Knowledge Article QA Checklist

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**Overview**

This Quick Reference Guide (QRG) article shows the checklist that the Knowledge Management (KM) team uses when reviewing and spot checking knowledge articles.  It is expected that Knowledge Champions (KCs) will use this list to verify that they are doing these things.  These Quality Assurance (QA) efforts are needed due to the surge in knowledge contributors and to maintain a level of quality and consistency throughout our knowledge articles.

**Related Links**

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

[Using Hyperlinks in a KB Article](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010223)

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

**Checklist for Knowledge Article Quality**

The following table has a checklist for creating quality knowledge articles.

|  |  |
| --- | --- |
| **Field** | **Items to Check** |
| Short description | * Is the title of the article clear and concise?     **Note**: *Can a layperson understand the title of the article?*     * Does the title use six (6) words or less? * Does the title use appropriate capitalization?     **Example**:  *new version of Prophet 21 hardware requirements (incorrect)*  *New Version of Prophet 21 Hardware Requirements (correct)*  **Note**: *Refrain from using the words "How to" in the title.*    **Example***:*  *How to Determine the Correct Knowledge Article Type (incorrect)*  *Determining the Correct Knowledge Article Type (correct)* |
| Templates | * Was one of the templates used?     **Note**: *The templates are found by clicking****Toggle Template Bar****under the****More options****menu.  The templates are shown at the bottom of the screen.*      **Note**:*Please refer to the*[*Knowledge Article Types in ServiceNow*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010740)*article for more information.* |
| Overview / Issue | * Is the **Overview**or **Issue** section written in complete sentences? |
| Related Links | * Is the name of the article or web page hyperlinked?     **Note**: *Refrain from using sentences or the actual URL.  Please refer to*[*Using Hyperlinks in a KB Article*](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010223)*for more information.* |
| Resolution and Notes (Troubleshooting) | * Are the steps written using a numbered list?     **Note**: *Refrain from using breadcrumbs (>) and paragraph format.* |
| Resolution, Notes, and Step Action Table | * Does each sentence start with a step/action command or if/then statement?     **Note**: *In order to score points on this parameter, a majority of the sentences must start with a step/action command.* |
| Meta field | * Is the **Meta** field populated?     **Note**: *Things to include are:*   * *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* * *Any other keywords customers or agents will search* |
| Attachments / Screenshots | * Do the attachments have the appropriate Epicor branding? * Are the screenshots scrubbed of any customer or employee specific information? |
| Article Text | * Is the correct font size (12pt), color (black), and type (Verdana) used? |