

# WESTERN SYDNEY UNIVERSITY

## Knowledge Management Playbook Guidelines: Managing Your Knowledge

---



Version A01 vF  
March 2020  
Project Management Office  
Author: Steve Marsh

# Document A01 – Guidelines: Managing Your Knowledge

## Contents

THE BASICS .....	3
Introduction.....	3
Why is managing our knowledge important?.....	3
What are our objectives in managing knowledge? .....	3
Definitions.....	4
Knowledge management lifecycle.....	5
GUIDELINES.....	6
How to manage your knowledge .....	7
WHY MANAGE YOUR KNOWLEDGE .....	7
ESTABLISHING KNOWLEDGE CATEGORIES.....	8
DRAFTING – Knowledge Articles.....	8
REVIEWING AND APPROVING – Knowledge Articles.....	9
PUBLISHING – Knowledge Articles .....	9
UPLOADING YOUR ARTICLE AND ONGOING ADMINISTRATION IN SERVICENOW®.....	9
Knowledge Management Process Overview .....	10
Roles and Responsibilities (excludes any Service Now roles and responsibilities) .....	11
Managing Your Knowledge .....	12

### THE BASICS

#### Introduction

The Knowledge Management playbook provides information and explanation of how you can use Knowledge Management processes to manage your knowledge efficiently and within the ServiceNow® platform.

This playbook outlines the way Western Sydney University expects knowledge is to be created. This playbook provides advice up to the point of uploading your knowledge into the ServiceNow® platform. Advice on managing your knowledge in ServiceNow® is provided separately. Refer to your Knowledge Champion for advice.

#### Why is managing our knowledge important?

Staff and students seeking services often don't know *'the who, what, how, and when to do'* something. Providing accurate, simple, concise and well written information in the form of knowledge articles can support staff members or students seeking services to be able to quickly understand actions and steps they need to take and discover information to support and aid understanding.

Well written knowledge articles, create increased consistency in support you, your team, or business area provide, increase visibility of knowledge to team members, build clearer understanding of ownership of processes, and build collaboration across teams, business units, and with staff and students, using services when change is needed.

#### What are our objectives in managing knowledge?

1. **Be efficient** in providing knowledge to our staff and students, and in the way we manage and administer our knowledge
2. **Continually improve** the quality of service
3. **Increase** staff and student satisfaction

## Document A01 – Guidelines: Managing Your Knowledge

### Definitions

**Knowledge Management** - *“is a business process that formalises the management and use of an enterprise’s intellectual assets. Knowledge Management promotes a collaborative and integrative approach to the creation, capture, organisation, access and use of information assets, including the tacit (inferred/silent), uncaptured knowledge of people.”* - Gartner

Tacit knowledge is knowledge that's difficult to write down, visualize or transfer from one person to another

The goal of knowledge management is to gather, analyse, store, and share across the organisation.

### **Knowledge base**

“A knowledge base contains knowledge categories and articles that provide users with information such as self-help, troubleshooting, and task resolution.”

### **Knowledge category**

“A knowledge category is a way to define a knowledge base. It is like the chapters in a book providing a specific place where related knowledge articles sit.”

**Knowledge article** *“is a common document to show and explain how something can be done. A knowledge article would be established within a knowledge category.”*

**Procedural knowledge articles** *“are step by step instructions on ‘how to’, or ‘action to be taken’, or steps to follow*

**Informational knowledge articles** *“provides general information about a topic or subject”*

Note some articles may include a combination of informational content and procedural steps (e.g. what is annual leave (*information*) followed by how to submit an application for annual leave (*procedures*)).

### Knowledge management lifecycle

Essentially the knowledge management lifecycle consists of 4 basic steps



Create an article to solve the problem/answer the question or provide information using templates and forms to write articles that create consistency and ease of understanding for staff and students

Ensure the content is valid and that the quality standards are respected and maintained

Make articles available to the staff and students, providing a mechanism for feedback on quality and accuracy of the article

Regular review and feedback of articles ensures articles support problem solving, provides an opportunity to update or retire redundant articles

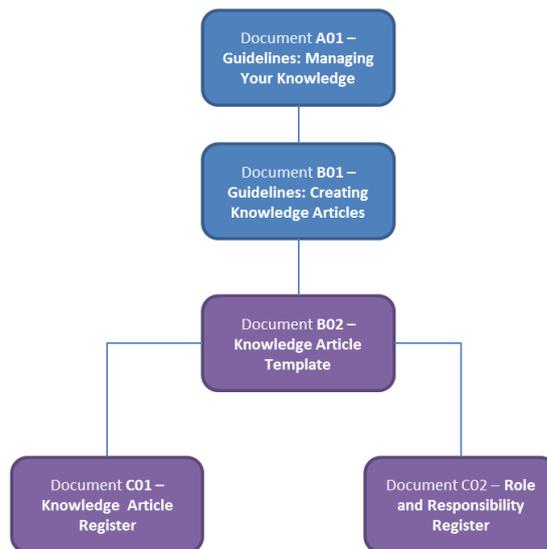
To understand how to create knowledge articles and manage your knowledge refer to [Document B01 – Guidelines: Creating Knowledge Articles](#)

## Document A01 – Guidelines: Managing Your Knowledge

### GUIDELINES

How to use this Playbook. This graphic shows you the documents forming the framework for the Knowledge Management Playbook.

# Knowledge Management (KM) Playbook Framework



## Document A01 – Guidelines: Managing Your Knowledge

### How to manage your knowledge

This section is designed to provide, guidance to assist you in managing your knowledge.

These guidelines covers

1. Why manage your knowledge
2. Establishing knowledge categories
3. Process steps to follow in
  - a. drafting
  - b. reviewing
  - c. approving
  - d. publishing and
  - e. retiring knowledge articles
4. Templates

### WHY MANAGE YOUR KNOWLEDGE

As staff and student need for knowledge grows, capturing and managing it in a singular structured way is becoming increasingly important. Well managed knowledge requires less effort to maintain, improves accuracy, and reduces the amount of time spent responding to repetitive questions. Effective knowledge management assists staff and students obtain information quickly and more timely, improves decision making, and reduces the possibility of 'lost organisational knowledge'. *Its not in someone's head!*

## Document A01 – Guidelines: Managing Your Knowledge

### ESTABLISHING KNOWLEDGE CATEGORIES

In developing your knowledge articles you will need to determine where and how they will be stored and importantly how they can be searched and accessed by staff and students. You should develop a hierarchy based on the following principles

1. Knowledge Base
2. Knowledge Category(ies)
3. Knowledge Article(s)

Creating a hierarchy using these principles will assist you when you establish your knowledge in ServiceNow®.

The Knowledge base should be determined by your business unit sponsor and is where all your knowledge will be maintained. Knowledge categories should be determined by the Knowledge Champion(s) and are the sections where you will store your knowledge articles.

Example

1. Knowledge Base - Human Resources
2. Knowledge Category(ies) – Leave
3. Knowledge Article(s) – How do I apply for annual leave

### DRAFTING – Knowledge Articles

Drafting of a knowledge article is the responsibility of the knowledge developer. A knowledge developer is usually a team member who is a subject matter expert (SME) in the area of knowledge to be developed. There may be several subject matter experts within the team, and they may collaborate in developing a knowledge article for review. Reviewing of your Knowledge Article is undertaken by your Knowledge Champion. To draft a knowledge article [Refer to Documents B01 Creating a Knowledge Article and B02 Knowledge Article Template](#)

## Document A01 – Guidelines: Managing Your Knowledge

### **REVIEWING AND APPROVING – Knowledge Articles**

*This section will help you in reviewing **NEW** knowledge articles for approval prior to publishing in Service Now. This section do not reference managing existing knowledge bases, categories or articles, held in other documents or systems.*

Following drafting of your knowledge article, your article should be submitted to your Knowledge Champion for review.

The Knowledge Champion coordinates day-to-day knowledge management process activities in your area. One of the tasks for the Knowledge Champion is to review your submitted knowledge articles to ensure the content is valid and that your business unit's quality standards are met. If required, they may seek additional information from you and may request the article be amended prior to approval.

Once your article has been reviewed and deemed ready your Knowledge Champion will approve your article for publication. [Refer to C01 Knowledge Article Register.](#)

Following approval the article can be published on ServiceNow®.

### **PUBLISHING – Knowledge Articles**

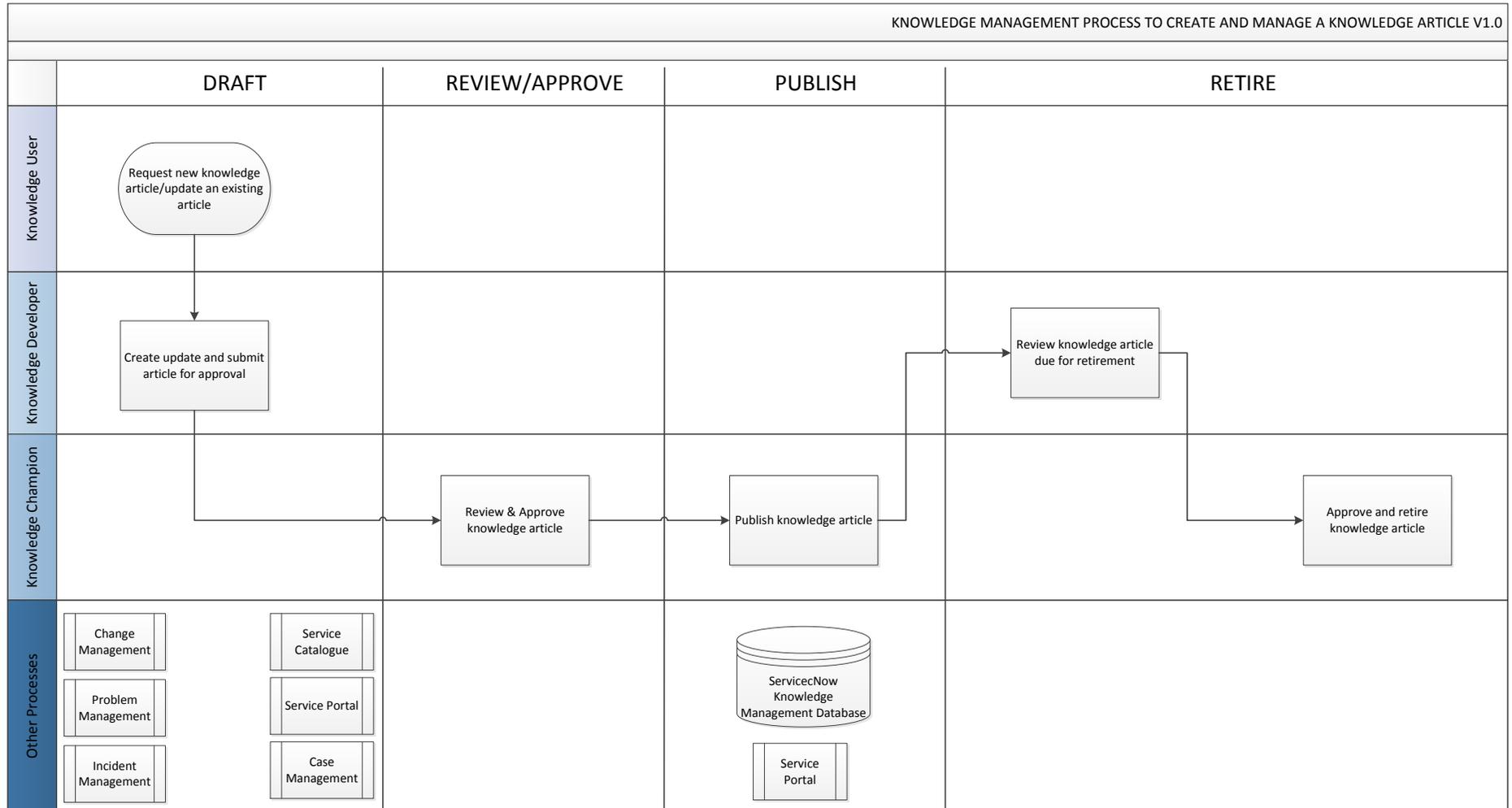
To publish your knowledge article you will require training in Service Now. Please contact your Knowledge Champion to arrange this training.

### **UPLOADING YOUR ARTICLE AND ONGOING ADMINISTRATION IN SERVICENOW®**

Training in managing knowledge within the ServiceNow® platform is available and must be completed. Please contact your Knowledge Champion to arrange this training.

# Document A01 – Guidelines: Managing Your Knowledge

## Knowledge Management Process Overview



## Document A01 – Guidelines: Managing Your Knowledge

### Roles and Responsibilities (excludes any Service Now roles and responsibilities)

Role		Responsibility
<b>Knowledge User</b>	Knowledge users are the staff and students who use knowledge articles.	<ul style="list-style-type: none"> <li>• Review and use knowledge in day-to-day activities</li> <li>• Identify any missing knowledge required for day-to-day activities</li> <li>• Identify knowledge that needs to be updated</li> </ul>
<b>Knowledge Developer</b>	Knowledge developers are those who create and edit knowledge articles to share information across the organisation. Are often known as subject matter experts (SME)	<ul style="list-style-type: none"> <li>• Create Knowledge articles</li> <li>• Submit new knowledge articles for review and approval</li> </ul>
<b>Knowledge Champion</b>	<p>The knowledge champion assigns Knowledge Developers, and supports the daily administration of knowledge, including review and approval steps prior to publishing.</p> <p>They define knowledge category structures, where articles will sit.</p>	<ul style="list-style-type: none"> <li>• Manage and coordinate all of the day-to-day knowledge management process activities</li> <li>• Define knowledge categories</li> <li>• Review submitted knowledge articles to ensure the content is valid and that the quality standards are respected</li> <li>• Obtain the appropriate subject matter expert (SME) validation when needed</li> <li>• Identify need for new content</li> <li>• Approve knowledge articles for publication in Service Now</li> <li>• Encourage people to contribute knowledge articles</li> </ul>
<b>Sponsor</b>	The sponsor is the organisations advocate and lead. They serve as the voice for organisation. They gathers the appropriate support and resources ensuring buy-in.	<ul style="list-style-type: none"> <li>• Provide leadership in the management and delivery of the business unit's services including knowledge</li> <li>• Determine the Knowledge base</li> </ul>

## Document A01 – Guidelines: Managing Your Knowledge

### Managing Your Knowledge

Templates to use

Knowledge Article Register

Refer to C01 Knowledge Article Register.

This template is to be used to track and monitor the development of knowledge articles

Roles and Responsibility Template

Refer to C02 Individual and Team Responsibility Register

This template is to be used to identify the roles and responsibilities within a business unit responsible for all aspects of knowledge management within their unit.