Oracle

Engagement Cloud

Using Knowledge

Release 13 (update 17D)

ORACLE

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Release 13 (update 17D)
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Contents

Preface

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

Oracle Applications Help

Use help icons to access help in the application. If you don't see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using 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

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1 Implementing Knowledge in Engagement Cloud

Implementing Knowledge: Overview

When you have implemented Engagement Cloud, you can then implement Knowledge for your organization to enable authors to create and manage knowledge articles. Service representatives can then use knowledge 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 who have implemented Engagement Cloud must use qualified accounts to implement Knowledge. Qualified implementation user accounts must have sales administrator, customer service manager, and knowledge manager roles assigned.

Note: The task of configuring the Knowledge integration user must be performed using the exact service administrator credentials issued by Oracle when the service was initially provisioned.

This chapter contains the following topics:

- Enabling Knowledge Access to Users, Products, and Categories: This topic explains how to create and configure the integration user that is required to enable Knowledge to access Engagement Cloud user, product, and category data.
- Enabling Knowledge in Service Requests: This topic describes how to make Knowledge available within service requests.
- Enabling Knowledge Features: This topic describes how to enable Knowledge features such as filtering search results by category or linking articles to service requests.
- Adding Locales to the Knowledge Repository: This topic describes how to add locales to your repository.
- Granting Knowledge Roles to Users: This topic describes how to enable users to create or manage Knowledge content.

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

Enabling Knowledge Access to Users, Products, and Categories: Procedure

You must configure your instance of the Knowledge Application to enable access to Engagement Cloud user, product, and category information.

You enable Knowledge to access user, product, and category information by:

1. Creating the Knowledge integration user.
2. Configuring the integration user for Knowledge.

Note: The function of the Knowledge integration user is to provide access for the Knowledge application. You should provide details for this user, such as an e-mail address, employer, and business unit that correspond to an existing staff member who can assume responsibility for this functionality.

Creating the Knowledge Integration User

You must create the knowledge integration user to enable Knowledge to access the required user, product, category, information.

1. Sign in as the implementation user.
2. Create the integration user with the following attributes:
   - Name: km_integration_user
   - Resource Role: Sales Administrator
   - Job Roles: employee, resource, sales administrator, customer service manager, knowledge manager, human resource help desk administrator

     Note: Selecting Auto-provision may add the required job roles.
3. Save the user information.

   The application sends a confirmation e-mail to the specified address.
4. Navigate to Tools, Scheduled Processes.
5. Run the Import User and Role Application Security Data job.

Configuring the Integration User for Knowledge

You configure the knowledge integration user by specifying the integration user credentials on the Knowledge Authoring system configuration page. You must use a specific account to configure the integration user:

- If you are implementing Knowledge as part of a new order, sign in with the exact service administrator credentials issued by Oracle when the service was initially provisioned. The service administrator account must have the customer service manager and knowledge manager roles to perform this configuration. Add these roles to the service administrator account if needed.
- If you are implementing Knowledge as part of an update order, sign in as the integration user (km_integration_user) to configure the integration user.

Configure the integration user as follows:

1. Click **Tools** tab in the Authoring menu.
2. Select System, Configure from Tools menu and then select Integration Configuration.
3. Enter the integration user name (km_integration_user), and password in the Integration User and Password fields.
4. Test the configuration using the Test Configuration option.

Enabling Knowledge in Service Requests: Procedure

You can enable Knowledge so that agents can use recommended answers and search for additional knowledge from within Service Requests. To enable Knowledge in Service Requests:

1. From the Navigation menu, select **Setup and Maintenance**.
2. Enter **Knowledge** in the **Search** box.
3. Click **Manage Service Request Knowledge Profile Options**.
4. Select **Yes** as the **Profile Value** for the **SVC_ENABLE_KNOWLEDGE_IN_SR** profile.
5. Click **Save and Close**.

Enabling Knowledge Features: Procedure

You can enable and disable various Knowledge features, such as the ability to filter search results by category and product. Each Knowledge feature is controlled by an application profile. For most new implementations, these profiles are set to Yes by default, which makes the Knowledge features automatically enabled.

To enable Knowledge features:

Note: You must have the Sales Administrator role to enable or disable Knowledge features.

1. Select **Setup and Maintenance**.
2. Type Manage Administrator Profile Values in the search box and click the **Search** button.
3. Double-click the **Manage Administrator Profile Values** link.
4. In the Manage Administrator Profile Values page, in the Profile Option Code field, enter CSO.
5. Click the **Search** button.

The following table shows the profiles you can set for the Knowledge pane. The default value is Yes. If you do not want a particular profile, select No.

Profile	Description
CSO_ ENABLE_ CATEGORY_ FILTER	Exposes category filters for search and recommended results.
CSO_ ENABLE_ HCM_KMHOME	Exposes menu items that appear on the My Knowledge pane.
CSO_ ENABLE_ KNOWLEDGE_ FAVORITING	Exposes a list of favorites on the Knowledge pane.
CSO_ ENABLE_ KNOWLEDGE_ LINKING	Links Knowledge articles to a service request.
CSO_ ENABLE_ LOCALE_FILTER	Exposes locale filters for search results.
CSO_ ENABLE_ PRODUCT_ FILTER	Exposes product filters for search results.

Profile	Description
CSO_ ENABLE_ SVC_KMHOME	Exposes the My Knowledge menu for Service Cloud.
CSO_ RECENTLY_ UPDATED_ TIME_PERIOD	Exposes time period display for recently updated articles.
CSO_ SHOW_ ARTICLE_ SNIPPET	Exposes article snippet in search and recommendation results.

Granting Knowledge Roles to Users: Procedure

You can provide your users with access to create or manage content in Knowledge 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 a knowledge program. 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 a knowledge role to users.

1. From the Navigation menu, select **Setup and Maintenance**.
2. Type Manage Users in the **Search** box.
3. Click **Manage Users**.
4. In the search results, click the add icon.
5. In the Create User form, complete the required fields and select the role as follows:

    a. For Role Request, click **Add Role**.
    b. Search for the role you want to add and select it from the list.
    c. Click **OK**.
6. Click **Save and Close**.

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 and easily 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 are 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.

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.

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 cannot insert knowledge as text from the Knowledge pane, if the article is:
> - 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 appear with the latest message on the top. 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 need to 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. **Send** the message, 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

Finding Articles: Procedure

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

> **Note:** Search results appear in the locale specified in your language and territory preferences. If Knowledge does not support your preferred language, the application prompts you to select any language from the **Locale** drop-down list.

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** below **Knowledge** in the Navigator panel.

From the Authoring page, you can create and manage the articles. Authorized users can also access additional features to manage users, repository, and batch jobs.

Knowledge Articles: Explained

Articles are the basic units of the knowledge base. You can create and manage FAQs and solutions within the knowledge base, periodically update them, translate them into supported locales, unpublish them to remove them from use, and delete them when they're no longer needed. Agents can use knowledge base articles to find solutions to customer issues and link articles to customer incidents.

About Articles

Articles are the basic units of the knowledge base. You can create the following types of articles:

- FAQ
- Solutions

The articles list displays the following information for each article:

- Whether the article is a master document (original article) or a translated document.
- The article ID and master identifier (short description that applies to master documents and their translations).
- Publishing status.
- Article version.
- The user who last updated the article.
- The date that the article was last updated.

You can select an article to view details about its publishing status, relevant products and categories, and other information.

Filtering and Sorting Articles List

You can filter the list of articles on the Authoring page to narrow the list of articles. To filter the list:

1. Select a menu to filter by:
    - Article status or properties
    - Locale

2. Select the value that you want to apply to the list.

To sort the list:

1. Select whether to sort the list in ascending or descending order.
2. Select the article property that you want to sort by.

Article Publishing Statuses

The article list provides the publishing status of each article.

The following table describes the statuses that articles can have.

Status	Meaning
Live	The article is published and available to all users who have privileges to view it. Only one version of an article, for each locale, can be active at any one time. The status includes the version of the article that is currently active.
Unpublished	The article is not yet published, or has been removed from publication.

Viewing Article Properties

When you view the details of an article, you can select to view the article's properties.

The following table describes the article properties.

Property	Meaning
Displayed Version	The version of the article that you are currently viewing.
Live Version	The version of the article that is currently published. This version may be different from the one that you're viewing.
Master Locale	The locale in which the original document for this article was created.
Document ID	The article's identifier.
Products and Categories	The products and categories that the article relates to.

Viewing Article Information

When you view the details of an article, you can select to view the article's information.

The following table describes the article information.

Information	Meaning
Owner	The user who creates an article automatically becomes the article's owner. Authorized users and administrators can change an article's owner.
Created	The user who created the article and the date on which it was created.
Last Modified	The user who last updated the article and the date on which it was last updated.

Managing Articles: Procedure

You can create articles, and edit existing articles in the knowledge base. When you edit an article and save your changes, you have the options to save the article as a draft, publish the article, or save the article as a new article.

Creating Articles

You can select the appropriate content type and complete the content and metadata fields to create an article.

To create an article:

1. Click the **Content** tab on the **Authoring** page.
2. Select **Add** below the type of article that you want to create.
3. Complete the fields for the selected article on the **Add FAQ** or **Add Solution** page.

Selecting Content Types

Content type is the type of article that you can create in your knowledge base. Each content type contains defined fields that you can use to create the article's contents. Content types also define important metadata about each article that is also stored in the knowledge base.

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

- FAQ
- Solution

Creating FAQs

Frequently asked questions (FAQs) include a summary statement, a question, and an answer. You can use the Authoring text editor to format the information in each section. You can also add categories and products to the article to help users find information related to specific categories and products.

To create an FAQ:

1. Select **Add** below **FAQ**.

   The **Knowledge Advanced** displays on the **Add FAQ** page.
2. Enter the FAQ content.
   - Enter a summary statement or title.

- Enter the question that the FAQ addresses.
- Enter the answer to the question.

3. Add categories and products to the article as needed.
4. Select:
    - **Save and Publish Document** to publish the article.
    - **Save Document** to close the article and save it as an unpublished draft.
    - **Save and Continue Editing** to save your work and continue editing the article.
    - **Cancel** to discard the draft FAQ. No article is created

Creating Solutions

Solution is an article that provides detailed information about a specific issue that may affect customers. Solutions consist of a summary statement, an issue, a resolution, and information about the environment and the cause. You can use the Authoring text editor to format the information in each section. You can also add categories and products to the article to help users find information related to specific categories and products.

To create a solution:

1. Select **Add** below **Solution**.
2. Enter the solution content.
    - Enter a summary statement or title.
    - Describe the issue.
    - Provide information about the environment in which the issue occurs.
    - Provide information about the cause of the issue.
3. Select:
    - **Save and Publish Document** to publish the article.
    - **Save Document** to close the article and save it as an unpublished draft.
    - **Save and Continue Editing** to save your work and continue editing the article.
    - **Cancel** to delete the draft solution. No article is created.

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 instantly visible 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 instantly visible 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. Select **Add** to move the product to **Selected Products**.

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

Editing Articles

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.
3. Select:
    - **Save Document** to close the article and save it as an unpublished draft.
    - **Save and Publish Document** to publish the article.
    - **Save and Continue Editing** to save your work and continue editing the article.
    - **Cancel** to discard your changes.

Article Versions: Explained

Knowledge assigns version numbers to articles as major and minor values, separated by a decimal point. 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 Two Versions of an Article

You can compare a selected version of an article to any other versions of the same article. You compare article versions by selecting the version of interest, then selecting the version to compare it to in a parallel view.

To compare an article to a previous version:

1. Open the article that you want to compare. You can open a previous version of an article by selecting **History** in the information section of the article.
2. Select **Side by Side View** in the information section.

The **Side by Side View** page displays the article you selected, and the latest alternate version of the article. You can use the menu to compare other versions.

Reverting an Article to a Previous Version

You can revert an article to a previous version displayed in the history list as follows:

1. Select a version of the article from the list in the Content History page.
2. On the Properties tab, select Revert to this version.

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 view page. To publish an article when creating or editing, select the **Save and Publish Document** option. To publish a previously saved draft article, open the article details, then select **Publish This Version** in the article's Properties.

To unpublish an article, open the article details, then select **Unpublish this Version** in the article's properties.

Translating Articles: Procedure

You can translate articles to any locale that is supported in the knowledge base, and that you have privileges to work in. When you translate an article, 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, then select the locale that you want to translate to in the article's Translate area.
2. Enter the translated content in the new article template. You can select **Copy All from Source** to copy the contents of the original article into the new translation.
3. Save the article as a draft, or publish the article.

5 Administering Knowledge

Administering Knowledge: Explained

Authorized users can access the **Repository and Tools** tabs to view information about:

- Users
- Repository
- Categories and products
- Content types
- Batch jobs

The **Repository and Tools** tabs also provide access to manage the supported locales for the knowledge base and user content locales.

Viewing Repository Objects

The repository contains knowledge articles and associated metadata. You can view repository properties, categories, products, and content types that are available in the knowledge base.

Managing Knowledge Locales

You can view and manage supported knowledge locales on the Repository Properties page. Locales designate a language and a specific country or region, such as English, United States compared with English, Australia. Locales provide more accurate support for languages that vary in usage and meaning in different countries and regions.

A repository has a default locale. When you create an article, the application creates the article in the default locale unless you choose a different supported locale. You can add support for additional locales by selecting them on the repository properties page.

Viewing Knowledge Batch Job Statuses

You can view the status of Knowledge batch jobs on the Repository Properties page. The Batch Job List shows whether jobs are currently active, and the date they were last executed. You can select a job to view its history.

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.

Adding Locales to Knowledge Authors: Procedure

You can add or remove locales for Knowledge users who create or edit articles. You can add multiple locales for an author.

Add locales to authors as follows:

1. Click the **User** tab.
2. In the Console page, select **Console Roles**, **List**.
3. Select a user from the list, and click **Edit User**.
4. From the Select Content Locales menu, select the locales.
5. Click **Save User Properties**, and then click **Done**.

The user can now create and translate articles in the selected locales.

Adding Locales to the Knowledge Repository: Procedure

You can add or remove supported locales for Knowledge articles in your repository. Locales designate a language and region, for example English, United States or English, Great Britain.

To add locales:

> **Note:** You must have the Knowledge Manager role to add locales to the repository.

1. From the Navigation menu, select **Knowledge**, and then click **Authoring**.

   The Authoring application loads.
2. Click the **Repository** tab.
3. In the Repository page, click **Repository**, and then select **Manage**.
4. In the Properties box, select **Edit Repository**.
5. In the Repository attributes page, select the desired locales from **Select Contents Locales**.
6. Click the **Save Repository Properties** link to save the locales.

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 a 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.

Access an active sandbox as follows:

1. Open the Settings and Actions menu by clicking the user icon on the My Knowledge page, and select **Manage Sandboxes**.
2. If a sandbox is active, add the tabs and publish as described below.
3. If no sandbox is active, activate a sandbox as described below.

Activating a Sandbox

Activate a sandbox as follows:

1. On the My Knowledge page, open the Settings and Actions menu by clicking the user icon, and then select **Manage Sandboxes**.
2. If a sandbox is active, proceed to add the tabs and publish. If no sandbox is active, select **Activate Sandbox** in the Sandbox Required dialog.

Note: If no sandbox exists, you must create one.

The sandbox is activated and the application home page appears.

Creating a Sandbox

Create a sandbox as follows:

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** on the warning dialog box.

The sandbox is created.

> **Note:** The sandbox is not automatically active, you need to activate it as explained earlier.

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.

How can I set article visibility?

You can assign articles to user groups to make them available to different audiences. Use the User Group Selection option in the article settings to set which users can view the article. Choose Internal to make the article accessible only to internal users. Choose External to make the article accessible to both internal users and customers.

If you do not select a user group, an article is available to both internal and external users.

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.