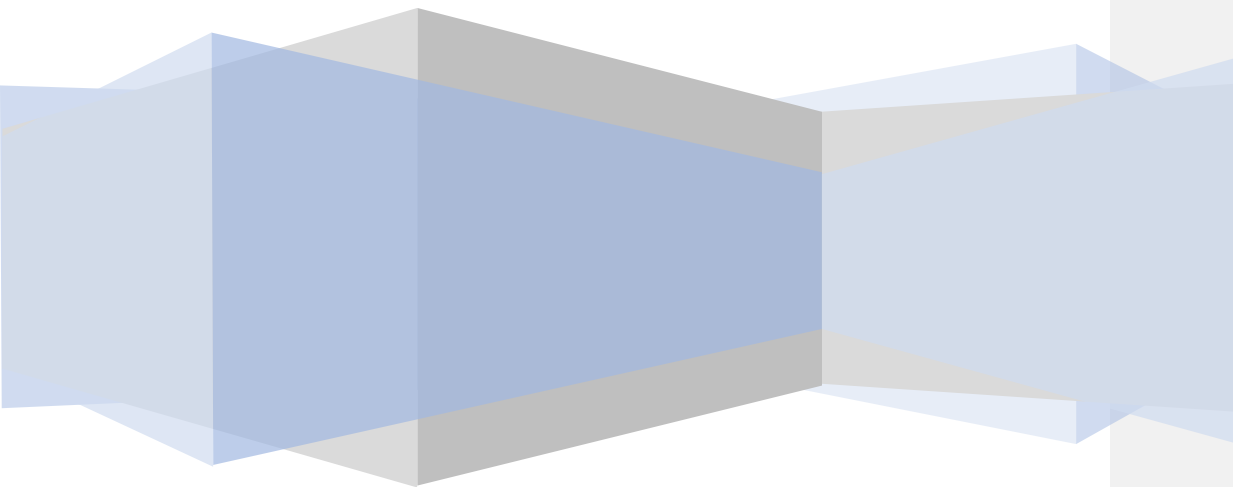


Prepared By Cherwell Software

# Knowledge Management Process

## Vanderbilt University

June 30, 2020



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## Version History

Date	Version	Who	Comments
6/4/2018	1.0	Kevin Kraus	First draft
6/7/2018	1.1	ITSM team	Edits, additions
7/10/2018	1.2	Knowledge Process Owner	Edits
10/18/2018	1.3	Knowledge Process Owner	Revise access definitions and forms
6/30/2020	1.4	Tammy Osborne	Review for any updates, cosmetic changes
9/10/2020		Taj Wolff	Approval of processes in this document

## Summary

Knowledge transforms collective data from across the Vanderbilt community into usable information for IT users and customers. Knowledge expedites resolutions to incidents, requests, and problems, and it encourages collaboration between IT support providers.

Knowledge articles are distinct entries in the Knowledge Management system that provide solutions to customer incidents or requests, or workarounds to existing problems. Knowledge articles can document how to do something, solutions and workarounds to known issues, and provide general information.

### Goals of Knowledge Management

- Maximize quality, consistency, and efficiency by capturing and reusing IT knowledge.
- Support the enterprise mission by making the most of IT resources.
- Improve efficiency by reducing the need to rediscover knowledge.

A robust Knowledge Management process results in a lower cost of ownership for IT systems and improves the customer perception of IT.

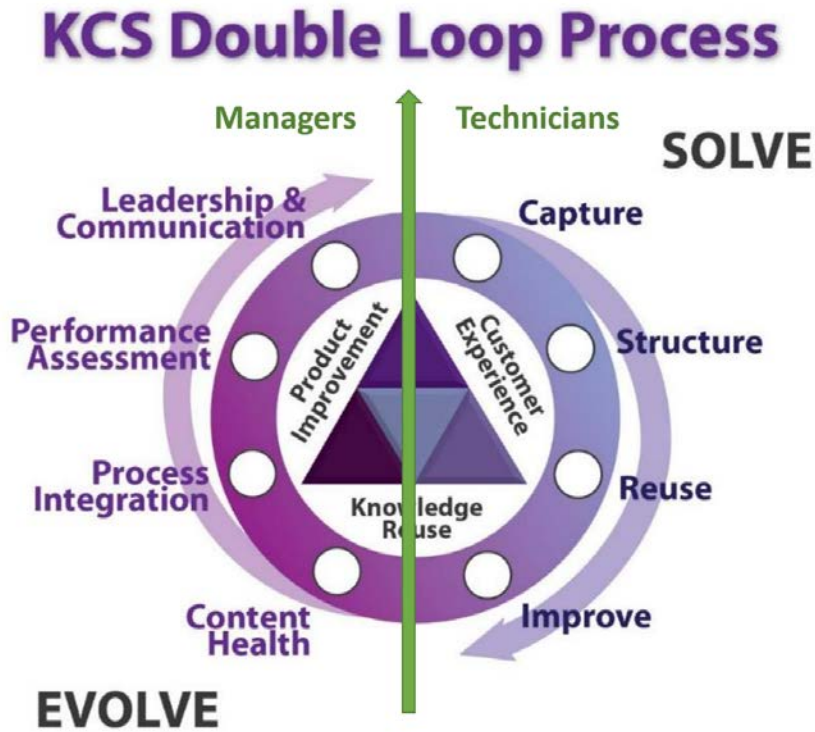
- IT issues are solved as quickly as possible, benefiting customers and IT support providers.
- IT issues are solved at the lowest and least expensive support tier.
- IT projects can be addressed more quickly as IT support providers eliminate the need to re-solve repetitive support issues.

## Knowledge Centered Support (KCS)

Knowledge Centered Support (KCS) is “A set of best practices for IT Knowledge Management that result in enhanced quality of service, improved efficiencies, and higher customer and employee satisfaction.”

The Consortium for Service Innovation developed Knowledge Centered Support in 1992 as a methodology for Knowledge Management. It does not replace ITIL principles, but it compliments ITIL as a set of best practices for Knowledge Management.

Additional information about Knowledge Centered Support is available from The Consortium for Service Innovation (<http://www.serviceinnovation.org/>).



**Solve Loop**

Represents the individual workflow that is driven by the problem-solving process.

**Evolve Loop**

A continuous improvement process that integrates individual and organizational processes.

Source: The Consortium for Service Innovation

## KCS Roles and Knowledge Approvals

KCS roles are assigned based on experience with the KCS process.

### Candidate

- The training role for new hires and staff learning the KCS process.
- A candidate can search knowledge, link knowledge articles to ticket resolution, capture information for new knowledge articles, and flag knowledge articles for review.
- Candidates can create but cannot publish knowledge.
- They can flag existing knowledge articles for review, but they cannot update or rework articles.

### Contributor

- A contributor is an IT user who has a proven proficiency in creating and reworking knowledge articles.
- A contributor can create, edit, and publish knowledge articles for an internal IT audience.

### Publisher

- A publisher is a contributor who can also create and rework public facing knowledge content on web sites and customer portals.

### Coach

- A coach is an IT user who champions the use of KCS, and who encourages article accuracy and consistency.
- A coach can create, edit, and publish knowledge articles to internal IT audiences, and review and publish draft articles from candidates.
- A coach meets periodically with other IT users and coaches and supports the development of candidates and contributors.
- Coaches are key to a successful KCS implementation.

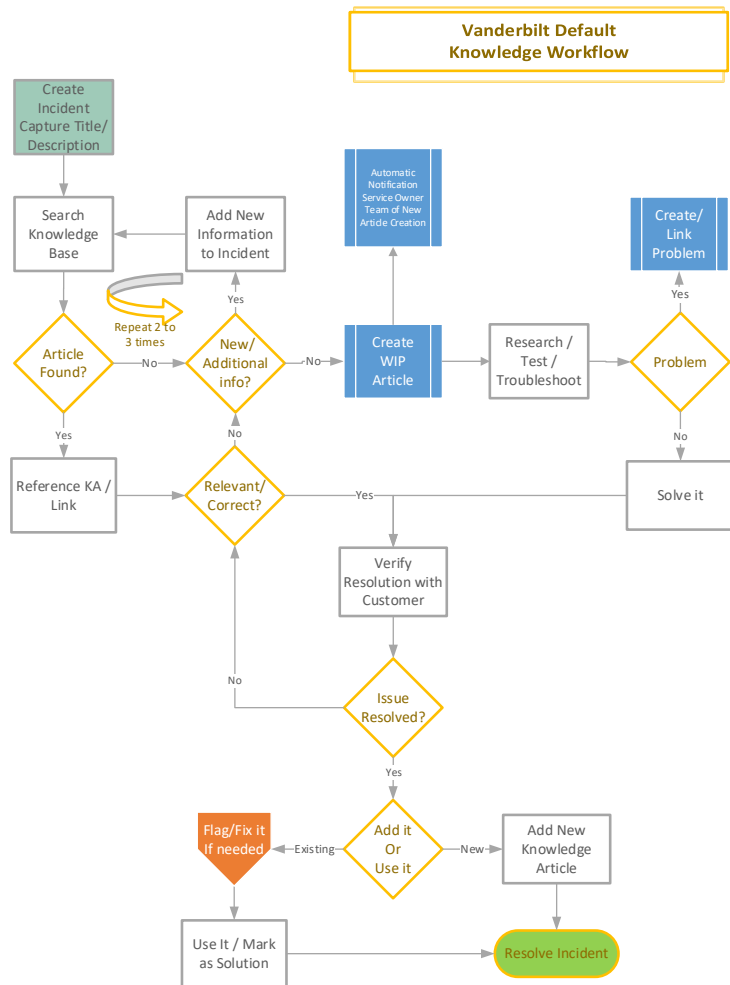
### Domain Expert

- A domain expert is a subject matter expert who reviews specific areas or classifications of knowledge articles.
- A domain expert is skilled in a particular area or topic.

### Program Manager (Process Owner)

- The program manager is responsible for the maintenance and upkeep of the Knowledge Management process.
- The program manager ensures that Knowledge Management supports IT service providers, IT users, and other IT Service Management processes.
- The program manager promotes and supports the adoption of KCS principles.

# Knowledge Workflow



## When is Knowledge created?

Knowledge is created when there is a need to capture and share information. Knowledge creation is integrated into the standard workflow for resolving incidents, requests, and problems.

## Who can create Knowledge?

Knowledge articles can be created by anyone in IT for any team.

### Knowledge Owner

Knowledge articles are owned by teams, which are ultimately accountable for knowledge content.

However, everyone is responsible for maintaining accurate and usable knowledge:

#### **UFFA**

**U**se It

**F**lag It

**F**ix It

**A**dd It

### Types of Knowledge Articles

#### **How To**

Accomplishing a task such as installing software or configuring a VPN connection.

#### **Service Bulletin**

Communicate a known issue such as a specific laptop model overheating.

#### **Solution**

Based on root cause of an error, warning, something that is not working as expected, or something that is not producing the desired outcome.

#### **Question and Answer**

Used for general information and documentation.

#### **Policy and Procedure**

Used for internal tracking of specific steps to achieve a certain task.



## Knowledge Article Templates

### How To

How To: 99

Status: **Work In Progress** Version: 1

[New](#) [Edit](#) [Publish](#) [Refresh](#) [Archive](#) [Delete](#)

Owned by Team  Team Only  
VUIT ITSM

Customer Portal Publication  
Not available for Team Only articles  
 VU Authenticated  
 Public Facing

Resolved Count -- --

Referenced Count -- --

Self-Service Count -- --

I Want To:

[Search for Duplicates](#)  
[Flag as Duplicate](#)  
[View Detailed Creation/Modification Information](#)

Title:

Type: **How To**

Service:

Category:

Subcategory:

Description (Displays to the Customer Portal):

Procedure (Displays to the Customer Portal):

Keywords:

Comments / Review Needed

Environment:

Additional Information:

### Service Bulletin

Service Bulletin: 99

Status: **Work In Progress** Version: 1

[New](#) [Edit](#) [Publish](#) [Refresh](#) [Archive](#) [Delete](#)

Owned by Team  Team Only  
VUIT ITSM

Customer Portal Publication  
Not available for Team Only articles  
 VU Authenticated  
 Public Facing

Resolved Count -- --

Referenced Count -- --

Self-Service Count -- --

I Want To:

[Search for Duplicates](#)

Title:

Type: **Service Bulletin**

Service:

Category:

Subcategory:

Applies To (Displays to the Customer Portal):

Details (Displays to the Customer Portal):

Keywords:

Comments / Review Needed

Additional Information:

## Solution

Solution: 99

Status: **Work In Progress** (Version: 1)

Owned by Team: **Team Only** (VUIT ITSM)

Customer Portal Publication: Not available for Team Only articles (VU Authenticated, Public Facing)

Resolved Count: --

Referenced Count: --

Self-Service Count: --

I Want To: Search for Duplicates, Flag as Duplicate, View Detailed Creation/Modification Information

Coaching Tools: Create New Article Quality Index, Remove Duplicate Article Flag

Title:

Type: **Solution Article**

Service:

Category:

Subcategory:

Keywords:

Comments / Review Needed

Description (Displays to the Customer Portal):

Environment:

Root Cause:

Additional Information:

Resolution Details (Displays to the Customer Portal):

## Question and Answer

Q and A: 99

Status: **Work In Progress** (Version: 1)

Owned by Team: **Team Only** (VUIT ITSM)

Customer Portal Publication: Not available for Team Only articles (VU Authenticated, Public Facing)

Resolved Count: --

Referenced Count: --

Self-Service Count: --

I Want To: Search for Duplicates, Flag as Duplicate, View Detailed Creation/Modification Information

Title:

Type: **Question and Answer**

Service:

Category:

Subcategory:

Keywords:

Comments / Review Needed

Question (Displays to the Customer Portal):

Environment:

Answer (Displays to the Customer Portal):

Additional Information:

## Policy and Procedure

P and P: 99

Status: **Work In Progress** Version: 1

[Publish](#) [Refresh](#) [Delete](#)

Owned by Team  Team Only  
VUIT ITSM

Customer Portal Publication  
Not available for Team Only articles  
 VU Authenticated  
 Public Facing

Resolved Count -- --

Referenced Count -- --

Self-Service Count -- --

I Want To:  
[Search for Duplicates](#)  
[Flag as Duplicate](#)  
[View Detailed Creation/Modification Information](#)

Title:

Type:

Service:

Category:

Subcategory:

Description (Displays to the Customer Portal):

Procedure (Displays to the Customer Portal):

Keywords:

Comments / Review Needed

Applies To:

Additional Information:

## Searching Knowledge

Knowledge searches rely on metadata entered when knowledge articles are created, including keywords and service subcategories.

Knowledge article text fields and attachments are also indexed and used for searching.

## Viewing Knowledge and Knowledge Access

Knowledge article access levels include the following:

### Owned by Team

Limits access to members of the owned by team and administrative IT Service Management team.

**Internal IT (IT users)**

Gives access to all IT users who are members of a SerVU team and who use the SerVU client.

**VU Authenticated**

Gives access to all IT users and customers with VU credentials. VU authentication is required.

**Public**

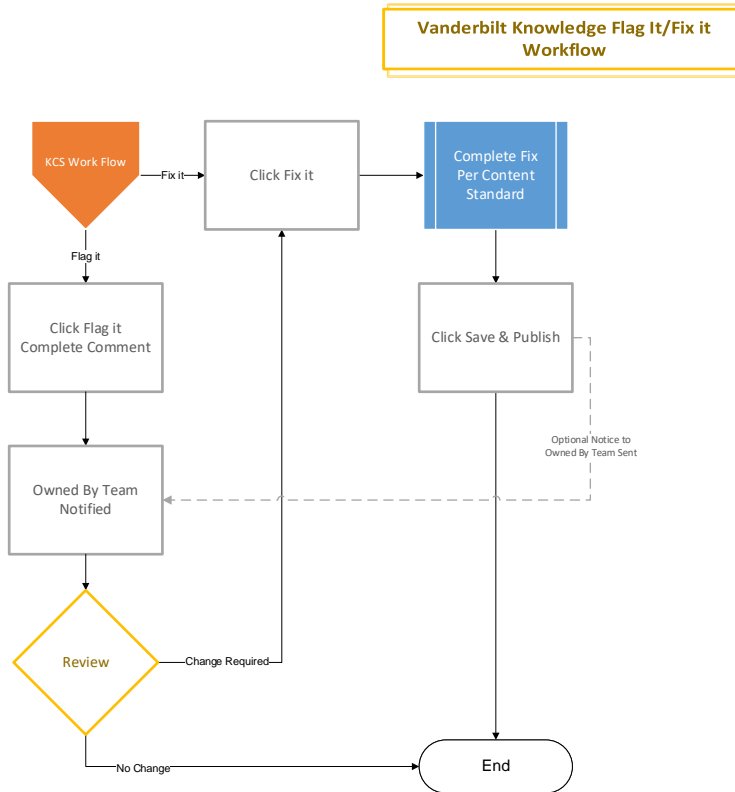
Gives access to all users and customers. VU authentication is not required.

## Updating Knowledge

Any IT user (except for those with a KCS role of candidate) can edit or rework articles owned by any team. An update triggers a notification to the owned by team.

Any IT user can flag a knowledge article for review by the owned by team.

## Knowledge Flag it / Fix it Workflow



## Knowledge Statuses and Lifecycle

Knowledge article statuses include the following:

### Draft

- Unpublished knowledge article created by a KCS candidate.
- Draft articles are reviewed and published by KCS coaches.
- Draft articles can be viewed by all IT users, unless designated as a team only article.

### Work in Progress

- Unpublished knowledge article created by a KCS contributor, coach, or publisher.
- Work in progress articles can be viewed by all IT user, unless designated as a team only article.

### Published

- Knowledge article that has been reviewed and finalized.
- Customer (non-IT) access is not available until the article is published.

### Rework

- Published article that is being updated, often as a result of being flagged for review.

### Archived

- Previously published knowledge article that is no longer relevant.

A knowledge article can be deleted in a draft or work in progress status, before it is published. Previously published knowledge articles are archived; they cannot be deleted.

Commented [WTS1]: Might be helpful to say who can view these