article through the KM workflow, check for duplicate knowledge articles by using ServiceNow's "Search for Duplicates" feature.

Using a Word Template and Import

2. Download and open the Style Template Word document from the KB0010642 "Knowledge Article Style Template" article.
3. After creating a draft article from the Style Template, import the article using the "Import Articles" button on the ServiceNow Knowledge Homepage.
4. Choose "UCF IT Internal" for the KB and select an appropriate category for the article as shown in Figure 3.

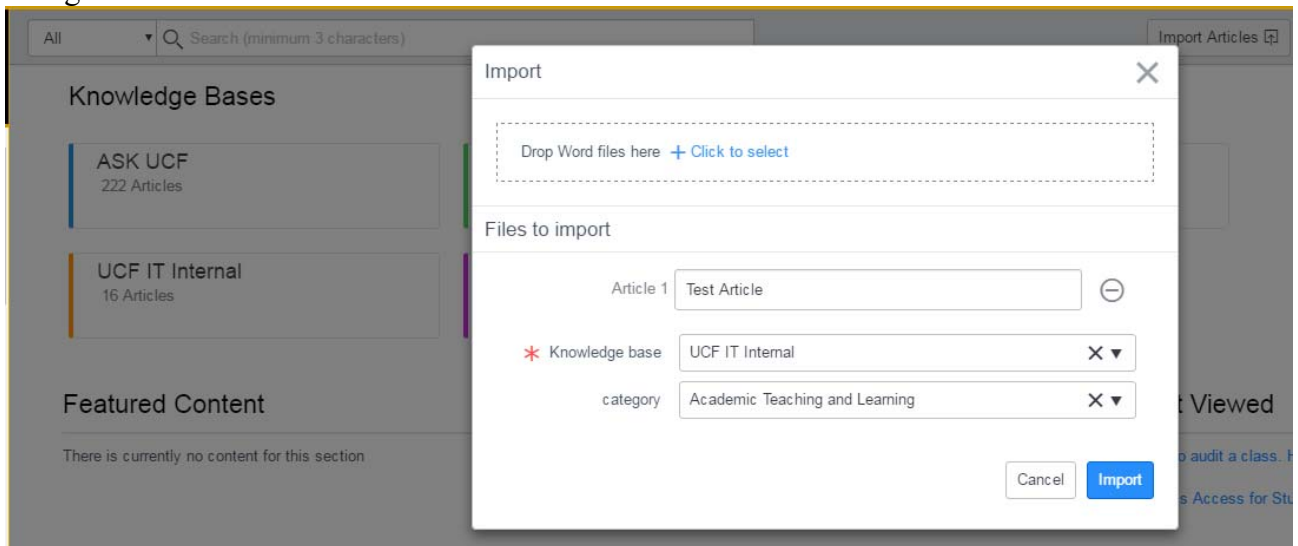


Figure 3 ServiceNow Import Articles Feature

5. After importing the article, you must submit for publication, starting the Publishing Lifecycle. Figure 4 demonstrates how to find the newly created draft to begin the review process through using ServiceNow "Unpublished" menu selection under Knowledge.

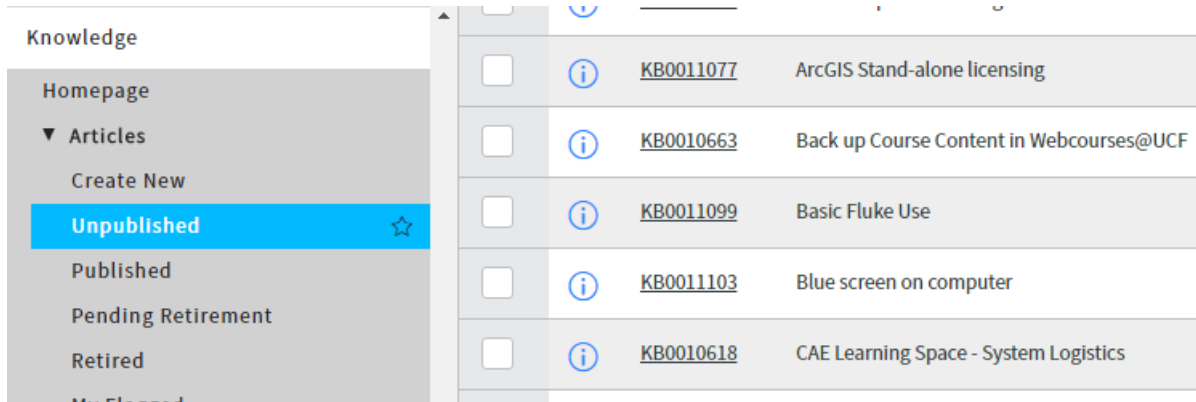
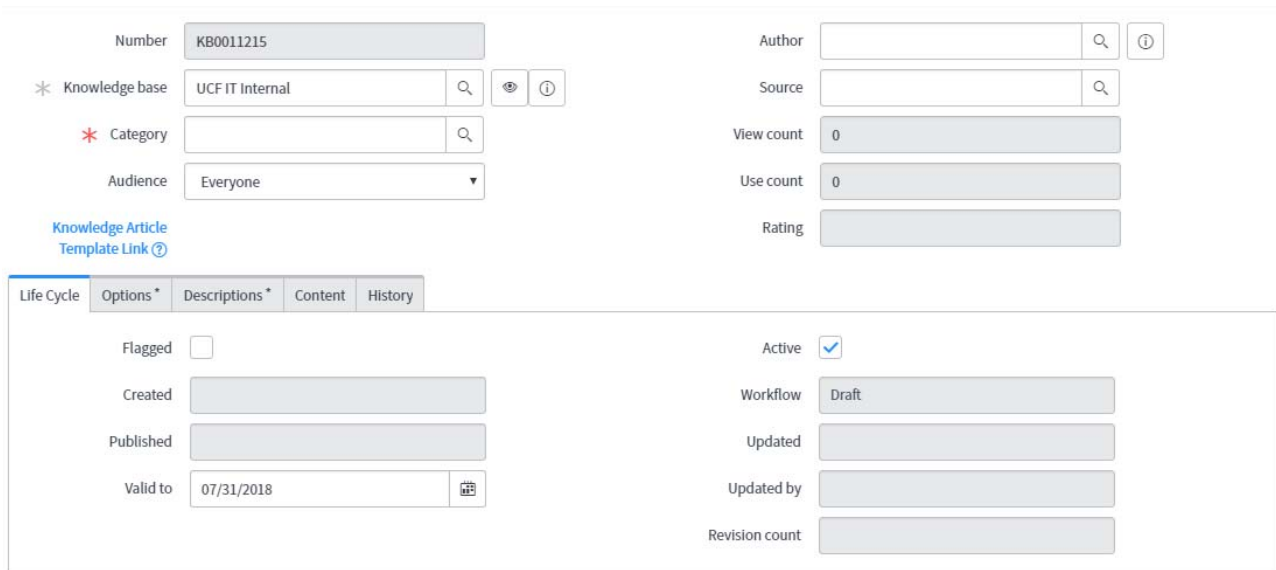


Figure 4 ServiceNow Unpublished KB Articles List

- Once the draft article has been located, click on the KB article number to navigate to the KB Article Form as seen in Figure 5.
- Submit for publication to complete the draft and start the Publishing Lifecycle.

Using the ServiceNow Article Form

- Select “Create New” menu item from the ServiceNow Knowledge menu.
- Type in or select values for the required fields. See the ServiceNow KB Article Form in the Informational Documents Appendix for more information about each field. Figure 5.
- Submit for publication to complete the draft and start the Publishing Lifecycle.



Number: KB0011215

Knowledge base: UCF IT Internal

Category: [Empty]

Audience: Everyone

Author: [Empty]

Source: [Empty]

View count: 0

Use count: 0

Rating: [Empty]

Life Cycle: Options* | Descriptions* | Content | History

Flagged:

Created: [Empty]

Published: [Empty]

Valid to: 07/31/2018

Active:

Workflow: Draft

Updated: [Empty]

Updated by: [Empty]

Revision count: [Empty]

Figure 5 ServiceNow Knowledge Base Article Form with “Tabbed Forms” Enabled

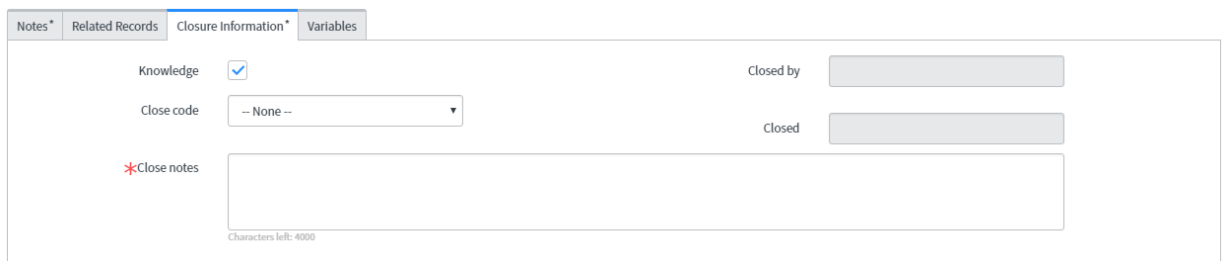
Articles created from a closed incident or a Web request form move to a draft state, which requires completion before the Publishing Lifecycle starts. See “Creating an Article from an Incident,” “Creating an Article from the ServiceNow Web Request,” “Publishing an Article” and “Editing an Article” in the How-to Documents Appendix.

2. Creating an Article from an Incident

Creating a KB article from closing an incident provides a potential reference for future similar incidents. All incidents need to have an attached KB article or have its resolution offered as a KB article.

To create an article when closing an incident:

1. Select the “Knowledge” check box in the “Closure Information” section of an Incident as seen in Figure 6.



The screenshot shows the 'Closure Information' section of a ServiceNow incident form. It includes a 'Knowledge' checkbox which is checked, a 'Close code' dropdown menu currently showing '-- None --', and a 'Closed by' field. Below these is a large text area for '*Close notes' with a character count of 4000. The 'Closed' field is also visible.

Figure 6 ServiceNow Incident Form Closure Information Section with "Tabbed Forms" Enabled

2. Type detailed close notes as the rough draft to the KB article and follow the incident closing process.

The result of this action will be an unpublished article in draft state, which requires completion before the Publishing Lifecycle starts. See “Creating an Article,” “Publishing an Article” and “Editing an Article” in the How-to Documents Appendix.

3. Creating an Article from the ServiceNow Web Request

When someone submits a potential KB article from the ServiceNow Request form, the article enters an unpublished incomplete draft state, which requires completion before the Publishing Lifecycle starts.

See “ServiceNow KB Article Form” in the How-to Documents Appendix, the Article Checklist and the Article Style Guide.

4. Publishing an Article

Once an author saves a draft article, the author must publish the article to complete the draft state and initiate the next stage of the Publishing Lifecycle. Figure 7 demonstrates how the SN workflow indicates a completed draft as opposed to a draft in progress as shown from the “Unpublished” page listing. An article stays unpublished until the final stage of the Publishing Lifecycle.

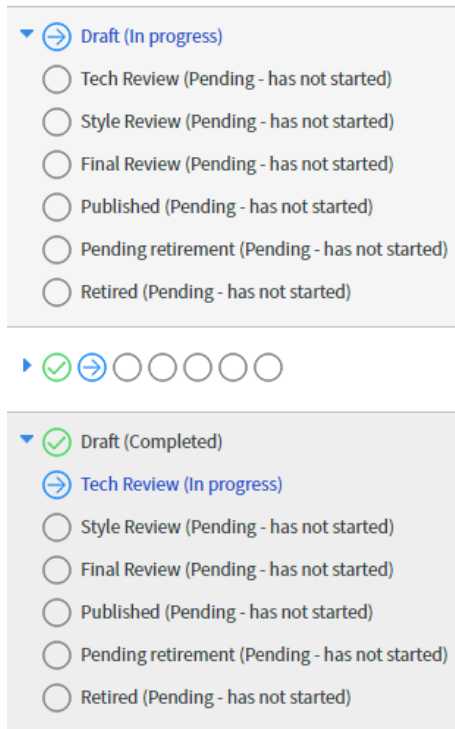


Figure 7 ServiceNow KB Unpublished Article List Workflow Showing an In-progress Draft and a Completed Draft

To submit an article for publishing:

1. From the SN Knowledge menu, select “Unpublished” to navigate to a list of unpublished draft articles as seen in Figure 4.
2. Click the draft article number to navigate to the SN KB Article Form.
3. Click the “Publish” button.

The result of this action will be an article ready for technical review, which starts the next stage of the Publishing Lifecycle. See “Editing an Article” and “Technical-Reviewing an Article” in the How-to Documents Appendix.

5. Editing an Article

While editing a KB article prior to submitting for publishing is recommended, editing an article can occur during any state or stage of the Publishing Lifecycle including a published article, an in-progress draft, or an article in the Retirement Lifecycle. Editing will also occur during the technical review, style review, and final review stages by the Content Owners, Style Editors, and Knowledge Managers. Rejection of an article can also require additional editing to update or improve the content.

To edit or update a KB article:

1. In SN, select the “Published” or “Unpublished” option from SN’s Knowledge menu.
2. Locate the KB article to edit.
3. Click the KB article number to navigate to the SN KB Article Form.
4. Edit the fields as needed.
5. Click the “Save” or “Update” button.

The result of this action does not advance an article to another stage of the Publishing Lifecycle and it does not produce any notifications. The activity log for the article will capture any changes. See “Creating an Article,” “Publishing an Article,” “Technical-Reviewing an Article” and “Style-Reviewing an Article” from the How-to Documents Appendix and the ServiceNow KB Article Form in the Informational Documents Appendix.

6. Technical-Reviewing an Article

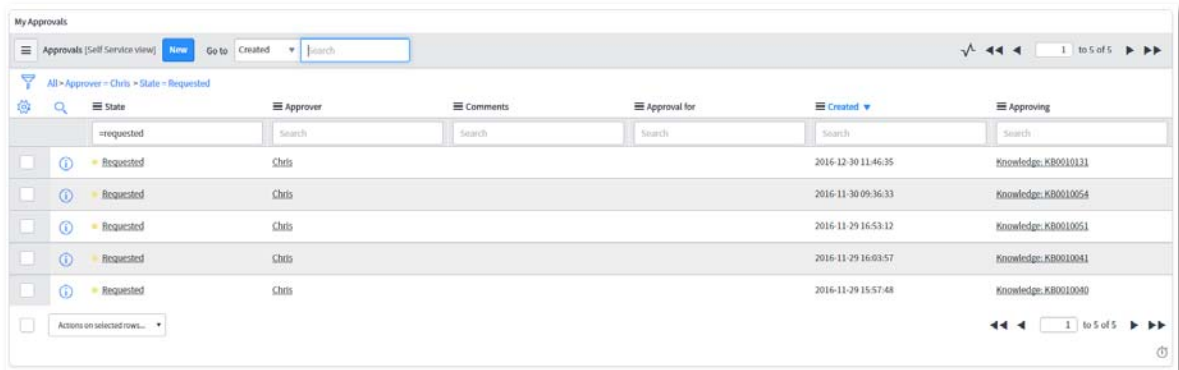
As part of the Publishing Lifecycle, technical review occurs on completed draft articles. A technical reviewer or content owner reviews the article for technical accuracy, relevance and merit, and they edit articles as necessary. The technical review helps ensure that the articles that will reliably resolve the problems the author intended the article to solve and provide the information that empowers individuals to complete common IT-related tasks without directly involving UCF IT.

Technical reviewers receive email and Web notification when articles submitted for publication are ready for review.

To locate articles requiring review and approval:

Using “My Approvals”

1. From the SN Self-Service menu, select the “My Approvals” to navigate to a list of approvals.
2. Locate the KB article review and approval request as shown in Figure 8.



| State | Approver | Comments | Approval for | Created | Approving |
|-----------|----------|----------|--------------|---------------------|----------------------|
| Requested | Chris | | | 2016-12-30 11:46:35 | Knowledge: KB0010131 |
| Requested | Chris | | | 2016-11-30 09:36:33 | Knowledge: KB0010054 |
| Requested | Chris | | | 2016-11-29 16:53:12 | Knowledge: KB0010051 |
| Requested | Chris | | | 2016-11-29 16:03:57 | Knowledge: KB0010041 |
| Requested | Chris | | | 2016-11-29 15:57:48 | Knowledge: KB0010040 |

Figure 8 ServiceNow My Approvals List with Personalized Column, Approving, Added

3. Click the request appropriate “Requested” state to navigate to the SN KB approval form.

Using the SN KB Article Form

1. From the SN Knowledge menu, select “Unpublished” to navigate to a list of unpublished draft articles as seen in Figure 4.
2. Locate the KB article to edit.
3. Click the KB article number to navigate to the SN KB Article Form.
4. Navigate to “Approvals” section.
5. Click the request appropriate “Requested” state to navigate to the SN KB approval form.

Technical Review Checklist

- Check for duplicate articles that have similar topics or contain overlapping details. Consider adding the content to the published article by contacting a KB Category Content Owner.
- Check the article category and sub-category to ensure the article is appropriately categorized. Reject article, noting the appropriate category.
- Determine if the article needs any corrections to any technical information, including but not limited to domain names, IP addresses, ports, commands, process, use of slashes, steps, and other details. Edit or reject and comment the article appropriately.
- Perform the Article Checklist. Edit or reject and comment the article appropriately.

To approve, reject or add a comment to a KB Article Approval:

1. From the SN KB approval form, add comments, edit the article, and change the approval state as needed as shown in Figure 9.

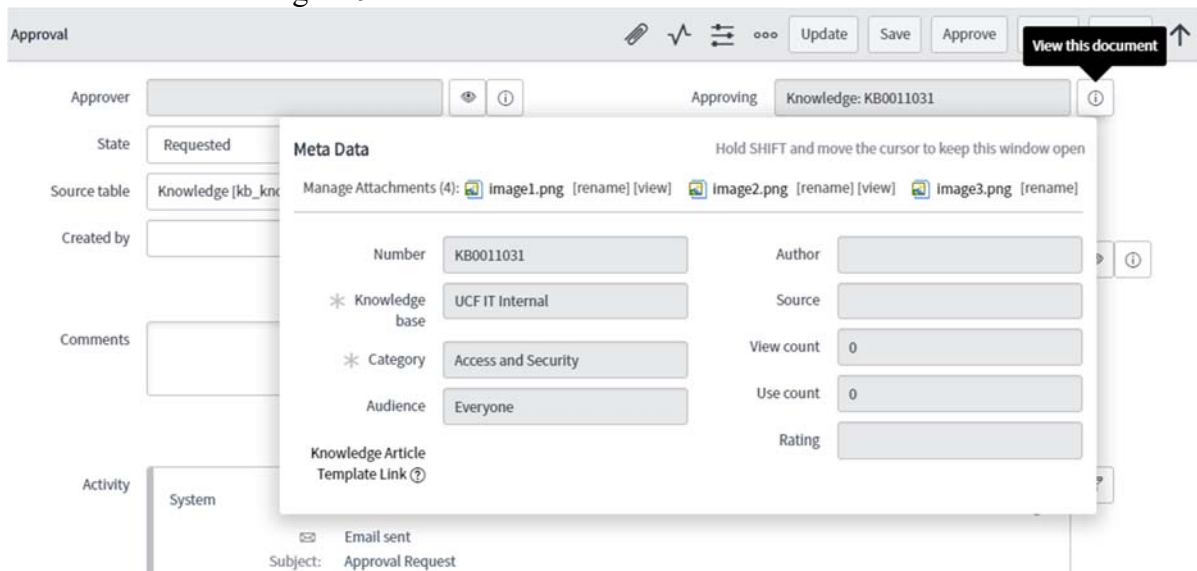


Figure 9 ServiceNow Approval Form for a Knowledge Article

2. Click the “Save” or “Update” button.

TIPS:

- Personalizing the “My Approvals” list to include the column “Approving” provides additional information on what needs approval as shown in Figure 8.
- Rejecting an approval request requires a comment that explains the details on why rejection occurred.

The result of this action can advance an article to another stage of the Publishing Lifecycle. Approving the technical review will advance the article to the next stage, and rejecting the article will return the article to a completed draft state. The activity log for the article will capture any edits or comments. See

the Article Style Guide, the Article Checklist, “Editing an Article” from the How-to Documents Appendix, and the ServiceNow KB Article Form and the ServiceNow KB Article Approval Form in the Informational Documents Appendix.

7. Style-Reviewing an Article

As part of the Publishing Lifecycle, style review occurs on approved, technically reviewed articles. A Style Editor reviews articles for consistency of language, grammar, voice, tone, formatting, and appropriateness of the style's content based on the Article Style Guide. Style Editors edit articles as necessary. Style Editors take the audience the article is intended to serve as a critical consideration as part of the review to help comprehension and clarity.

Style reviewers receive email and Web notification when technically reviewed articles receive approval.

The procedures to locate, approve, reject or add a comment to articles ready for style review are the same as for technical reviewing.

Style Review Checklist

- Check for duplicate articles that have similar topics or contain overlapping details. Consider adding the content to the published article by contacting a KB Category Content Owner.
- Check the article category and sub-category to ensure the article is appropriately categorized. Change article category and sub-category appropriately.
- Determine if the article needs any changes to style, including but not limited to spelling, grammar, tone, point of view, consistency of language and formatting and other details. Edit or reject and comment the article appropriately based on the Article Style Guide.
- Perform the Article Checklist. Edit or reject and comment the article appropriately.

The result of this action can advance an article to another stage of the Publishing Lifecycle. Approving the style review will advance the article to the next stage, and rejecting the article will return the article to a completed draft state. The activity log for the article will capture any edits or comments. See the Article Style Guide, the Article Checklist, "Editing an Article" and "Technical-Reviewing an Article" from the How-to Documents Appendix, and the ServiceNow KB Article Form and the ServiceNow KB Article Approval Form in the Informational Documents Appendix.

8. Final-Reviewing an Article

As the final stage of the Publishing Lifecycle, the final review occurs on approved, style-reviewed articles. Knowledge Managers perform an additional technical and style review of an article and ensure the article category and contents align for the category and complement other articles to add to a comprehensive KB.

Final reviewers receive email and Web notification when technically reviewed articles receive approval.

The procedures to locate, approve, reject or add a comment to articles ready for final review are the same as for technical and style reviewing.

Final Review Checklist

- Check for duplicate articles that have similar topics or contain overlapping details. Consider adding the content to the published article by contacting a KB Category Content Owner.
- Check the article category and sub-category to ensure the article is appropriately categorized. Consider the need for sub-category changes. Change article category and sub-category appropriately.
- Review the technical information. Edit or reject and comment the article appropriately.
- Review the article style. Edit or reject and comment the article appropriately based on the Article Style Guide.
- Perform the Article Checklist. Edit or reject and comment the article appropriately.

The result of this action can publish the article or move it to another stage of the Publishing Lifecycle. Approving the final review will publish the article, and rejecting the article will return the article to a completed draft state. The activity log for the article will capture any edits or comments. See the Article Style Guide, the Article Checklist, “Editing an Article” and “Technical-Reviewing an Article” from the How-to Documents Appendix, and the ServiceNow KB Article Form and the ServiceNow KB Article Approval Form in the Informational Documents Appendix.

9. Retiring an Article

Retiring an article is part of the Retirement Lifecycle for published KB articles. Knowledge Managers retire articles and communicates an article that is pending retirement. Knowledge Managers and Content Owners can edit and update articles pending retirement to avoid retirement.

Knowledge Managers receive email and Web notification when articles enter the retirement pending state.

Pending Retirement and Retirement Checklist

- Consider the age, accuracy, redundancy, working links, quality and helpfulness in terms of views, comments, rating and relevance. Edit the article and update the “valid-to” date or start retirement.
- Communicate with the Content Owner or author on retirement considerations. Edit the article and reject or approve for retirement.
- Prior to approving for retirement, communicate with those who may be impacted: trainers, support teams, and service owners.
- Attempt to identify any Web or documents that reference the KB article, and communicate with the sources of the referencing material.
- Determine the reason for retirement, including but not limited to product no longer exists, process change, or some other reason. Prepare the article to indicate reason and include a reference to a superseding KB article if applicable.

To start the retirement of an article:

1. From the SN Knowledge menu, select “Published” to navigate to a list of published articles as seen in Figure 10.

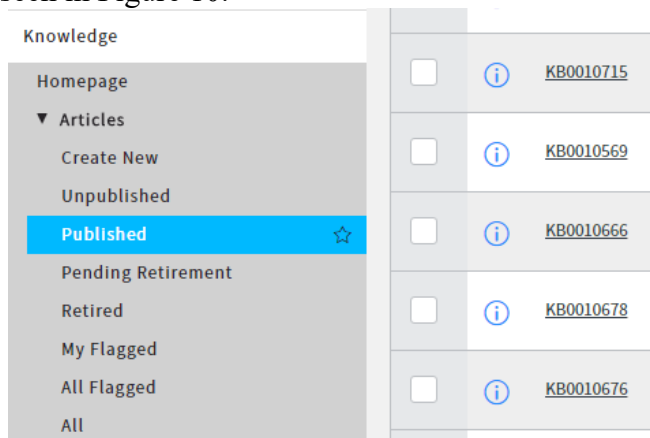


Figure 10 ServiceNow Published KB Articles List

2. Click the article number to navigate to the SN KB Article Form.

3. Click the “Retire” button.

To prepare an article for retirement:

1. From the SN Knowledge menu, select “Pending Retirement” to navigate to a list of articles pending retirement as seen in Figure 11.

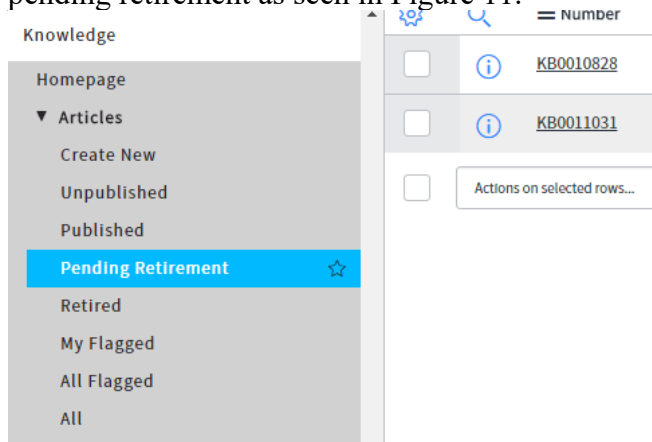


Figure 11 ServiceNow KB Pending Retirement List

2. Click the article number to navigate to the SN KB Article Form.
3. Edit the content of the article by inserting a heading to the beginning with “Retired” followed by the reason for retirement. Example: “Retired: Software no longer supported.” “Retired: KB332211 replaces this article.”
4. Edit the short description of the article by inserting “RETIRED:” in the beginning of the existing short description.
5. Click the “Save” or “Update” button.

The result of these actions can retire an article or move it back to a published state. Approving the pending retirement will retire the article, and rejecting the request will send article will return the article to a published state. The activity log for the article will capture any edits or comments. See the Article Style Guide, the Article Checklist, “Editing an Article,” “Technical-Reviewing an Article” and “Style-Reviewing an Article” from the How-to Documents Appendix, and the ServiceNow KB Article Form and the ServiceNow KB Article Approval Form in the Informational Documents Appendix.

10. Flagging Articles

You can flag an article for incorrect or inappropriate content. Suggestions you make when flagging an article do not appear in the public comments for that article.

To flag an article:

1. Click the “Flag article” button in the article header to open a new window, allowing you to enter suggested changes as seen in Figure 12.

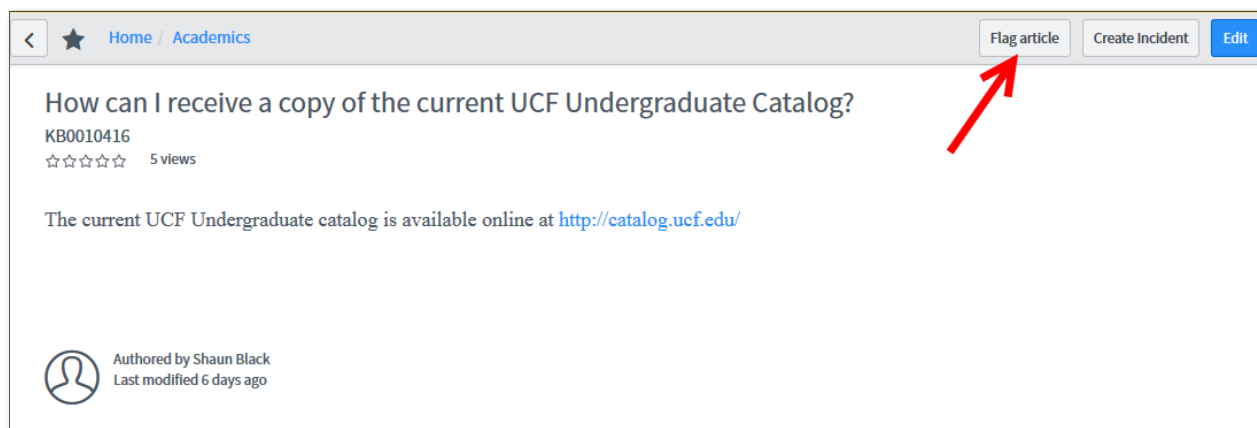


Figure 12 ServiceNow KB Article View

11. Rating an Article

The five stars below the article title allow you to indicate the article's effectiveness on a scale of 1 to 5 as shown in Figure 13. Rating articles helps in retirement consideration of the Retirement Lifecycle.

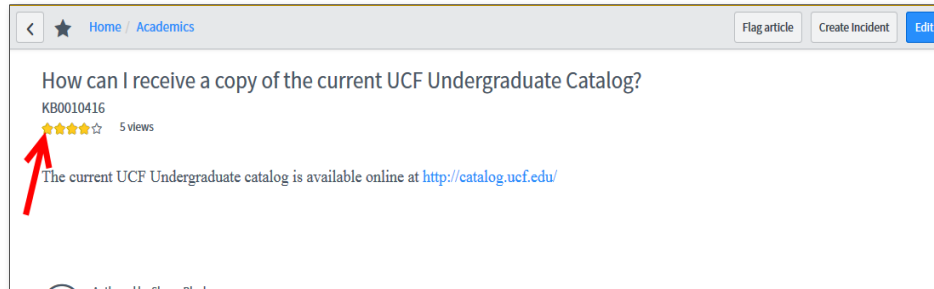
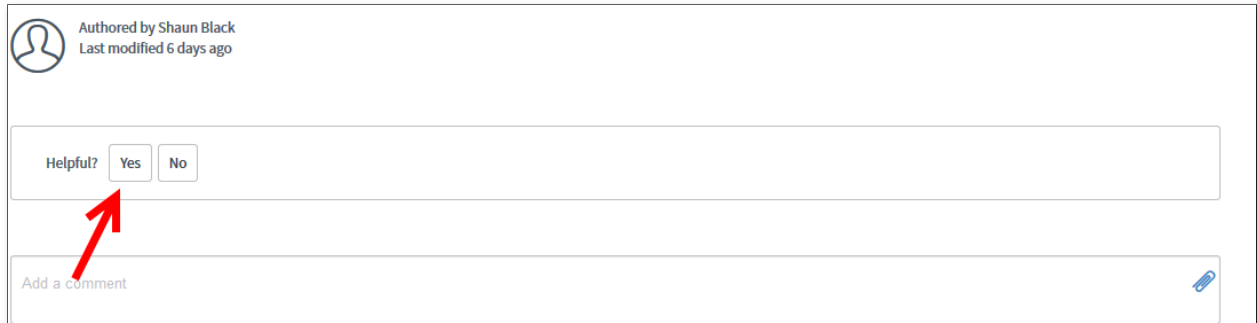


Figure 13 ServiceNow KB Article View with Star Rating

12. Marking an Article

Articles present the question “Helpful?” at the bottom to collect the usefulness of the article with a “Yes” or “No” as shown in Figure 14. Marking articles helps in retirement consideration of the Retirement Lifecycle.



The screenshot shows a user interface for a Knowledge Base (KB) article. At the top left, there is a profile icon and the text "Authored by Shaun Black" and "Last modified 6 days ago". Below this, there is a section labeled "Helpful?" with two buttons: "Yes" and "No". A red arrow points to the "Yes" button. Below the "Helpful?" section, there is a text input field with the placeholder text "Add a comment" and a blue paperclip icon on the right side.

Figure 14 ServiceNow KB Article View with Helpful buttons

13. Using Comments

Knowledge comments at the bottom of the article use document live feed to enable a conversation around a knowledge article, such as posting replies to comments, adding attachments or liking comments as shown in Figure 15.

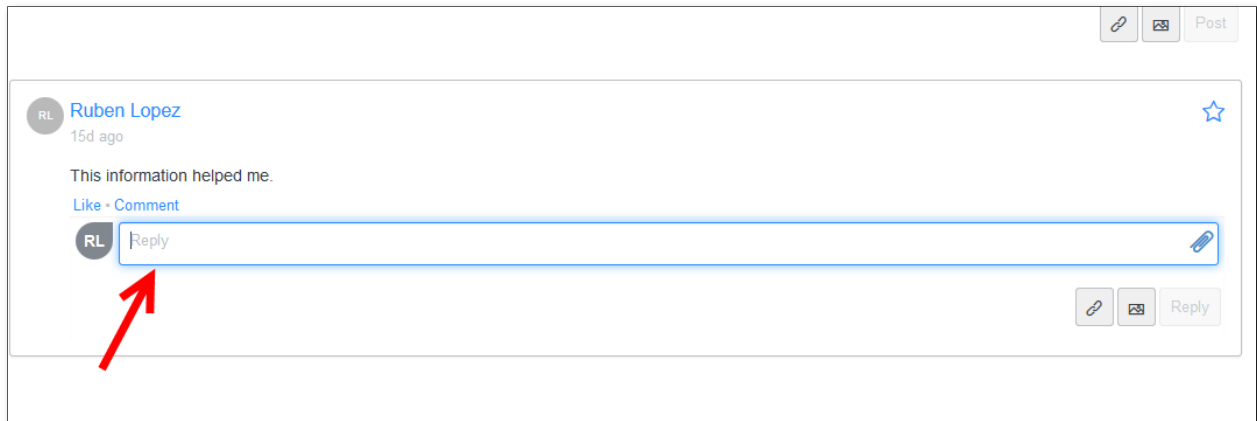


Figure 15 ServiceNow KB Article View with Comments

14. Pinning an Article

Pinned articles appear at the top of knowledge search results and in the “Featured Content” section of the knowledge homepage as shown in Figure 17. Pinning associates an article to specific keywords. Searching for a keyword causes articles with that keyword to appear at the top of search results. By default, only articles with the keyword “homepage” appear in the “Featured Content” section.

To pin an article:

1. Navigate to “Knowledge Bases” menu option from the ServiceNow’s Knowledge menu as shown in

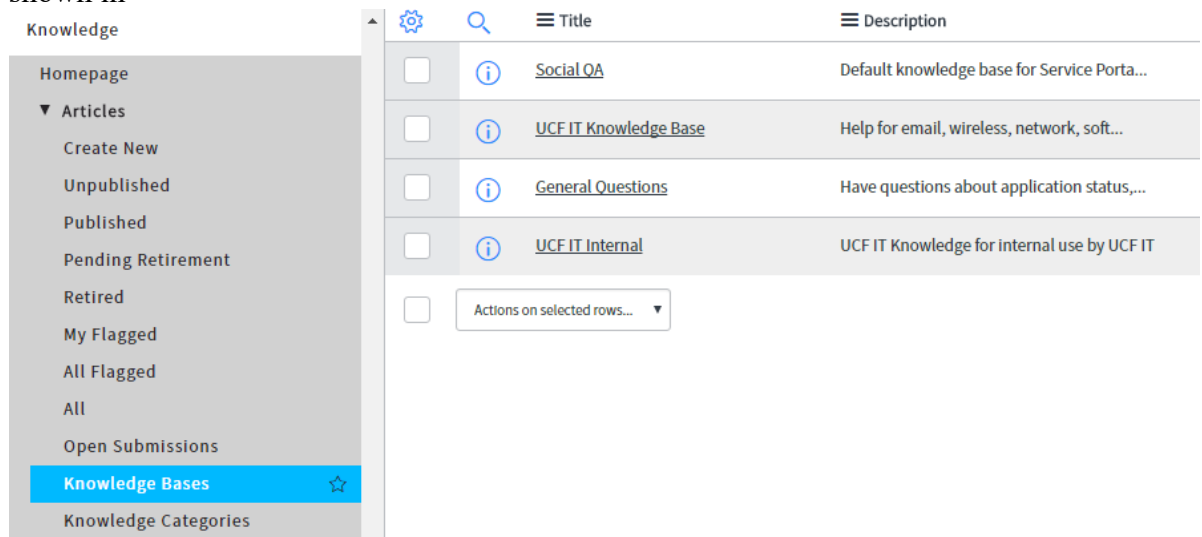


Figure 16 ServiceNow KB Knowledge Bases List

2. Click the title of the KB to navigate to the KB form.
3. From the “Featured Content” section, click “new.”
4. Search for the KB article to feature.
5. Click the “lock” icon to expand the keywords field.
6. Select keywords using the reference lookup icon or type keywords.
7. Click the “Submit” button when finished.

Knowledge Bases

General Questions
198 Articles

Social QA
1 Questions and 0 Articles

UCF IT Internal
32 Articles

UCF IT Knowledge Base
146 Articles

Featured Content

There is currently no content for this section

Most Useful

[UCF Qualtrics Overview](#)
[How do I enroll with Multi-factor Authentication - Mobile Phone](#)

Most Viewed

[OneDrive for Business Frequently Asked Questions](#)
[How do I reset my NID Password?](#)
[Getting Started with Multi-Factor Authentication](#)
[NID Account Locked](#)
[How do I change or reset an OID password?](#)

Figure 17 ServiceNow KB Homepage with no Pinned or Featured Content

15. Requesting a new Knowledge Base Category or Sub-category

A category classifies an article and serves as a basis for organizing services and technologies supporting the services. Selecting the appropriate category is important to the Publishing Lifecycle. Each category and sub-category has at least one Content Owner.

The Category Picker lists available categories and sub-categories when creating new articles as shown in Figure 18.

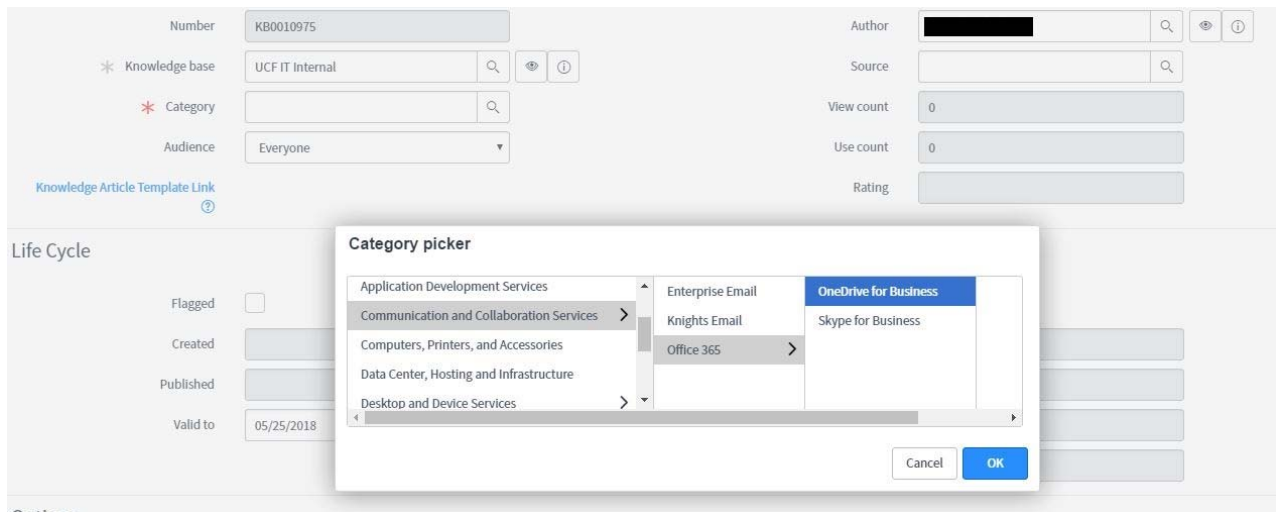


Figure 18 ServiceNow KB Categories and Sub-categories

When the existing categories and sub-category do not suit a KB article or series of articles, new categories can be added to accommodate a new service or technology.

To request a new category:

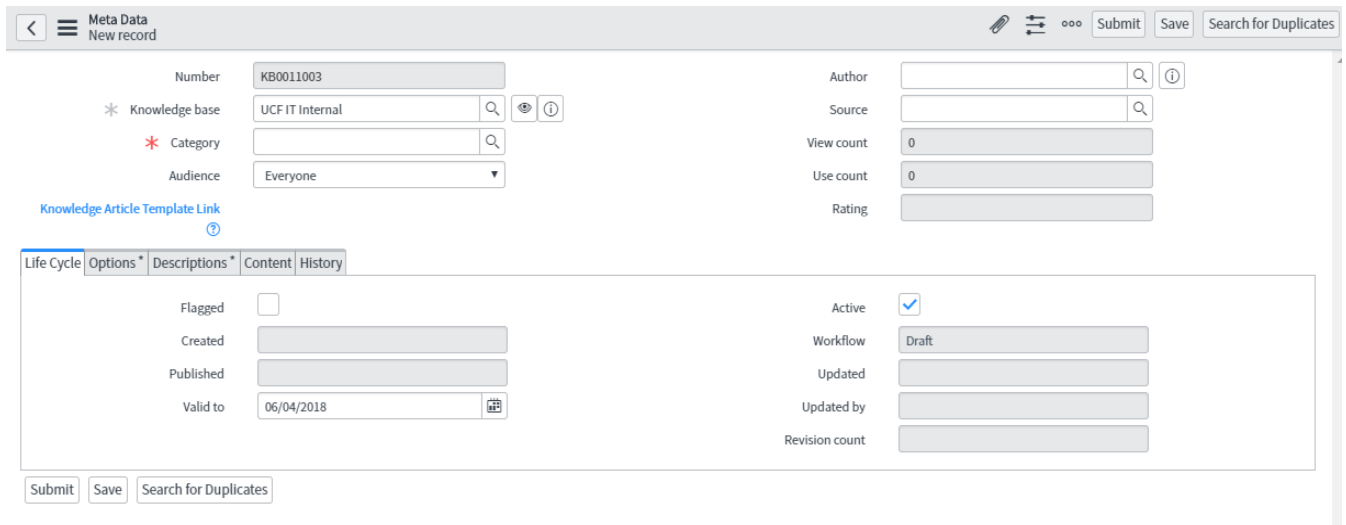
1. Select the “Other and unclassified” category
2. Communicate the proposed category and sub-categories, if applicable, with a reason for the need to a Knowledge Manager.
3. Based on the outcome, select the new category or the recommended existing category.

D. Informational Documents

The ITSM Application, ServiceNow, mainly uses two forms, the ServiceNow KB Article Form and the ServiceNow KB Article Approval Form to manage the Lifecycle Workflows.

1. ServiceNow KB Article Form

The ServiceNow KB Article Form is the main entry point for creating, reviewing, and editing a KB article. Figure 19 shows some of the form and its buttons and fields with the SN “tabbed forms” feature enabled. When the “tabbed forms” feature is disabled, each tab presents as a section, lengthening the page, in the same order as the tabs.



The screenshot shows the ServiceNow KB Article Form interface. At the top, there is a header bar with a back arrow, a menu icon, and the text "Meta Data New record". On the right side of the header, there are icons for edit, list, and search, along with buttons for "Submit", "Save", and "Search for Duplicates".

The main form area contains several input fields and dropdown menus:

- Number:** KB0011003
- Knowledge base:** UCF IT Internal
- Category:** (empty)
- Audience:** Everyone
- Author:** (empty)
- Source:** (empty)
- View count:** 0
- Use count:** 0
- Rating:** (empty)

Below these fields is a "Knowledge Article Template Link" section with a plus icon. The main content area is divided into tabs: "Life Cycle", "Options*", "Descriptions*", "Content", and "History". The "Options*" tab is currently selected and contains the following fields:

- Flagged:**
- Created:** (empty)
- Published:** (empty)
- Valid to:** 06/04/2018
- Active:**
- Workflow:** Draft
- Updated:** (empty)
- Updated by:** (empty)
- Revision count:** (empty)

At the bottom of the form, there are buttons for "Submit", "Save", and "Search for Duplicates".

Figure 19 ServiceNow KB Article Form

Header and Footer

The header and footer of the form contain buttons and icons that perform the major actions and functions on a KB article depending on its state. Figure 20 demonstrates the typical buttons and icons available in the header.



The screenshot shows the header of the ServiceNow KB Article Form. It includes a back arrow, a menu icon, and the text "Meta Data KB0010769". On the right side, there are icons for edit, show, list, and search, along with buttons for "Save", "Publish", "Retire", "Update", and "Search for Duplicates". There are also up and down arrow icons at the far right.

Figure 20 ServiceNow KB Article Form Header with Save, Publish, Retire, Update, and Search for Duplicates Buttons

Table 8 explains the function or action each button or icon provides.

Table 8 ServiceNow KB Article Form Footer and Header Icons and Buttons and Actions

| Button or Icon | Action |
|--|---|
|  Manage Attachments | Manages removing and adding files to a KB article |
|  Show | Navigates to the activity related to the article; any changes to the article are logged |



| | |
|--|--|
| Activity Stream | here |
|  Personalize Form | Offers the ability to toggle on and off fields on the form. Default fields are recommended |
|  More Options | Offers the ability to toggle the template bar and annotations on and off, and the ability to add a tag to an article. |
| Submit | Located in the header and footer, clicking will save an article into an incomplete or in-progress draft state for future completion and publishing. |
| Publish | Located in the header and footer, clicking will complete the in-progress draft article, and start the next stage of the Publishing Lifecycle. |
| Retire | Located in the header and footer, clicking will start the Retirement Lifecycle for an article. See “Retiring an Article” in the How-to Documents Appendix. |
| Save | Located in the header and footer, clicking will save an article in its current state. |
| Update | Located in the header and footer, clicking will save an article in its current state and SN will navigate to the previous page that SN rendered. |
| Search for Duplicates | Located in the header and footer. Clicking provides a method to search the KB for duplicate articles. Using this feature first is highly recommended. |

Figure 21 demonstrates the typical buttons available in the footer.



Figure 21 ServiceNow KB Article Form Footer with Save, Publish, Retire, Update, and Search for Duplicates Buttons

Sections and Fields

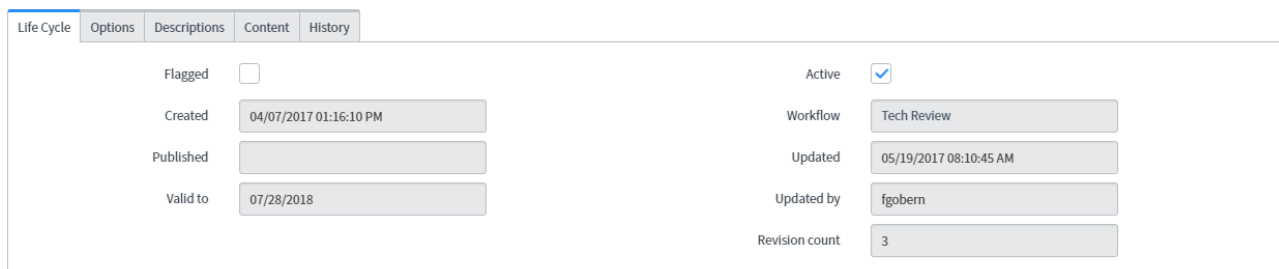
The sections and fields make up the anatomy, categorization and life of a KB article. Table 9 shows the general fields of a KB article and describes their use.

Table 9 ServiceNow KB Article Fields

| Field | Description |
|--------|--|
| Number | This field automatically populates with a unique ID number. Only a SN administrator can change the number. This number displays when viewing a published KB article. |

| | |
|----------------|---|
| Knowledge Base | This field determines what Knowledge Base the article resides. The “UCF IT Internal” KB, which is not visible to clients, is the default KB value. This field displays when viewing a published KB article. |
| Category | This field determines the category and sub-category the articles resides within a specific KB. This field displays when viewing a published KB article. |
| Audience | This field indicates the intended reader or beneficiary of the article. This field displays when viewing a published KB article. |
| Author | This field automatically populates with the creator of the article when the article was created from an incident or through planned knowledge. |
| Source | This field provides a method to create a single related reference to an incident or request within SN. This field may be blank depending on how the creation of the article occurred. |
| View Count | This read-only field automatically tracks how many times an article has been viewed. Its value is part of the retirement consideration procedure. |
| Use Count | This read-only field automatically tracks how many times an article has been used to resolve an incident. Its value is part of the retirement consideration procedure. |
| Rating | This read-only field automatically tracks how helpful an article was to some viewing it; the rating system uses a 5-star system with a value range from 1-5. |

Figure 22 shows the fields related to the lifecycle of a KB article with the SN “tabbed forms” feature enabled.



| Field | Value |
|----------------|-------------------------------------|
| Flagged | <input type="checkbox"/> |
| Active | <input checked="" type="checkbox"/> |
| Created | 04/07/2017 01:16:10 PM |
| Workflow | Tech Review |
| Published | |
| Updated | 05/19/2017 08:10:45 AM |
| Valid to | 07/28/2018 |
| Updated by | fgobern |
| Revision count | 3 |

Figure 22 ServiceNow KB Article Form Lifecycle Section and Related Fields

Table 10 shows the life cycle fields of a KB article and describes their use.

Table 10 ServiceNow Lifecycle Section Fields and Descriptions

| Field | Description |
|----------------|---|
| Flagged | This check box offers a method to call attention to an article when revising or retiring could be in order. Newly created articles should not have this checked. Contact a Knowledge Manager for advice on the “Flagged” check box. |
| Created | This field allows for the selection of the creation date for an article. This field automatically populates with today’s date. |
| Published | This field automatically populates to the created date selected when the article reaches a published state. |
| Valid to | This field automatically populates to one year after created date selected. |
| Active | This check box automatically is checked. A draft article must be active to display once it is in a published state. Leave this field as active. |
| Workflow | This field automatically indicates the stage an article currently resides in the Publishing Lifecycle. |
| Updated | This field automatically displays the date when an article received its last edit. |
| Updated By | This field automatically displays the last person to update the article. |
| Revision Count | This field automatically indicates how many revisions an article has received. |

Figure 23 shows the fields related to the options of a KB article with the SN “tabbed forms” feature enabled.



The screenshot shows the 'Options' tab of a ServiceNow KB article form. The tab is highlighted in blue. Below the tab are several fields:

- Attachment link
- Display attachments
- Meta (Keywords)
- Disable commenting
- Disable suggesting

Figure 23 ServiceNow KB Article Form Options Section and Related Fields

Table 11 shows the options fields of a KB article and describes their use.

Table 11 ServiceNow Options Section Fields and Descriptions

| Field | Description |
|---------------------|---|
| Attachment Link | When enabled, this field will change SN behavior. With this field enabled, any files attached to the KB article will open instead of the normal article view. |
| Display attachments | When enabled, this field will display any file attachments associated with the KB article to display with the article body. In general, most articles will not have any attachments needed by the client. |
| Meta (keywords) | Keywords entered in this text box are comma separated values and help determine where results show when searching through a SN search field. Stacking, using the same keyword multiple times, promotes the placement of the article when searching through a SN search field. |
| Disable Commenting | Clicking this check box will disallow users from commenting on an article. At this time, public-facing articles should always have this checked on. |
| Disable Suggesting | Clicking this check box will disallow users from suggesting helpful knowledge articles. At this time, public-facing articles should always have this checked on. |

Figure 24 shows the fields related to the description of a KB article with the SN “tabbed forms” feature enabled.



Figure 24 ServiceNow KB Article Form Descriptions Section and Related Fields

Table 12 shows the options fields of a KB article and describes their use.

Table 12 ServiceNow KB Article Form Descriptions and Field Descriptions

| Field | Description |
|---------------------------|--|
| Short Description (Title) | The short description of an article is the title of the article. This field is part of the search fields used for searching, along with the meta field. |
| Internal Description | This text box offers a place to include all information to facilitate categorizing and providing intent of a KB article, including audience, public-facing or internal, category, and what the author, technical or style reviewer hopes to achieve. |

Figure 25 shows the field related to the content of a KB article with the SN “tabbed forms” feature enabled.

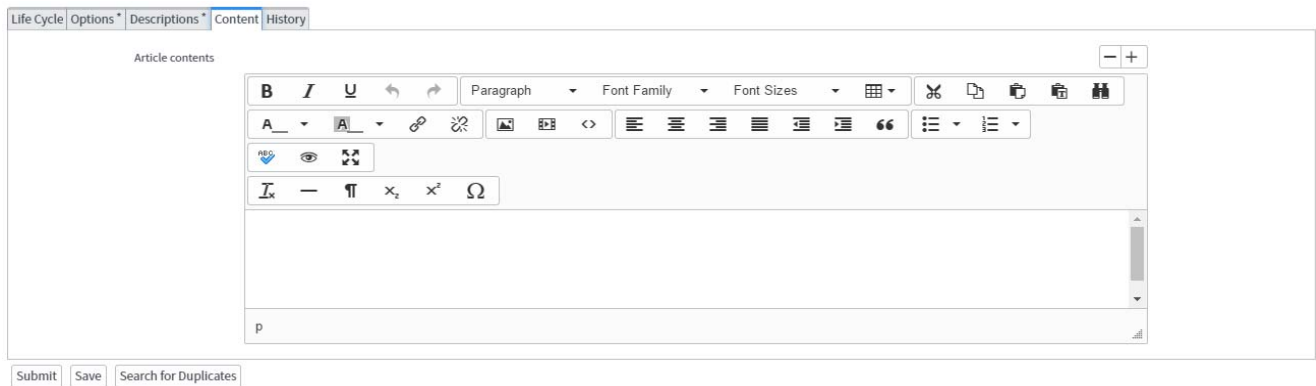


Figure 25 ServiceNow KB Article Form Content Section and Related Field

The content section contains the one text box field that includes tools for editing and styling text, adding formulas and embedding media. The WYSIWYG editor offers many of the same tools as Microsoft Word as well as the ability to see the source, HTML, in order to make specific changes.

History

The history section contains a log or stream of all the activity recorded for the article, including approvals, rejections, changing in content, valid dates, category changes, and changes in workflow.

Related Links

The related links section contains a few record tables to show the knowledge articles connections to other activities within SN. Some record tables include Affected Products (incidents attached to this article), Knowledge Feedback (comments) and Approvals.



2. ServiceNow KB Article Approval Form

The ServiceNow KB Article Approval Form is the main entry point for approving, rejecting and commenting on every stage of the Publishing Lifecycle and Retirement Lifecycle.

Header and Footer

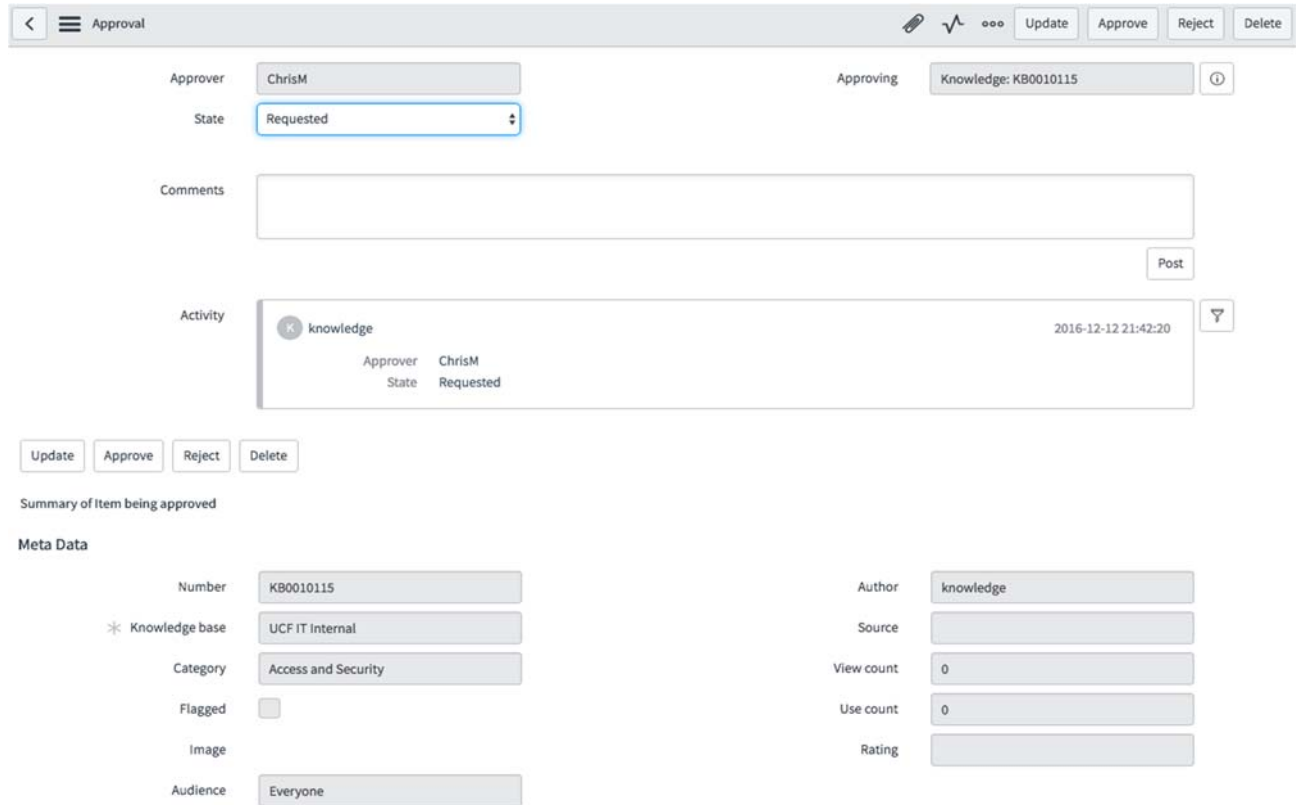
The Header and Footer are similar to ServiceNow KB Article Form in presentation and functionality as shown in Figure 26. Table 13 explains the function or action each button provides that are specific to the approval form.

Table 13 ServiceNow KB Article Approval Form Header and Footer Buttons and Actions

| Button | Action |
|---------|--|
| Approve | Approves this stage of the Lifecycle Workflows |
| Reject | Rejects this stage of the Lifecycle Workflows; it requires adding a comment. |

Sections and Fields

The sections and fields make up the approval, rejection and comments of a KB article stage as shown in Figure 26.



Approval

Update Approve Reject Delete

Approver: ChrisM Approving: Knowledge: KB0010115

State: Requested

Comments

Post

Activity

knowledge 2016-12-12 21:42:20

Approver: ChrisM
State: Requested

Update Approve Reject Delete

Summary of Item being approved

Meta Data

Number: KB0010115 Author: knowledge

* Knowledge base: UCF IT Internal Source:

Category: Access and Security View count: 0

Flagged: Use count: 0

Image: Rating:

Audience: Everyone

Figure 26 ServiceNow KB Article Approval Form

Posting comments is possible at any time during the approval stage. When rejecting a particular stage of an article, a comment must be included to explain and offer an alternative solution or rationale.

Other fields included on the ServiceNow KB Article Approval Form draw from the KB Article in its current state to help in the rejection or approval.