Direct-Entering Knowledge in EpicCare

KB0010124

7 Views

**Published to customer portal:**No

**Overview**

This article will provide Knowledge Champions (KC) the correct steps for publishing knowledge in the EpicCare Knowledge Bases (KB).

KCs are required to complete the Knowledge Management (KM) training sessions prior to entering any knowledge in EpicCare.  For more information about training and the KM program, please see the [Twenty Questions on Knowledge Management (KM) at Epicor](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010206) article.  The[KM Team](mailto:knowledgemanagement@epicor.com) will work with the nominated KCs from each Support Team to help publish high-value content using the article templates in EpicCare.  It is important to use the predefined templates in EpicCare because we are changing the way knowledge is used as we continue to implement the Knowledge-Centered Support (KCS) methodology within Epicor.

Trained KCs are able to bypass the KB Submission process.  All other EpicCare users may reference the [Submitting a Knowledge Request](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0011686) article for ways they can contribute.

**Related Links**

[Twenty Questions on Knowledge Management (KM) at Epicor](https://epicorcs.service-now.com/nav_to.do?uri=/kb_view.do%3Fsys_kb_id%3D7431892b4f3916007913ab99f110c7f2)

[Submitting a Knowledge Request](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0011686)

[Searching for Knowledge in EpicCare](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0032346)

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

[Knowledge Article QA Checklist](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0027497)

[Using Hyperlinks in a KB Article](https://epicorcs.service-now.com/nav_to.do?uri=/kb_view.do%3Fsysparm_article%3DKB0010223)

[Inserting Images into an Article](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010238)

[Creating a Solution Article from a Case](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0037419)

**Publishing Knowledge**

Knowledge Champions adhere to the steps in the table below when directly publishing knowledge in EpicCare.

| **Step** | **Action** |
| --- | --- |
| 1 | **Note**: *Please have all content Subject Matter Expert (SME) reviewed before continuing to directly publish knowledge.*    Review the high-value content in question:   * Determine if a KB article already exists for this topic     **Note**: *Please see*[*Searching for Knowledge in EpicCare*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0032346)*for searching tips.  Knowledge champions also have the option to search keywords in either of the modules under the Knowledge application (e.g. Unpublished list).*    Does an article already exist?   * If **yes**, review and edit that KB number. **Action steps complete** * If **no**, determine the appropriate knowledge article type to convey this information and go to step **2**.     **Note**: *Please see*[*Knowledge Article Types in EpicCare*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010740)*for additional help.* |
| 2 | Access the new knowledge record form in one (1) of three (3) ways:   * Log in to EpicCare * Go to the left navigation pane * Click **Homepage** under the Knowledge application * Click the **Create an Article**button   **OR**     * Log in to EpicCare * Go to the left navigation pane * Go to the **Knowledge** application * Click **Create New**     **OR**   * Log in to EpicCare * Go to the left navigation pane * Click **Unpublished** under the Knowledge application * Click **New**     **Note**: *Using this last option gives users the ability to pre-populate some of the fields found on the new knowledge record form by adding a filter to the list.****For Example****: Click the filter icon, click****AND****, select a field and a condition/value and click****Run****(e.g. Adding a filter to see only articles where****Publish to Customer Portal****is true will default that setting when clicking the****New****button to create a new article).*    Go to step **3**. |
| 3 | Does the article apply to all of Epicor's Product Lines?   * If **yes**, select **Global Knowledge** in the Knowledge base field and go to step **7**. * If **no**, go to step **4**. |
| 4 | Does the article apply to more than one of Epicor's Product Lines?   * If **yes**, select **Multi-Product** in the Knowledge base field and go to step **6**. * If **no**, go to step **5**. |
| 5 | Select the applicable Knowledge base for the article  Go to step **6**. |
| 6 | Select the primary **Product line**    **Note**: *The Product Line field is important to ensure any knowledge-related tasks are assigned to the correct group.  Also, search logic and access/entitlement are dependent on this field.  Typically it will match the KB field.*    Go to step **7**. |
| 7 | Key a brief title in the **Short Description** field    **Note**: *Please use six (6) words or less so that it is clear, use appropriate capitalization, and avoid using the words "How to".  Please see*[*Knowledge Article QA Checklist*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0027497)*for details on creating a solid and concise****Short Description****.*    Go to step **8**. |
| 8 | Key the following in the **Meta** field as it relates to the article:    **Note**: *Separate each keyword or phrase with a comma and a space or by pressing Enter to start a new line.*     * Article type (e.g. procedure, solution, faq, or qrg) * Keywords and phrases * Error messages, if applicable * Asset/Module(s) and/or Product Model(s) * Asset categories * Mispelled words * Acronymns * Abbreviations * Previous solution or answerbook page numbers     **Note**:*The Meta field needs to include all words that the 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 **9**. |
| 9 | Are there any attachments that will need to be accessed by the user/viewer?   * If **yes**, check the **Display Attachments**checkbox. Go to step **10**. * If **no**, go to step **10**. |
| 10 | Does the article need to be reviewed/approved by one of the Product Line's Knowledge Champion?   * If **yes**, check the **SME Review** checkbox and go to step **11**. * If **no**, uncheck the **SME Review** checkbox and go to step **11**. |
| 11 | Do you want to publish this article to the customer portal so that external customers can view it?   * If **yes**, check the **Publish to Customer Portal** checkbox. Go to step **12**. * If **no**, go to step **12**.     **Note**: *The Publish to Customer Portal checkbox should be selected for all knowledge intended to be customer-facing and should be deselected for all knowledge that should remain internal.* |
| 12 | What type of article are you creating?   * For a Solution or FAQ article, go to step **13**. * For a QRG or Step-by-Step Procedure, go to step **15**. |
| 13 | Go to the **Template** field:   * Select **FAQ** or **Solution** from the drop-down menu.   Go to step **14**. |
| 14 | Page down to the **Solution Template**/**FAQ Template** tab:   * Complete the fields as applicable   **Figure 1**: *The template fields default to Plain text.*    **Note**: *By default, template fields are in Plain text (see Figure 1).  With this setting, end-users can copy text from multiple sources and paste as plain text into the respective fields. End-users may also opt to use HTML formatting by deselecting (unchecking) the Plain text checkboxes on any field(s) (see Figure 2).  The HTML formatting allows end-users to bold or italicize text, add or remove hyperlinks, and also include screen shots where applicable.*  ***Figure 2****: Deselecting (unchecking) the Plain text checkbox allows for HTML formatting.*    *End-users who wish to make formatting changes to an article, e.g. bold, italics, etc., may also use the****Override Template****checkbox (see Figure 3).  The****Override Template****checkbox should be checked when HTML formatting must be applied.  Changes made to the article using the Override field are not reflected in the individual template tab fields. End-users are encouraged to make HTML formatting changes by either unchecking the****Plain text****checkbox(es)****or****checking the****Override Template****checkbox.*  ***Figure 3****: Override Template field*    Go to step **18**. |
| 15 | Click **Toggle Template Bar**under the**More options**menu  Go to step **16**. |
| 16 | Populate the Quick Reference Guide (QRG) or Step-by-Step Procedure template:   * Check the **Override Template** checkbox to enable the **Article Text** field * Click the applicable template as determined in step **1**.       **Note**: *The Article Text field will populate the respective template.*    Go to step **17**. |
| 17 | Complete each section of the template in the **Article Text** field    **Note**: *Sections with double hypens (--) need to be overwritten.  When copying and pasting each section, select****Remove Formatting****to use plain text so the formatting remains consistent.*    Go to step **18**. |
| 18 | Click **Save & Stay**    **Note**: *Notice the Number field has now been populated with a KB article number.*    Go to step **19**. |
| 19 | Does the article apply to more than one of Epicor's Product Lines?   * If **yes**, go to step **20**. * If **no**, go to step **21**. |
| 20 | Select the remaining applicable product lines only in the **Applies To Other Products** field    **Note**: *Champs do not have to reselect the Product Line chosen in the****Product Line****field.*    Go to step **21**. |
| 21 | Does this article apply only to certain **Product Models**?   * If **yes**, go to step **22**. * If **no**, go to step **23**. |
| 22 | Select the applicable **Product Models** for this article:   * Click  next to **Product Model** field * Click  (the **Add/Remove multiple** button)     **Note**: *The Edit Members screen appears.*     * Key keywords using the **Collection** search box or add a filter * Select all applicable **Product Models** by holding the **Shift** or **Ctrl** keys * Click  (the greater than button) * Click **Save**     **Note**:*If the article applies to all asset/modules of a product, then you can leave the Product Model field blank.*    Go to step **23**. |
| 23 | Does this article apply only to certain product versions?   * If **yes**, go to step **24**. * If **no**, go to step **25**. |
| 24 | Select the applicable versions for this article:   * Click  next to **Product Version** field * Click  (the Add/Remove multiple button)     **Note**: *The Edit Members screen appears.*     * Key keywords using the **Collection** search box or add a filter * Select all applicable product versions by holding the **Shift** or **Ctrl** keys * Click  (the greater than button) * Click **Save**     **Note**:*If the article applies to all versions of a product, then you can leave the Product Version field blank.*    Go to step **25**. |
| 25 | Locate the **Related Links** section of the form:   * Click the**View Article** link to see the article as a user would see it   Is the article's content correct?   * If **yes**, go to step **26**. * If **no**, click the **Edit** button and update the article accordingly. Go to step **26**. |
| 26 | Click the **Edit** button to return to the knowledge record form  Click **Publish**  **Action steps complete** |