Oracle

Oracle Engagement Cloud

Using Knowledge in Engagement Cloud

Release 13 (update 18C)

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Release 13 (update 18C)
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Contents

Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons.** Not all pages have help icons. You can also access **Oracle Applications Help**.

Watch: This video tutorial shows you how to find help and use help features.

You can also read **Using Applications Help.**

Additional Resources

- **Community:** Use **Oracle Cloud Customer Connect** to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the **Oracle Help Center** to find guides and videos.
- **Training:** Take courses on Oracle Cloud from **Oracle University.**

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
`monospace`	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the **Oracle Accessibility Program website.**

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit **My Oracle Support** or visit **Accessible Oracle Support** if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.

1 Implementing Knowledge in Engagement Cloud

Implementing Knowledge: Overview

You can implement Knowledge for use with Service and HCM HR Help Desk. Knowledge enables administrators and authors to create and manage the knowledge base, which agents can then use to help resolve service requests. General users can use My Knowledge as a central location from which to locate and view knowledge.

Service administrators and account administrators must use qualified accounts to implement Knowledge. Qualified implementation accounts must have sales administrator, customer service manager, and knowledge manager roles assigned to them.

To implement Knowledge, follow these steps:

- Enable the knowledge management functional area.
- Enable knowledge management features in service requests.
- Configure knowledge management capabilities for service requests and the My Knowledge page.
- Schedule the processes that synchronize categories and products with Service and HCM, and update search with changes to knowledge base content.
- Grant roles to users so that they have access to knowledge capabilities.

Note: Note: After you complete the implementation, refer to the Administering Knowledge section to know more about important administration tasks.

Related Topics

- Administering Knowledge: Overview

Implementing Knowledge for Multiple Product Services: Explained

If you implement Knowledge in both Service and HCM HR Help Desk, we strongly recommend that you segregate articles so that they are not shared between the two applications. The capability to share articles between applications may be removed in future releases. To ensure that articles are not shared between applications, authors need to select only one department when creating articles. Authors can select either the Service or HCM department for an article in the Add Details step of the article creation process.

Enabling the Knowledge Management Functional Area: Explained

You enable Knowledge using the opt-in process within Functional Setup Manager. You must have the Application Implementation Consultant role to enable this functional area. When the opt-in process is complete, knowledge managers will have access to the Knowledge Management configuration options.

> **Note:** If you implemented knowledge in a previous release, you must complete this process to ensure access to all knowledge features in this release and in subsequent releases.

To enable Knowledge, follow these steps:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Click Change feature Opt in.
4. Select the Enable option for the Knowledge Management functional area.

Enabling Knowledge in Service Requests: Procedure

You must enable knowledge so that agents can use recommended answers and search for additional knowledge from within service requests. You must have the Sales Administrator or Service Administrator role to enable this feature. To enable knowledge in service requests, follow these steps:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Service Request functional area.
4. Click Manage Service Request Knowledge Profile Options.
5. Select Yes as the Profile Value for the SVC_ENABLE_KNOWLEDGE_IN_SR profile.

Configuring Knowledge in Service Requests: Procedure

You can configure knowledge management in service requests by enabling or disabling knowledge management profile options that control various features, such as the ability to filter search results by category and product. You must have the Knowledge Manager role to enable or disable these features. For most new implementations, these profiles are set to Yes by default, meaning that the features are enabled.

To manage knowledge in service requests:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Knowledge Management functional area.
4. Select Manage Knowledge Panel Profile Options.
5. Select any of the following profile options to enable or disable specific features:
    - To enable the filtering of knowledge panel search results and recommended answers by category, select the CSO_ENABLE_CATEGORY_FILTER option, and set the value to Yes.

- To enable agents to maintain a list of their favorite articles in the knowledge panel, select the CSO_ENABLE_KNOWLEDGE_FAVORITING option, and set the value to Yes.
- To enable agents to link articles to service requests, select the CSO_ENABLE_KNOWLEDGE_LINKING option, and set the value to Yes.
- To enable agents to filter search results by locale, select the CSO_ENABLE_LOCALE_FILTER option, and set the value to Yes.
- To enable the filtering of knowledge panel search results and recommended answers by category, select the CSO_ENABLE_PRODUCT_FILTER option, and set the value to Yes.
- To enable the application to display article excerpts in addition to titles in search results and recommended answers, select the CSO_SHOW_ARTICLE_SNIPPET option, and set the value to Yes.

Configuring My Knowledge Features: Procedure

You can configure knowledge in the My Knowledge page by enabling or disabling knowledge management profile options that control the My Knowledge menu item and the age limit for recent articles. You must have the Knowledge Manager role to enable or disable these features. For most new implementations, these profiles are set to Yes by default, meaning that the features are enabled.

To manage knowledge in the My Knowledge page:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Knowledge Management functional area.
4. Select Manage My Knowledge Profile Options.
5. Select any of the following profile options to enable or disable specific features:

    - To enable the My Knowledge menu for Help Desk, select the CSO_ENABLE_HCM_KMHOME option, and set the value to Yes.
    - To enable the My Knowledge menu for Service, select the CSO_ENABLE_SVC_KMHOME option, and set the value to Yes.
    - To set the upper age limit in days for recent articles, select the CSO_RECENTLY_UPDATED_TIME_PERIOD option, and specify the desired value in days. The default value is 30, so that articles aged more than 30 days will not display as recent articles.

Scheduling Knowledge Processes: Procedure

You must schedule the following processes for Knowledge:

- Knowledge Content Batch Process: This job updates Knowledge categories and products to reflect recent changes to Service and HCM products and categories. Schedule the Knowledge Content Batch Process job to run only once per day. Running this job more frequently is not recommended.
- Knowledge Search Batch Process: This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes.

Scheduled processes are visible only to the user who creates them. You need the SVC_SCHEDULE_SERVICE_JOBS_PRIV authorization to schedule Knowledge processes.

To schedule Knowledge processes, do the following:

1. Sign in to the application as an administrator.
2. From the navigator, select **Scheduled Processes**, then on the next page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** as the process type.
4. In the Name menu, click Search to open the **Search and Select: Name** dialog box, then enter **Knowledge**.
5. Select the process you want to schedule and click OK.
6. Click OK in the **Schedule New Process** dialog box to go to the **Process Details** page for the job.
7. Click **Process Options**, choose the options you want, and click OK to return to the Process Details page.
8. Click Advanced and select **Using a schedule**.

    - For the Knowledge Content Batch Process, specify the frequency as Daily, Every 1 Day. Specify any valid start date.
    - For the Knowledge Search Batch Process, specify the frequency as Hourly/Minute, Every 0 Hours, 15 Minutes. Specify any valid start date.

    Note: Ensure the job has only one schedule.

Related Topics

- Submitting Scheduled Processes and Process Sets: Procedure

Language and Territory Preference for Knowledge Users: Explained

Knowledge supports multiple locales, and an article can exist in a single locale, or be translated into multiple locales. For example, an article might be available in these locales: English United States (en-US), English Canada (en-CA), and French Canada (fr-CA).

When an agent uses knowledge in a service request, or when an employee uses My Knowledge, the application matches the locale of the search results to the user's preferred language, and to their territory. For example, if the user's preferred language is English and their territory is Canada, then the application will display search results in the locale en-CA (English, Canada). If there are no matching articles in the en-CA locale, the application will return no search results.

Oracle recommends that all knowledge users set their preferred language and territory to match the knowledge base locale that they will use most frequently.

Configuring the Default Locale: Procedure

You must set a default locale that the application will use to serve content when the users' preferred language is unknown, or when content in the users' preferred language is unavailable. All knowledge articles and objects must exist in the default locale, because the application must be able to display default locale objects if they are not available in users' requested locale.

You can change the default locale to any supported locale, but you must ensure that all articles and objects are available in the new default locale.

To configure the default locale, follow these steps:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Knowledge Management functional area.
4. Select the Manage Knowledge Locales task.
5. Select any active locale in the Default Locale list.

Configuring Knowledge in Multiple Locales: Explained

You can configure Knowledge to support multiple locales, and you can create and manage content in any of the available locales. The following table lists the available locales:

Language	Territories	Locales	Display Name
Arabic	Egypt, Saudi Arabia, UAE	ar-EG, ar-SA, ar-AE	Arabic - Egypt Arabic - Saudi Arabia Arabic - United Arab Emirates
Chinese (Simplified)	China	zh-CN	Chinese, Simplified - China
Chinese (Traditional)	Taiwan	zh-TW	Chinese, Traditional - Taiwan
Czech	Czech Republic	cs-CZ	Czech - Czech Republic
Danish	Denmark	da-DK	Danish - Denmark
Dutch	Belgium, The Netherlands	nl-BE, nl-NL	Dutch - Belgium Dutch - Netherlands
English	Australia, Canada, Ireland, New Zealand, UK, USA	en-AU, en-CA, en-IE, en-NZ, en-GB, en-US	English - Australia English - Canada English - Ireland English - New Zealand English - United Kingdom English - United States
Finnish	Finland	fi-FI	Finnish - Finland
French (Canadian)	Canada	fr-CA	French - Canada
French (European)	Belgium, France, Switzerland	fr-BE, fr-FR, fr-CH	French - Belgium

Language	Territories	Locales	Display Name
			French - France French - Switzerland
German	Austria, Germany, Switzerland	de-At, de-DE, de-CH	German - Austria German - Germany German - Switzerland
Hebrew	Israel	he-IL	Hebrew - Israel
Hungarian	Hungary	hu-HU	Hungarian - Hungary
Italian	Italy, Switzerland	it-IT, it-CH	Italian - Italy Italian - Switzerland
Japanese	Japan	ja-JP	Japanese - Japan
Korean	Korea	ko-KR	Korean - South Korea
Norwegian	Norway	no-NO	Norwegian - Norway
Polish	Poland	pl-PL	Polish - Poland
Portuguese, Brazilian	Brazil, Portugal	pt-BR, pt-PT	Portuguese - Brazil Portuguese - Portugal
Romanian	Romania	ro-RO	Romanian - Romania
Russian	Russia	ru-RU	Russian - Russia
Spanish	Mexico, Spain	es-MX, es-ES	Spanish - Mexico Spanish - Spain
Swedish	Sweden	sv-SV	Swedish - Sweden
Thai	Thailand	th-TH	Thai - Thailand
Turkish	Turkey	tr-TR	Turkish - Turkey

2 Using Knowledge with Service Requests

Using Knowledge with Service Requests: Explained

You can use Knowledge to help solve service request (SR) issues. While creating or working in an SR, you can quickly insert relevant knowledge base articles into SR communications and send the information to the customers.

Accessing Knowledge while Creating an SR

You can access Knowledge while creating an SR to help resolve issues quickly and efficiently. While creating an SR, you can search for relevant knowledge base articles and add them to your **Favorite Articles** list.

To access knowledge:

1. At any point while you're creating an SR, click the **Restore Pane** arrow and select the **Knowledge** tab.

   The **Search** tab appears. The Search field automatically contains the title of the SR. You can also view the **Favorite Articles** tab.
2. Click the **Search** icon to search on the SR title or enter an alternate term. You can select a **Locale** and **Filter By** options to sort the search results. The locale is set to your language and territory preferences.
3. Select an article.

   The article window displays the contents of the article.
4. Click **Save and Continue** to save the SR and continue editing.
5. Click **Save and Close** to save the SR and close it.

Searching for Articles

If you don't find the article you want in the **Recommended Articles** section, you can search the knowledge base.

Note: You can also configure your locale to search articles in your preferred language.

To search for additional articles:

1. Expand the **Search** area in the **Knowledge** tab.
2. Enter the search term and click the **Search** icon.

Viewing Article Contents

To view the contents of an article:

1. Open an article.

   The article title window displays the contents of the article such as publishing status, relevant products and categories, and other information.

Related Topics

- Configuring Knowledge Locales for Searching Articles

Inserting Knowledge into SR Messages: Explained

You can insert Knowledge articles as text into SR messages to resolve issues efficiently. You can add article contents to an SR directly from the **Knowledge** tab or from the **Article Details** window, or manually using the **Insert Knowledge** option in the Compose message pane within an SR.

Adding Articles as Text to SR from the Knowledge Tab and Article Details Window

You can add articles to SR from the Knowledge pane and from the Article Details window.

Note: You can't insert knowledge as text from the Knowledge pane, if the article is one of the following:

- Unpublished
- Not accessible

To add knowledge as text:

1. Open an SR in edit mode and click the **Restore Pane** arrow.

   The **Recommended Articles** tab lists the articles based on the title of the SR. You can also locate an article from the **Search** tab or select an article from the **Favorite Articles** list.
2. Click the **Insert knowledge article as text in a message** icon from the list in the Knowledge pane or on the Article Details window.

   The article is linked to the SR and is added as text in the **Compose: Response** pane in the **Messages** tab.

   Note: You can add multiple articles as text to the **Compose: Response** tab.
3. (Optional) Select the appropriate **Channel Type** and add a personalized message if necessary.
4. Click **Save as Draft** to save the message as draft
5. Click **Send** to communicate the message through the appropriate channel.

   The list of sent messages appears with the latest message first. You can also click **Cancel** to close the message without sending.

Manually Inserting Knowledge into SR Messages

You can manually insert linked articles into an SR to send the article contents to the recipients. If you want to send an article that is not in the **Linked Articles** list, you must first link the article to the SR and save it.

To insert articles into SR messages:

1. Open an SR in Edit mode and click the **Messages** tab.
2. Select the message type that you want to send from the **Compose** drop-down list.

   The **Compose: message type** pane opens.
3. Click **Insert Knowledge**.

   The **Insert Knowledge** window opens and the articles that are linked to the SR appear.

Note: If you have linked an article and want to insert it in the message, you must save the SR first.

4. Click the **Insert as Text** icon and then click **Done**.

   The article is added as text to the SR message.
5. Edit the article text if needed.
6. Click **Send**, or click **Save to Draft**.

Linking Articles

To link an article to SR:

1. In edit mode, access Knowledge by clicking the **Restore Pane** arrow, then select the **Knowledge** tab.

   The **Recommended Articles** tab lists the articles based on the title of the SR and the product listed in the SR (if applicable). You can remove the product filter by clicking the check mark icon for the products listed in the tab.
2. Click the **Link** icon in the **Knowledge** tab to select the article you want to link to the SR.
3. After linking articles, click **Save** to save the SR.

   You must save the SR after you have linked an article, or it will not appear when you try to insert the article into an SR message.

Viewing Linked Articles

To view articles that are linked to SR:

1. Click the **Linked Articles** tab in the SR.

   The **Linked Articles** window displays all articles linked to the SR.

   Click the **Delete** icon to remove a linked article from an SR.

Adding a Favorite Article: Explained

You can add articles as favorites for quick and easy access. Open an article and then click the **Star** icon. Your favorite articles are saved as your personal favorites and can be accessed when you expand the **Favorites** section on the **Knowledge** tab.

Rating an Article: Procedure

You can rate articles based on their quality and usefulness. You cannot rate articles that you own.

To rate an article:

1. Open an article.

   The article details window displays the contents of the article.
2. Click the **Rate this article** stars to indicate your rating.

3 Using My Knowledge

My Knowledge: Explained

My Knowledge is a centralized location that provides you with a view into relevant knowledge about products and services. My Knowledge is available to knowledge base users, including authors, service agents and help desk agents. You can use My Knowledge to locate articles and if configured, you can also see recently viewed articles and view and manage favorites.

Based on your role and permissions, you can access My Knowledge as follows:

- Service users, select **Service**, and click **My Knowledge**.
- Help Desk users, select **Help Desk**, and then click **My Knowledge**
- Knowledge users, select **Knowledge**, and then click **My Knowledge**.

Related Topics

- Adding a Favorite Article: Explained

Configuring Knowledge Locales for Searching Articles

The Knowledge base articles are associated with your locales. Authors can create articles in any of the supported locales and you can configure the knowledge in any of the 40 locales.

When you use Service Request Knowledge Panel or My Knowledge to locate articles, Knowledge Management matches the locale of the search results to your derived locale. The derived locale is generated based on your preferred language and territory settings. For example, if your preferred language is English and territory is Canada, then your derived locale is en-CA. The search results display articles in your derived locale, en-CA. If there are no matching articles in this locale, Knowledge does not display any search results.

Note: All the knowledge users must set their preferred languages and territory values so that the derived locale matches with the locale of the knowledge base.

Finding Articles: Procedure

You can use My Knowledge to search for knowledge base articles.

To search for an article:

1. Enter the term in the **Search** field.
2. (Optional) Click the **Show Advanced Search** icon and select **Locale** to filter the articles.
3. Click the **Search** icon.

   You can select an article from the search results to view its contents. The article view also contains information about the version, author, last update and publishing dates, and its rating.

4 Using Knowledge Authoring

Knowledge Authoring: Explained

Authorized users can use Knowledge Authoring to create and manage knowledge articles. You can create and publish articles, periodically update them, translate them into supported locales, and unpublish them when they are no longer needed. Agents can use knowledge base articles to easily find solutions to customer issues and link articles to customer incidents. To access Knowledge authoring, select **Authoring** in the Navigator panel.

Knowledge Articles: Explained

Articles are the basic units of the knowledge base. You can create and manage articles in the knowledge base, periodically update them, translate them into supported locales, and unpublish them when they are no longer needed.

About Articles

You can create the following types of articles:

- FAQ
- Solutions
- Content types that are created specifically for your organization

Articles and their translated versions share the article ID. You can select an article to view details about its publishing status, relevant products and categories, and other information.

Locating Articles

You can search for an article by its ID or by doing an advanced search using multiple criteria. You can use the filter to restrict the list to specific criteria. To filter the list,

1. Select a menu to filter by:
    - All Articles
    - My Articles
    - Articles Last Modified by Me
2. Select the value that you want to apply to the list.

To sort the list, select a column and click the up or down arrows. You can sort by Article, Title, Last Updated. You can also add the Live Version column which indicates the current version of the article.

Viewing Article Properties

When you open an article, it displays the article ID, current version, and the date it was last modified. You can also use the slide bar on the page to view the following additional information about the article: live version, date of creation, owner, departments, products, categories, and user groups.

Creating Articles: Procedure

You create an article by selecting the content type, adding required and optional content to the fields, and adding the department, products, categories, and visibility for the article.

To create an article:

1. Click the Create Article tab on the Authoring page.
2. Select the content type.
3. Enter the required and optional content and information for the article.
4. Add the department, products, categories, and visibility for the article.

Choosing the Article Type

You can choose the type of article that you want to create by its content type. The content type is the template for the article you create. Each content type contains defined required and optional fields that you use to write the article.

You can select one of the following content types for an article:

- FAQ
- Solution
- HCM-FAQ
- HCM-Solution
- Content types that are created specifically for your organization, if they are available.

Choosing a Department for an Article

The department that you choose identifies whether an article is part of a Service or HCM knowledge base. Choose only one department for an article, depending on whether your knowledge base is part of a Service application or an HCM Help Desk application. If you have knowledge bases for both applications, choose only one department so that articles are not shared between applications. segregate articles so that they are not shared between the applications.

Adding Categories to Articles

Categories enable you to organize articles by any characteristic or business requirement, such as billing or warranty information, so that you can manage and present related articles consistently. You can add categories to articles to make the article more easily accessible to users who are interested in specific types, or categories, of information. You can add multiple categories to an article. Users can filter search results and browse lists of articles by category.

If there are more than 100 categories, use the Search field to locate categories of interest.

Adding Products to Articles

You can add products to articles to make them more easily accessible to users who are interested in specific information about specific products. You can add multiple products to an article. Users can filter search results and browse lists of articles by product.

To add a product to an article:

1. Select the product from Available Products.
2. Click the right arrows to move the product to Selected Products.

Note: If there are more than 100 products, use the Search field to locate categories of interest.

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Adding a User Group to an Article

You can add the internal user group to restrict an article's availability. Adding the internal user group to an article limits the article's visibility to users who have roles that include the Internal user group, such as Customer Service Representative and Customer Service Manager. Articles that have no user group assigned are available to all users, including those with roles that include the Internal user group.

To make an article available to only to internal users, assign the internal user group. To make an article available to all users, including internal users, do not assign the internal user group.

Creating an FAQ: Procedure

Frequently asked questions (FAQs and HCM FAQs) include a summary statement, a question, and an answer. You can use the text editor to format the information in each section. You can also add the department, products, categories, and user groups that are relevant to the article's subject matter.

To create an FAQ:

1. Select FAQ on the Select Content Type page.
2. On the Create FAQ page, select a locale and enter the following information for the FAQ:
    a. Enter a summary statement or title.
    b. Enter the question that the FAQ addresses.
    c. Enter the answer to the question.
3. Click Next, and add the department, products, categories, and visibility as needed.
4. Click Create to complete the creation process.

Creating a Solution: Procedure

A solution (Solution or HCM Solution) provides detailed information about a specific issue. A solution consists of a summary statement, an issue, a resolution, and information about the environment and the cause. You can use the text editor to format the information in each section. You can also add the department, products, categories, and user groups that are relevant to the article's subject matter.

To create a solution:

1. Select Solution on the Select Content Type page.
2. On the Create Solution page, select a locale and enter the following information for the solution:
   a. Enter a summary statement or title.
   b. Describe the issue.
   c. Provide information about the environment in which the issue occurs.
   d. Provide information about the cause of the issue.
3. Click Next, and add the department, products, categories, and visibility as needed.
4. Click Create to complete the creation process.

Editing Articles: Procedure

You can select an article and update the content and metadata fields as needed.

To edit an article:

1. Select the article from the list.
2. Edit the article content and properties, and select Save or Save and Close as needed.

You can use the **What did you change?** dialog box to record the changes you made to the article.

Checking Out and Checking In Articles: Explained

You can check out and lock articles while you edit them to prevent other authors from editing them at the same time. An article can be checked out only to one user at a time, and during the check out period, only that user can update, publish, or perform any other operation. Users who have the privilege to clear check outs can check in articles that are checked out by other authors.

Note: Checking out articles is optional. If you edit an article without checking it out, the application locks the article so that other authors cannot accidentally overwrite your changes or create conflicts.

To check out an article, open the article, and from the Actions menu, select Check Out. To check it back in, select Check In from the Actions menu.

Commenting on an Article: Explained

You can comment on an article to keep track of your edits. Comments appear in the Comments column in the article history. To track changes to an article, follow these steps:

1. Open the article, and from the Actions menu, select **Edit**.
2. On the edit page, click **What did you change?** and enter your comments.

Changing an Article's Owner: Procedure

You can change the owner of an article to be any author. To change an article's owner, follow these steps:

1. Open the article and open the slider by clicking the Restore Pane arrow.
2. Select **change owner**.
3. Search for the new owner and click **Change Owner**.

Article Versions: Explained

The application assigns a version number to each article. When you create and save an article, it is assigned an initial version of 1.0. Each subsequent update to an article results in a major version increment, for example, 1.0 to 2.0. When you translate an article, the initial translated version is designated as version 1.0, regardless of the version number of the original article.

Comparing Versions

You can compare two versions of an article with one other.

To compare the current live version to the last version, open the article and select **Compare** from the actions menu.

To compare any two versions, follow these steps:

1. Open the article and select **History** from the actions menu.
2. Select the two versions and click **Compare Versions**.

Publishing and Unpublishing Articles

You can publish and unpublish articles. Publishing articles makes them available to users. Unpublishing articles removes them from search and browse lists, so that they are no longer available to users. Unpublished articles and their histories are maintained in the knowledge base.

You can publish articles when you save them. You can also publish a saved draft from the article list page. To publish an article, select **Publish** from the Actions menu. To unpublish, select **Unpublish** from the Actions menu.

Translating Articles: Procedure

You can create a translation of an article in any language that is supported in the knowledge base, and that you have privileges to work in. You translate an article by selecting the new article's locale, supplying the content for the new article, and modifying the new article's properties as needed. The application creates the translated article as a new article, and designates it as version 1.0. The knowledge base maintains a relationship between the translated article and the original article.

To translate an article:

1. Open the article details, select the locale that you want to translate to in the article's Translate area, and click Next.

2. Enter the translated content in the new article template. You can select **Copy Content from Source** to copy the contents of the original article into the new translation.
3. Click Next and modify the article properties as desired. Optionally, you can copy the properties from the source article.
4. Click Create to complete the translation.

5 Administering Knowledge

Administering Knowledge: Overview

You can administer the knowledge application, including the locales in which knowledge is available, the types of articles that the knowledge base contains, and other important functions. You can perform the following tasks to administer the knowledge application:

- Manage locales for the application by activating and deactivating them.
- Specify the locales that authors have access to.
- Define new content types to add new types of articles to the knowledge base.
- Manage application users.
- Configure the My Knowledge page for your organization.
- Manage the jobs that update search as the knowledge base changes.

Managing Knowledge Locales: Overview

Locales designate a language and a specific country or region in which a variant of that language is used. Locales help you to differentiate knowledge content by language and country or region. Important locale-specific differences include regulations, procedures, addresses, currencies, date formats, and country- or region-specific terms.

Knowledge is available for use in all locales supported by the application. You can use Knowledge with multiple locales by activating the locales that you want to use. Knowledge is configured to have a default locale.

Activating and Deactivating Knowledge Locales: Procedure

You can view, activate, and deactivate locales from the Manage Locales page. You can search for specific locales, and list either all locales, active locales, or inactive locales.

Active locales are available for authors to use, and authors can create, translate and publish articles from that locale. Activating a locale makes it available to users, while deactivating a locale makes it unavailable. When you deactivate a locale, users cannot add or update articles, or access them by searching or browsing. Articles in inactive locales remain in the database. To permanently delete the contents of a locale, delete the objects in the locale before deactivating it. You can reactivate a locale to make its contents available to users again.

To activate or deactivate a locale:

1. Go to Setup and Maintenance and select Service from the Setup drop-down list.
2. Select Knowledge Management from the functional areas, and select the Manage Knowledge Locales task.
3. Select the check box of the locale that you want to activate or deactivate.

Managing Locales for Authors: Procedure

You can manage the locales in which authors are authorized to create and edit articles. You can add or remove locales for an author. The Knowledge Users page displays the available and assigned locales for a selected author.

To add or delete locales for authors:

1. Select Knowledge Users in the Navigator.
2. Locate the authors you want to update. You can search by using partial or complete user names or IDs.
3. Select the authoring locales that you want to add or remove and click the arrow icons to move the locales to or from the assigned column. You can select multiple locales in a single operation, or select all of the locales by using the double arrow.

Note: The list of users is limited to three hundred entries. Use search to locate users that are not listed due to this limitation.

What are content types?

Content types define the various types of articles in your knowledge base. A content type definition serves as an authoring template for articles that serve a specific purpose. For example, the application has prebuilt content types for solutions and FAQs. You can define any number of content types and vary the elements that they contain, including the following:

- Content elements, including the title, and the text fields that make up the body of the article.
- Locale-specific article and field-level titles and descriptions.
- Products and categories that are relevant to the content type.
- Visibility to audiences at the article and field levels.

Defining Content Types: Procedure

A Knowledge Manager can define content types. You create the content type by defining the content type, defining the schema for the content type, and defining the content schema details.

To define a content type, do the following:

1. Select Setup and Maintenance from the navigator, and from the Setup menu, select the Service offering.
2. Select the Knowledge Management functional area and select Manage Knowledge Content Types.
3. Click the + symbol to begin creating the content type.

Defining the Content Type

You define the content type by supplying basic information, including a name, an optional description, a prefix ID, and names and descriptions for additional knowledge base locales.

The application automatically assigns a reference key based on the content type name. If you change the content type name after you initially enter it, you can edit the reference key to match the edited name prior to saving the content type data. The description is visible as placeholder text that authors see when creating articles. The prefix ID forms the first part of the article ID that is automatically created for each article in the knowledge base. The prefix helps to identify articles belonging to a specific content type. For example, you might use the prefix NA for a News Article content type. You can use numerals and letters in your document ID prefix.

To define the content type, do the following:

1. Enter a name for the content type.
2. Enter a prefix for the ID number that the application will automatically assign to each article.
3. Enter an optional description.
4. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.

Defining the Content Schema

The content schema describes the structure of the articles in the content type. You define the schema by defining the individual elements that make up an article. For example, you might define the elements of a news article content type to include the elements title, summary, body, and related information.

You can restrict fields within articles to internal users. For example, you might need to define a product support document that includes information that only agents should have access to. Internal users are those with roles that include the Internal user group, such as Customer Service Representative and Customer Service Manager. If you do not select a user group, then the field will be visible to all users.

You can select the type of content that the field will accept. Use the field type field to select text or full rich text. Full rich text fields have a full featured text editor that supports complex formatting and markup, as well as images. Text areas support simple text entry. You can also specify whether authors must enter content in a field, or whether they can leave the field empty.

You define the content schema by defining the title field, then defining the additional fields that you need.

To define the content schema title field, do the following:

1. Enter a title or accept the default. The title field is required for all content types.
2. Enter an optional description for the title field.
3. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.

To define the additional fields, do the following for each element or field that your content type requires:

1. Click the + sign to add additional fields.
2. Enter a name and description for each field.
3. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.
4. Click the visibility icon to optionally restrict this field to internal users only.
5. Select the field type to define the text requirements for each field.
6. Click the check box to specify that authors must enter content in this field.

Defining the Content Schema Details

Content schema details define the products, categories, and audiences that the content type is relevant to. You can search for products, categories, or page through. You can select multiple items from the list, or click the double arrow to move all of the items from one list to the other. Authors can select the relevant products or categories for articles by choosing from among those that you select in the content schema details.

To define the content schema details, do the following:

1. Select the products that you want to associate with the content type.
2. Select the categories that you want to associate with the content type.
3. Select the internal user group only if you want to restrict this content type to internal users.

Assigning Content Type Privileges to Roles: Procedure

Content type privileges indicate the operations a user role can perform on each content type. Roles can have a different privileges for different content types. For example, you may want Knowledge Authors to be able to perform all operations on FAQs, but Customer Service Representatives to be able only to view them.

To assign content type privileges to roles, do the following:

1. Select Knowledge Users in the Navigator.
2. Click Roles to view the list of knowledge roles and content type privileges.
3. Select the role for which you want to assign content type privileges and select the corresponding content type check boxes.

Managing Knowledge Users: Explained

Authorized users can access the **Users** tab to list Knowledge users, review their roles and status, and set user content locales. You define Knowledge users during the application setup. User statuses can be active, inactive, locked, or imported.

You can view the following details for a user:

- Status
- User interface locale
- Security role

The security role governs the content and locales that a user can access, and the actions a user can perform. You can edit a user's content locales by selecting Edit User in the User Properties panel.

Granting Roles to Users: Procedure

You can provide users with access to create or manage content by granting them one of the following roles:

- Knowledge Analyst: This role creates, publishes, and maintains knowledge articles. It also supports customer service managers and agents as they manage customer issues.
- Knowledge Manager: This role manages the administration and operations of the knowledge base or the application. It ensures that users can find Knowledge content and that analysts can create and maintain Knowledge content.

To grant Knowledge roles to users:

Note: You must have the Knowledge Manager role to grant knowledge roles to users.

1. Sign in to the application, and from the navigator, select **Security Console**.
2. Click the Users icon from the menu.

3. Search for the user by entering three or more characters of the user name in the search box.
4. Select the user from the search results and click the user login link.
5. Click Edit in the user account details page.
6. Click **Add Role** in the Edit User Account page.
7. In the Add Role Membership dialog box, search for the role by entering three or more characters in the search box.
8. Select the role from the search results and click **Add Role Membership**.
9. Click OK on the confirmation dialog box and click Done in the Add Role Membership dialog box.

You will return to the Edit User Account page and the granted roles are listed in the roles.

Configuring the My Knowledge Page: Procedure

You can configure the My Knowledge page by adding Recently Updated and Favorites tabs. You configure My Knowledge using Application Composer to activate a sandbox, configure the page, and publish the sandbox. You may need to create a sandbox as part of this procedure.

> **Note:** You must have the knowledge manager role (with the FND_VIEW_ADMIN_LINK_PRIV privilege) to configure the My Knowledge page. You must be an application administrator (with the FND_ADMINISTER_SANDBOX_PRIV privilege) to publish a sandbox.

Configuring at Site Level and Role Level

You should note the following before proceeding with configuring. Configuring done at the role level overrides the configuring done at the site level. The user roles determine the levels at which the configuration is visible.

The following table illustrates the roles and the levels at which the configurations are visible.

User with Roles	Configuration Visibility
customer service representative	• Visible at site level and customer service representative level • Not visible at knowledge analyst level
knowledge analyst and knowledge manager	• Visible at site level and knowledge analyst level • Not visible at customer service representative level
customer service representative, customer service manager, knowledge analyst, and knowledge manager	Visible at all levels

Accessing or creating an Active Sandbox

You must access a sandbox to configure the My Knowledge page. You can access a currently active sandbox, activate an existing sandbox, or create and activate a new sandbox.

To access and activate a sandbox, open the Settings and Actions menu by clicking the user icon on the My Knowledge page, and select Manage Sandboxes. If no sandbox is active, select Activate Sandbox in the Sandbox Required dialog.

If no sandbox exists, create a sandbox and activate it by doing the following steps:

1. On the Manage Sandboxes page, open the Action menu and select New.
2. In the Create Sandbox dialog box, enter a sandbox name and click Save and Close.
3. Click OK on the confirmation dialog box.
4. Search for the new sandbox and make it the default.
5. Click Yes in the dialog box.
6. Select Activate Sandbox in the Sandbox Required dialog.

Adding Custom Content to the Page

Add tabs to the My Knowledge home page as follows:

1. Open the Settings and Actions menu and select **Customize Pages**.
2. Select the Site layer and click **OK**.
3. Click **Add Content** to view the Add Content dialog.
4. Click **Open** if you want to add components such as an image, moveable box, and so on to the page.
5. Click **+Add** if you want to add favorite articles, knowledge search results, or recently updated articles to the page.

The selected content is added to the page.

Publishing the Sandbox

Publish the updated sandbox as follows:

Note: If you configure at the application level, all users see the changed content. If you configure at the role level, only users with that role see the changed content.

1. Open the Settings and Actions menu and select **Manage Sandboxes**.
2. Select the sandbox you created and click **Publish**.

The sandbox is published.

Managing Search Content Processing Jobs: Explained

Knowledge Administrators can start content processing jobs, view status of currently running and completed jobs, and view log details of completed jobs.

The Content Processing page lists the jobs that are currently running or completed. For each listed job, the page displays the type of job, the start and end time, the total time that the job ran, and its completion status. You can refresh the page to update information on currently running jobs.

There are two types of content processing jobs:

- Incremental jobs process only documents and dictionary concept changes that have been updated since the completion of the previous job. Incremental jobs should run every 15 minutes.
- Full jobs process all documents, whether updated or not, and all dictionary concept changes.

Incremental content processing jobs are managed as scheduled processes by the Knowledge Search Batch Process job. The value of the Knowledge Search Batch Processing job should be set to 15 minutes. This value ensures that incremental jobs will run every 15 minutes. Full jobs can be run on-demand as required. You can view the log summary for a completed job.

Related Topics

- Scheduling Knowledge Processes: Procedure

How can I find Knowledge articles in list view?

There is no restriction to the number of articles you can create for a content type. However, when you select List for a content type, the list is restricted to 200 items.

If you have more than 200 articles in a content type, use one of the following methods to change the articles shown in the list:

- Document ID search, if you know the article document ID
- User list filtering to see articles by a specific user
- List sorting to change how the list is sorted

How can I make Knowledge updates available to users?

When authors publish articles, the articles are available to users only after the application updates the knowledge base. Knowledge updates take place at regular intervals. Since publishing can occur at any time, and knowledge base updates occur at fixed intervals, some time may elapse between publishing an article and its availability.

6 Analyzing Knowledge

About Knowledge Analytics

Knowledge Analytics is a real-time reporting solution that enables knowledge managers and knowledge analysts to view knowledge author's activity. This feature offers prebuilt dashboards that help knowledge managers to understand how authors are creating, updating, and publishing knowledge base articles and how they are linking articles to SRs.

Based on your privileges, you can perform the following tasks:

- Run the prebuilt dashboard reports
- Create personalized dashboards
- Create personalized reports and analyses on subject areas
- Share analytics with other users

Understanding Knowledge Analytics Terminology: Explained

You need to familiarize with the BI objects to understand knowledge analytics.

This table contains important analytics terminology:

Term	Description
Analytics	Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.
Analysis	A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.
Dashboard	A collection of analyses and other content, presented on one or more pages to help you achieve specific business goals
Report	An output of select data in a predefined format that is optimized for printing.
Subject Area	Subject areas are the organizational units in the BI repository that contain metadata that define which columns you can include in analyses. Each subject area has a fact folder and a number of dimension folders.

Managing Analytics with the BI Administrator Role

Knowledge Manager is not authorized to perform high level tasks in the BI application.

You need the BI Administrator role to perform the following tasks:

- Personalizing dashboards, reports, and analyses
- Managing catalog groups
- Assigning privileges
- Scheduling publisher

To create and assign the BI administrator role, use the process described in the Oracle Sales Cloud Creating and Administering Analytics guide.

Related Topics

- Managing Analytics with the BI Administrator Role

Responsive Sizing for Knowledge Analytics: Explained

You can enable responsive sizing to optimize analytics display on devices that have different screen resolution and size, such as laptops, tablets, and mobile phones.

To enable responsive sizing, use the process described in the Oracle Sales Cloud Creating and Administering Analytics guide.

Related Topics

- Responsive Sizing for Sales Cloud Analytics: Overview

Managing the BI Catalog Folders

All of your reports, analyses, and dashboards are stored and managed in the Oracle Business Intelligence (BI) catalog.

The pre-built knowledge dashboards are stored in the BI Catalog under Shared Folders in the Service Folder and are organized as follows:

- **Subject Area Contents**: This folder contains data related to subject areas.
- **Analytics Library**: This folder contains generic analytics content which is not role-specific.
- **Embedded Content**: All the Knowledge dashboards are available in the Knowledge Analyst folder. You can use this folder to view and personalize the prebuilt dashboards.

Navigating to the Catalog

To access the catalog:

1. Click **Tools**, **Reports and Analysis** from the Knowledge Home page.

2. Click **Browse Catalog** in the Reports and Analytics page.

   The **Catalog** folder opens.

Saving Analytics to the BI Catalog

Knowledge Managers can save analyses, dashboards, and reports in the BI catalog. The catalog contains a hierarchy of folders that enables you to store objects. You can also create additional folders and add permissions to these folders.

Note: Knowledge Analysts can only view prebuilt dashboards and run reports and analyses that they have access to.

- **Shared Folders:** This folder contains prebuilt dashboards and personalized analytics that you have permission to access. All the users with permissions to this folder can view your data. The shared folder contains Custom and Service sub-folders.
- **Custom Folder:** This is a sub-folder of the Shared Folders. You need to save a copy of prebuilt dashboards to this folder before editing them.
- **My Folders:** This folder contains reports and analyses that you have created. Only you can access the contents of this folder. To share the analytics available in this folder, you need to copy and save the analytics to the Shared Folders.

To create folders and add permissions to it, use the process described in the Oracle Sales Cloud Creating and Administering Analytics guide.

Related Topics

- Creating Folders: Procedure
- Setting Folder Permissions and Attributes: Procedure

About Dashboards: Explained

A dashboard is a collection of reports and analyses organized to display data in a single view. The prebuilt dashboards are available in the BI catalog. The Knowledge Analysts can view prebuilt dashboards and the Knowledge Managers can create personalized dashboards. The information displayed in a dashboard is organized by a set of parameters and metrics. For example, the All Knowledge Breakdown dashboard contains data about all the articles available by products, by categories, by content types, and by locales.

You can access dashboards to view analytics for the following types of transactions:

- **All Knowledge:** Generates analytics for all the knowledge transactions.
- **My Knowledge:** Generates analytics for your transactional data.

It is always advised to copy the prebuilt dashboard from "Shared Folders" to "Custom" folder before you can edit it.

The following table explains the list of prebuilt dashboards available:

Dashboard Name	Description
All Knowledge by Day/ Week/Month	This dashboard shows all the user activity for the last 12 days/ 12 weeks/ 12 months.

Dashboard Name	Description
My Knowledge by Day/ Week/Month	This dashboard shows the individual activity for the last 12 days/ 12 weeks/ 12 months.
All Knowledge Breakdown	This dashboard shows the content available in the repository for the By Product, By Category, By Content Type, and By Locale article attributes.

Accessing Prebuilt Dashboards: Procedure

The prebuilt dashboards are available in the Catalog folder.

To access dashboards:

1. Click **Tools**, **Reports and Analysis** and then click **Browse Catalog**.

   The **Catalog** page opens.
2. From the Folders hierarchy, expand Shared Folders, Service, Embedded Content, Knowledge Analyst, Dashboards and then select a dashboard.
3. Click **Open**.

   The dashboard displays the analytics. You can also filter the dashboards with the following content volume metrics:

Metric Name	Description
All Articles Created	The number of articles created by day/ week/month
All Articles Updated	The number of articles updated by day/ week/month
All Articles Published	The number of articles last published by day/ week/month
All Article Linked	The number of article links done by day.
Links Done By	The number of links done by you.
Links Done For	The number of links done for my content.
By Product	The number of articles by product.
By Category	The number of articles by category.
By Content Type	The number of articles by content type.
By Locale	The number of articles by locale.

Personalizing Dashboards: Procedure

As a knowledge manager, you can personalize the prebuilt dashboards to optimize the data presentation to suit your organizations' needs.

You can also filter information by the available metrics, add and delete pages and objects, and change dashboard properties.

Note: You must copy a prebuilt dashboard and its related objects such as analyses, reports and so on from the Shared Folders location to the Custom folder in order to personalize it.

To personalize a dashboard:

1. Click Tools, Reports and Analysis and then click **Browse Catalog**.

   The **Catalog** page opens.
2. From the Folders hierarchy, expand Shared Folders, Service, Embedded Content, Knowledge Analyst, Dashboards and then select a dashboard.
3. Expand More, click **Copy** to copy the dashboard and then click the **Paste** icon in your Custom folder location.

   The dashboard is copied to your location.
4. Copy and Paste the related objects of this dashboard to the Custom folder.

   Note: You must copy the objects associated with the dashboard to edit it.
5. Click **Edit** and perform one or more of the following tasks, as needed:
   - Add and delete pages.
   - Add and remove content of the dashboard.
   - Drag and drop within a page to move content around.
   - Change the layout of a page.
6. Perform one of the following steps at any time:
   - To preview the dashboard page, click the **Preview** button.
   - To save your changes, click the **Save** button.
   - To exit the Dashboard builder and return to the Dashboard, click **Run**.

About Subject Areas

Knowledge Analytics uses subject areas to create interactive reports and analyses. Subject areas contain metadata that define which columns are available for you to create a report or analysis.

About Dimensions and Facts

A subject area contains dimensions and facts.

- **Dimension:** Dimensions are the knowledge parameters such as articles, dates, and categories that can be measured using facts. Dimensions contain reference information and serve as columns in the report tables.

  Note: You need to select at least one dimension to generate a report.

- **Facts:** Facts quantify dimensions. In the reports, a fact displays values for the selected dimensions. For example, the measure for Articles dimension is 'Number of Articles'. A fact can be associated with multiple dimensions.

Article Real Time Subject Area: Explained

The Article Real Time subject area contains information about articles, such as the version, locale, content type, author, and lifecycle dates. This subject area does not include product, category, or linking information.

Dimensions

Dimension	Attribute	Definition
Article Version	Answer ID	The unique identifier of the article.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The identifier of the article.
	Article Last Updated Date	The date that the article is last updated.
	Article Latest Version	The latest version of the article.
	Article Locale	The language and region of the article.
	Article Major Version	The value that increments when the article is updated.
	Article Published Date	The date on which the article is published.
	Article Title	The title of the article.
	Creation Date	The date on which the article is added to the repository.

Dimension	Attribute	Definition
	Original Creation Date	The date on which the article is originally created and imported.
	Owner ID	The identifier of the article's owner.
	Published	The article is marked as published. .
Base Locale	Locale Code	The code of the locale to which the article belongs.
	Locale Description	The description of the locale.
Content Type	Content Type	The type of content such as an article, or FAQ.
Original Author	User E-mail	The E-mail of the original author of the article.
	User First Name	The first name of the original author of the article.
	User Last Name	The last name of the original author of the article.
	User Locale	The language and region of the original author of the article.
	User Login	The login ID of the original author.
Secondary Dates	Update Date	The date on which the article is updated.
	Update Day Name	The day on which the article is updated.
	Update Enterprise Period	The enterprise period in which the article is updated.
	Update Enterprise Year	The enterprise year in which the article is updated.
	Update Month	The month in which the article is updated.
	Update Quarter	The quarter in which the article is updated.
	Update Year	The year in which the article is updated.
Secondary Dates - Additional Attributes	Update Calendar Month Update Calendar Month End Date	The additional attributes that denote the period in which the article is updated. For more information, see Time Additional

Dimension	Attribute	Definition
	Update Calendar Month Start Date Update Calendar Quarter Update Calendar Quarter Start Date Update Calendar Quarter End Date Update Calendar Week Update Calendar Week Start Date Update Calendar Week End Date Update Day Of Month Update Day Of Week Update Day Of Year Update Enterprise Period End Date Update Enterprise Period Number Update Enterprise Period Start Date Update Enterprise Quarter End Date Update Enterprise Quarter Number Update Enterprise Quarter Start Date Update Enterprise Year End Date Update Enterprise Year Number Update Enterprise Year Period Number Update Enterprise Year Start Date Update Offset Week Update Week Update Week By Year	Attributes in the Article Links Real Time Subject Area.
Time	Date Day Name Enterprise Period Enterprise Quarter Enterprise Year Month Quarter Week	The Time-related attributes of the article. For more information, see Time attributes in the Articles Links Real Time Subject Area.

Dimension	Attribute	Definition
	Year	
Time - Additional Attributes	Calendar Date Calendar Month Calendar Month End Date Calendar Month Start Date Calendar Quarter Calendar Week Start Date Calendar Week End Date Calendar Week Calendar Week Start Date Calendar Week End Date Calendar Year Calendar Year Start Date Calendar Year End Date Day of Month Day of Week Day of Year Enterprise Period End Date Enterprise Period Number Enterprise Period Sort Order Enterprise Period Start Date Enterprise Quarter End Date Enterprise Quarter Number Enterprise Quarter Start Date Enterprise Year End Date Enterprise Year Number Enterprise Year Period Number Enterprise Year Start Date Offset Week Week By Year Year By Week	The additional time attributes available. For more information, see Time Additional Attributes in the Article Links Real Time Subject Area.

Dimension	Attribute	Definition
Version Author	User E-mail User First Name User Last Name User Locale User Login	The E-mail, first name, last name, locale, and login details of the author for the current version.
Version Locale	Locale Code Locale Description	The locale and its description to which the current version of the article belong.
Version Owner	User E-mail User First Name User Last Name User Locale User Login	The E-mail, first name, last name, locale, and login details of the owner for the current version.

Facts

Fact	Attribute	Definition
Article Facts	# of Article Locales	The number of article locales.
	# of Article Versions	The number of article versions.
	# of Articles	The number of articles.

Article Links Real Time Subject Area: Explained

The Article Links Real Time subject area contains information about articles linked to from service requests. Only articles linked to service requests, and service requests linked to articles, appear in this subject area. All the articles are listed by their IDs in this dashboard.

Dimensions

Dimension	Attribute	Definition
Article Links	Answer ID	The identifier of the answer.
	Article Locale	The locale to which the article belongs.

Dimension	Attribute	Definition
	DeletedFlag	The flags that are deleted from an article.
	Link Created By	The user who created the link to the article.
	Link Creation Date	The date on which the link is created.
	Reference ID	The reference identifier of the article link.
	Service Request ID	The identifier of the service request.
Time	Date	The date on which the article is linked.
	Day Name	The name of the day on which the articles are linked.
	Enterprise Period	The enterprise period in which the articles are linked.
	Enterprise Quarter	The enterprise quarter in which the article is linked.
	Enterprise Year	The enterprise year in which the article is linked.
	Month	The month in which the article is linked.
	Quarter	The quarter in which the article is linked.
	Week	The week in which the article is linked.
	Year	The year in which the article is linked.
Time- Additional Attributes	Calendar Date	The date of the time period.
	Calendar Month	The identifier of the calendar month.
	Calendar Month End Date	The end date of the calendar month.
	Calendar Month Start Date	The start date of the calendar month.
	Calendar Quarter	The identifier of the calendar quarter.
	Calendar Quarter Start Date	The start date of the calendar quarter.
	Calendar Quarter End Date	The end date of the calendar quarter.

Dimension	Attribute	Definition
	Calendar Week	The identifier of the calendar week.
	Calendar Week Start Date	The start date of the calendar week.
	Calendar Week End Date	The end date of the calendar week.
	Calendar Year	The number identifier of the calendar year.
	Calendar Year Start Date	The start date of the calendar year.
	Calendar Year End Date	The end date of the calendar year.
	Day of Month	The day of the month.
	Day of Week	The day of the week.
	Day of Year	The day of the year.
	Enterprise Period End Date	The end date of the enterprise period.
	Enterprise Period Number	The identifier of the enterprise period.
	Enterprise Period Sort Order	The sort order
	Enterprise Period Start Date	The start date of the enterprise period.
	Enterprise Quarter End Date	The end date of the enterprise quarter
	Enterprise Quarter Number	The number identifier of the enterprise quarter
	Enterprise Quarter Start Date	The start date for the enterprise quarter
	Enterprise Year End Date	The end date of the enterprise year
	Enterprise Year Number	The number of the enterprise year
	Enterprise Year Period Number	The period of the enterprise year
	Enterprise Year Start Date	The start date of the enterprise year
	Offset Week	The week that can be compared to the previous week

Dimension	Attribute	Definition
	Week By Year	The week number of the year.
	Year By Week	The week day of the year.

Facts

Fact	Attribute	Definition
Article Links Facts	# of Article Links	The number of article links.

Article Category Real Time Subject Area: Explained

The Article Category Real-time subject area contains information about the categories that articles be-long to. This subject area displays one-to-many relationship from an article to categories.

Dimensions

Dimension	Attribute	Definition
Service Category	Base Service Category ID	The identifier of the category to which the base service belongs.
	Base Service Category Name	The name of the category to which the base service belongs.
	Base Unit ID	The identifier of the business unit.
	Fixed Hierarchy Level	The level of the fixed hierarchy
	Level 1 Service Category ID	The identifier of the service category available at level 1.
	Level 1 Service Category Name	The name of the service category available at level 1.
	Level 2 Service Category ID	The identifier of the service category available at level 2.
	Level 2 Service Category Name	The name of the service category available at level 2.
	Level 3 Service Category ID	The identifier of the service category available at level 3.

Dimension	Attribute	Definition
	Level 3 Service Category Name	The name of the service category available at level 3.
	Level 4 Service Category ID	The identifier of the service category available at level 4.
	Level 4 Service Category Name	The name of the service category available at level 4.
	Level 5 Service Category ID	The identifier of the service category available at level 5.
	Level 5 Service Category Name	The name of the service category available at level 5.
	Level 6 Service Category ID	The identifier of the service category available at level 6.
	Level 6 Service Category Name	The name of the service category available at level 6.
	Level 7 Service Category ID	The identifier of the service category available at level 7.
	Level 7 Service Category Name	The name of the service category available at level 7.
	Level 8 Service Category ID	The identifier of the service category available at level 8.
	Level 8 Service Category Name	The name of the service category available at level 8.
	Stripe	The stripe to which the category belong.
	Top Level Service Category ID	The identifier of the service category available at the top level.
	Top Level Service Category Name	The name of the service category available at the top level.

Facts

Fact	Attribute	Definition
Article Category Facts	# of Article Categories	The number of categories associated with a given article.

Article Product Real Time Subject Area: Explained

The Article Product Real-time subject area contains information about the products that articles be-long to. This subject area displays one-to-many relationship from an article to products.

Dimensions

Dimension	Attribute	Definition
Product	Article Catalog Hierarchy 1 Name	The name of the article catalog hierarchy at level 1.
	Article Catalog Hierarchy 2 Name	The name of the article catalog hierarchy at level 2.
	Article Catalog Hierarchy 3 Name	The name of the article catalog hierarchy at level 3.
	Article Catalog Hierarchy 4 Name	The name of the article catalog hierarchy at level 4.
	Article Catalog Hierarchy 5 Name	The name of the article catalog hierarchy at level 5.
	Article Catalog Hierarchy 6 Name	The name of the article catalog hierarchy at level 6.
	Article Catalog Hierarchy 7 Name	The name of the article catalog hierarchy at level 7.
	Article Catalog Hierarchy 8 Name	The name of the article catalog hierarchy at level 8.
	Article Catalog Hierarchy Base Level Name	The name of the article catalog present at the base level of the hierarchy.
	Article Catalog Hierarchy Top Level Name	The name of the article catalog present at the top level of the hierarchy.
	ItemDeleteFlag	The item is marked to be deleted
	OrderableFlag	The item is marked as ready to select.
	Part Number	The product's part number.
	ProdGroupDeleteFlag	The product group is marked to be deleted.

Dimension	Attribute	Definition
	Prod Group Effective End Date	The end date of the product group.
	Prod Group Effective Start Date	The start date of the product group.
	Product Description	The description of the product.
	Product Line	The line to which the product belongs.
	Product Name	The name of the product.
	Product Row ID	The row identifier of the product.
	Product Type	The type of product.
	Usage Code	Denotes which kind of product it is associated with. They can be Base usage, service usage, and HCM usage codes.

Facts

Fact	Attribute	Definition
Article Product Facts	# of Article Products	The number of products associated with the articles.

How can I Use Subject Areas to Answer Business Questions?

Knowledge managers can create personalized reports and analyses to view information related to a specific transaction. You can start building reports and analyses once you identify the business questions that you want to answer. Each knowledge subject area is built around a unique set of business questions for a particular context such as article counts on knowledge contents being published, linked to SRs and so on.

You can choose the appropriate facts and dimensions listed in a subject area to answer your business questions. Using different combinations of facts and dimensions, you can generate different types of reports.

The following table lists the business questions specific to each subject area:

Subject Area	Key Business Questions
Article Real Time	How many articles are available in the knowledge base? Which articles are published or unpublished?

Subject Area	Key Business Questions
Article Links Real Time	How many links exist between services requests and knowledge articles? Which articles are linked to the maximum number of service requests?
Article Category Real Time	Which category contains the highest number of knowledge articles? Which articles are linked to a category?
Article Product Real Time	Which products are associated with the most number of knowledge articles? Which articles are linked to a product?

Creating Personalized Reports: Procedure

Knowledge managers can create personalized reports using subject areas. You need to identify the dimensions, facts, and filters to generate a report. You can also select two subject areas that share common dimensions to add additional data to your report.

Note: Knowledge Analysts can only run the personalized reports that the Knowledge manager has created.

To create a personalized report:

1. From the Navigation menu, click **Tools** and select **Reports and Analysis**.

   The Reports and Analytics page opens.
2. Click **Create**, **Report**.

   The Oracle Business Intelligence home page displays the Create Report wizard.
3. To build the report on a subject area, click **Use Subject Area** and select the appropriate Subject Area from the drop-down list.
4. Click **Next** and select the **Page** and **Layout** options.
5. To create a chart or graph, drag and drop fields from the **Data Source** pane into the layout.

   Note: To add additional subject areas to this report, click Add/Remove icon and select another subject area.
6. Click **View Report** to run and view the report and **Customize Report Layout** to modify the report.
7. Click **Finish** and select the folder destination to enter a **Name** and **Description** for the report and then click **OK**.

   The report is created.

Creating Personalized Analyses: Procedure

As a Knowledge Manager, you can create an analysis using subject areas.

> **Note:** Knowledge Analysts can only run the personalized analyses that the Knowledge manager has created.

To create an analysis:

1. Click **Tools**, **Reports and Analysis**.

   The Reports and Analytics page appears.
2. Click **Create**, **Analysis**.

   The **Select Subject Area** window displays.
3. Select the subject area check box and click **Continue**.

   The **Create Analysis: Select Columns** pane lists all the available columns, facts, and attributes.
4. Expand the subject area and add columns to the analysis and then click **Next**.

   The **Create Analysis: Select View** pane lists the table, graph, and layout options available.
5. Enter a **Title** for the analysis and select the Table, Graph, and Layout options from the drop-down lists.

   > **Note:** You can **Preview** the analysis and edit the table and graph layouts.

6. Click **Next**.

   The **Create Analysis: Sort and Filter** page opens.
7. To filter the report, follow these steps:

   a. Click **Add Sort** and select a column to sort the analysis in a specific order.
   b. Click **Add Filter** and select the column.
   c. Select the **Operator** from the drop-down list and enter the filter **Value**.

      The drill-down for the analysis appears.
   d. Additionally, you can apply conditional highlight formatting to the analysis in the **Create Analysis: Highlighting** page.
8. Enter the **Analysis Name**, **Description**, and select the destination folder where you want to save the analysis.

   > **Note:** Analysis saved in the **Shared Folders** location is visible to all the users. You can save the analysis in **My Folders** location for your personal use.

9. Click **Submit**.

   A **Confirmation** message appears that the analysis is saved successfully.

Searching for Reports and Analyses: Procedure

When you search for analytics, the search results include all your prebuilt and personalized dashboards, reports and analyses.

To locate an analysis or a report:

1. From the Navigation menu, click **Tools** and select **Reports and Analysis**.

   The **Reports and Analytics** page displays.
2. Click the **Hierarchical Selector** icon to filter the folder location.

   The All Folders catalog is selected by default.
3. To filter the search results, select the filter type and enter the name of the report or analysis in the search text field. You can also click **Clear Filter** to reset the filters.
4. Click the **Search** icon.

   The search results that match your criteria appears.
5. Click the **star** icon.

   The analytic is added to your favorites list.

Sharing Analytics

You can share the analytics that you have created with other users as a briefing book. A briefing book consists of dashboard pages, reports and analyses. To generate a briefing book, you need to select the analytics, add the contents to the book and save it to the BI catalog. You can download the briefing book in PDF or HTML formats and share it with the other users.

To add contents to a briefing book and share it with others, you can use the procedure explained in the Oracle Sales cloud Creating and Administering Analytics guide.

Related Topics

- Printing and Sharing Analytics: Overview

7 Managing the Search Dictionary

Managing the Search Dictionary: Explained

You can use the Manage Search Dictionary tool to view, edit, and add concepts and synonyms to the dictionary. You can add terms that are important to your organization and your users, including specific products and services, as well as the synonyms (acronyms, abbreviations, alternative names, and legacy names) that agents, customers, and authors might use when searching for answers to questions.

The dictionary enables search users to quickly and easily find answers in the knowledge base without knowing specific terminology or how the content is worded or organized. Search automatically matches users' questions to the best answer.

Concepts and Synonyms: Overview

A concept is an important term used in your organization or by your users. Concepts include products, services, and other terms that have specific meaning in your industry. Concepts have synonyms, which are words that have similar meanings, and also abbreviations, acronyms, legacy names, or other alternative names that people might use when seeking answers to questions. For example, the concept **plan** in your industry and organization might include the synonyms **agreement** and **proposal**. The dictionary treats concepts and their synonyms as a single object.

When you implement Knowledge, the dictionary already includes many common and industry-specific concepts and their synonyms. In addition, it automatically creates concepts for the products defined in your product hierarchy.

You can update the dictionary by adding new concepts and synonyms, and by modifying existing concepts and synonyms to ensure that search is matching your users' questions to the best answers in the knowledge base. For example, adding synonyms to automatically created product names can help answer users' questions about those products when they use abbreviations, acronyms, or other alternative terms. Knowledge analytics can also help you identify possible dictionary updates to improve search accuracy.

Listing Concepts: Procedure

You can list the automatically created product concepts and any concepts that you have updated or added to the dictionary.

To list these concepts, do the following:

1. Sign in to the application, and from the navigator, click **Setup and Maintenance**.
2. From the **Setup** drop-down list, select the **Service** offering.
3. Select **Knowledge Management** from the functional areas, and then select the **Knowledge Management Search Dictionary** task.

   The Manage Search Dictionary page displays the product concepts and concepts that your organization has created or modified.

Note: The dictionary is organized by language, not by locale. All locales based on the same language use the same set of dictionary concepts and synonyms.

Finding Concepts: Procedure

You can use the Find feature to locate concepts.

To locate concepts, do the following:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. In the Manage Synonyms pane, enter a concept, or a partial concept name, in the **Find** text field.
3. Click the search icon.

   The search results display concepts that match your search criteria in all your active languages. The search results include enabled and disabled concepts.

Adding Concepts and Synonyms: Procedure

You can add concepts to the search dictionary. You can also add, update, and delete synonyms for existing concepts.

To add concepts and synonyms:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. Click the + symbol in the **Manage Search Dictionary** page.
3. Complete the fields **Concept Name** and **Description**.
4. To add a synonym, click the + symbol in the **Concept Details** window.
5. Enter the **Synonym** name and select the **Language** from the drop-down list and save it.

Note: You can add synonyms only for your active languages.

Updating Concepts: Procedure

You can update concepts and synonyms, and enable or disable concepts. Search ignores disabled concepts when matching users questions to the articles in the knowledge base.

To update a concept, do the following:

1. Locate and double-click on the concept to open the **Concept Details** window.
2. Edit the concept description in the **Description** text box if desired.
3. Add or edit synonyms as desired.
4. Click **Save** or **Save and Close** to update the changes.

To enable or disable a concept, do the following:

1. Locate and double-click on the concept to open the **Concept Details** window.

2. Click on the check box to change the state of the concept.
3. Click **Save** or **Save and Close** to update the changes.