Creating a Solution Article from a Case

KB0037419

13 Views

**Published to customer portal:** No

**Overview**

The Knowledge Management (KM) team has recently made changes to streamline the way knowledge is created in EpicCare. Effective **December 19, 2017**, Support agents will be able to create Solution articles directly from the Case form and publish this knowledge for internal consumption only.

A Solution article is a type of knowledge article created based on the outcome/resolution of a Case or Problem. Agents are *not* expected to create a Solution for every Case or Problem they resolve; however, a Solution should be created for those scenarios whereby a great deal of time or research was required to resolve the issue for the customer or for those unique situations that arise and there is little to no prior knowledge or information available to assist the Support agent.

**Note**: *Individual business areas may opt to set their own expectations for when a Solution should be created.*

Solution articles are made up of four basic fields or elements:

* **Issue:**What is the customer trying to do or what is not working?
* **Error:**What is the full error message and what are the error details?
* **Resolution:**What is the answer to the question or the steps required to resolve the issue?
* **Notes:**What troubleshooting steps were taken to identify the issue? What was the underlying source or cause of the issue?

The Solution article should only be created when the agent is ready to resolve the case.

**Note**: *Prior to creating any Solution article, Support agents are expected to search for related content to avoid having duplicate knowledge articles in EpicCare.*

This Step-by-Step Procedure outlines how each field should be completed and the steps required of Support agents to create a solid Solution article from the Case form.

**Note**: *Only Support agents identified by their respective management teams will be given access to create a Solution article from a Case. In addition, agents are required to adhere to the best practices outlined by the KM team and their respective business area when creating knowledge in EpicCare.*

**Related Links**

[Knowledge Article Types in EpicCare](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010740)

[Basic Writing Tips for Creating Knowledge Articles](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010587)

[Knowledge Article Creation from Case Video](https://bcove.video/2ti6iDf)

**Creating a Solution**

Support agents adhere to the steps in the table below when creating a Solution article from a Case.

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1 | **Note**: *All steps outlined in this table below are performed directly from the Case form as the Support agent is preparing to resolve the Case. Prior to creating any article, all agents must search for existing content to avoid having duplicate knowledge in EpicCare.* Click **Resolve Case:*** Go to the**Resolution Information**tab
* Select the applicable**Resolution Code** from the drop-down menu
* Select the applicable **Resolution Sub Code** from the drop-down menu
* Key the steps taken to resolve the Case

**Note**: *Resolution* s*teps must be written using Step/Action commands. Please refer to the*[*Basic Writing Tips for Creating Knowledge Articles QRG*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010587)*for guidelines on Step/Action formatting.* * Click the **Convert to Knowledge** checkbox

 Go to step **2**. |
| 2 | Did the **Solution** **Template** tab appear? * If **yes**, go to step **3**.
* If **no**, go to step **17**.
 |
| 3 | Click the **Solution** **Template** tab.**Note**: *The fields below display:** **Title**
* **Meta Tags**
* **Issue**
* **Error**
* **Resolution**
* **Notes**

Go to step **4**. |
| 4 | Go to the **Title** field:* Key the title of the Solution article
* Ensure the title is understandable by a layperson or user with limited to no experience

***Note****: The title must be clear and concise. Typically, a title should be six (6) words or less. Omit using the words "how to" from the title.* **Example**:*How to Create a Solution Article from a Case Form (long-winded)**Creating a Solution Article from a Case (clear and concise)* Go to step **5**. |
| 5 | Go to the **Meta Tags** field:* Key the following keywords/tags in the field as they relate to the article:
	+ **Solution**
	+ Other keywords and phrases
	+ Error messages, if applicable
	+ Asset/Module(s) and/or Product Model(s)
	+ Asset categories
	+ Misspelled words
	+ Acronyms
	+ Abbreviations

**Note**:*Separate each keyword or phrase with a comma and a space.The Meta field must include all words that a customer may search for when searching for the article.  The purpose of this field is to include additional text indexed for search purposes. It is not shown when viewing the article.* Go to step **6**. |
| 6 | Go to the **Issue** field:* Explain/define what the customer is trying to do or what is not working?

**Note**: *Be sure to write using complete sentences and to provide as much detail as possible. Customers and agents will use the Issue section to determine if an article is relevant to them.*Go to step **7**. |
| 7 | Go to the **Error** field.Is there an error message related to this case?* If **yes**, go to step **8**.
* If **no**, go to step **11**.
 |
| 8 | Are you including a screen shot?**Note**: *A screen shot is completely optional.** If **yes,**go to step**9.**
* If **no,**go to step**10.**
 |
| 9 | Deselect (uncheck) the **Error - Plain Text** checkbox: **Note**: *The field is no longer Plain text; HTML formatting now applies.*    * Key the exact error message as it appears on the screen in the **Error** field.
* Copy/paste the screen shot into the **Error** field.

Go to step **11**. |
| 10 | Key the exact error message as it appears on the screen in the **Error** field. **Note**: *By default, the Error field uses Plain text formatting. End-users may elect to use HTML formatting by simply deselecting (unchecking) the Error -Plain Text checkbox.* Go to step **12**. |
| 11 | Key **N/A** in the **Error** field.Go to step **12**. |
| 12  | Go to the **Resolution** field: **Note**: *The Resolution Notes (Internal) automatically populates the Resolution field of the Solution Template tab.* * Confirm the **Resolution Notes** from the **Resolution Information** tab carried over to this field.
* Make any changes as needed
* Ensure all steps are numbered
* Ensure all steps are written using step/action commands

 **Note**: *By default, the Resolution field uses Plain text formatting. End-users may elect to use HTML formatting by simply deselecting (unchecking) the Resolution - Plain Text checkbox.* Go to step **13**. |
| 13 | Go to the **Notes** field.Are there there any Notes related to this case?* If **yes**, go to step **14**.
* If **no**, go to step **15**.

 **Note**:*The Notes field should capture any troubleshooting steps taken to identify the issue, steps to test/replicate the issue in the software, and/or the underlying source/root cause of the issue (if known). Include the source Case number, Problem record number detail (where applicable), and any other helpful information related to the Case.**Troubleshooting steps are the steps taken to verify that a problem or issue actually exists. Resolution steps are the steps to resolve the issue, once it is identified by the agent.* |
| 14  | Key any troubleshooting steps or steps taken to replicate the issue in the **Notes** field.Include the root cause if known. **Note***: By default, the Notes field uses Plain text formatting. End-users may elect to use HTML formatting by simply deselecting (unchecking) the Notes - Plain Text checkbox.*  Go to step **15**. |
| 15  | Click **Save & Go****Note***: A system notification appears with the newly created draft KB article number and corresponding Case number. The KB article number can also be retrieved from the Case form in the Knowledge Article field. The article will move forward to a Published state once the case is closed.* **Action steps complete** |
| 16 | Reach out to your respective manager to request training for creating a Solution article from the Case form. **Note**: *Agents who have not been given access to create a Solution article will not see the Solution tab on the case form. Instead, a knowledge submission (SUB) will generate once the Convert to Knowledge checkbox is checked and the case is closed.  The Knowledge Champs for the respective Product team will oversee the SUB and potential article creation.***Action steps complete** |