Oracle® Knowledge Management

Implementation Guide

Release 11i

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Oracle Knowledge Management Implementation Guide, Release 11i

Part No. A96664-01

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

This document is intended for IT professionals who are tasked with implementing Oracle's Knowledge Management .

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area

- Oracle's Knowledge Management

If you have never used Knowledge Management, Oracle suggests you attend one or more of the Oracle's Knowledge Management training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide.*

See the section Other Information Sources, for more information about Oracle Applications product information.

Typographic Conventions

This manual uses the typographic conventions listed in the following table:

Convention	Meaning
italic text	Book titles
Courier text	User commands, file content examples, directory names

Convention	Meaning
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
boldface text	Menu, button, keyboard, and form options, emphasis
< >	Angle brackets enclose user-supplied names.
	Note: Do not type the angle brackets.

Support Contact Information

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle's Knowledge Management and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers. You can also arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle's Knowledge Management working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs.

To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Oracle Support Services offers a comprehensive portfolio of focused services that support the IT infrastructure your organization needs to meet the demands of e-business. Powerful and easy to purchase, these services range from subscriptions for software updates to premium support that delivers flexible solutions tailored to specific business needs. For more information, navigate to http://www.oracle.com/support

Documentation Accessibility

Oracle's goal is to make our products, services, and supporting documentation accessible to the disabled community with good usability. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the Java and SQL*Plus code examples in this document. The conventions for writing Java and SQL*Plus code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle's Knowledge Management .

If this guide refers you to other Oracle Applications documentation, use only the Release 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle's Knowledge Management shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle's Knowledge Management .

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle's Knowledge Management (and any other Oracle Applications products). This guide also includes information on setting up user profiles, as well as running and reviewing reports and concurrent processes. You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Self Service Web Applications Implementation Manual

This guide contains overviews, task and reference information about Oracle Self–Service Web Applications.

Oracle Applications Messages Manual

This manual contains a listing of application messages that appear across the Oracle Applications product families.

Documents Related to This Product

Oracle CRM Technology Foundation Concepts and Procedures

This guide explains the setup and usage of Oracle CRM Technology Foundation features that Knowledge Management uses.

Oracle CRM Technology Foundation Implementation Guide

This guide provides information on setting up Oracle CRM Technology Foundation, a mandatory dependency for Oracle's Knowledge Management .

Oracle Inventory User's Guide

This guide provides information on setting up Oracle Inventory.

Oracle iSupport Implementation Guide

This guide details the implementation of Oracle iSupport.

Oracle8i interMedia Text Reference

This guide explains how to set up synonym files in Oracle8i interMedia, a necessary step to implement synonym product search functionality in Oracle's Knowledge Management .

Implementing Oracle CRM: ERP Functional Checklist, Release 11i

This document provides information on the functional flows of Oracle Enterprise Resource Planning (ERP) Applications when integrated with Oracle Customer Relationship Management products. It is available on Oracle MetaLink.

Implementing Oracle CRM: Foundation Functional Checklist, Release 11i

This document provides information on the functional flows of other Oracle Foundation Applications when integrated with Oracle Customer Relationship Management products. It is available on Oracle MetaLink.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7(NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i.

You cannot upgrade to Release 11i directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Other Implementation Documentation

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to implement CRM Application Foundation correctly.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources, and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction

This chapter provides an introduction to Oracle's Knowledge Management. The topics include:

- Oracle's Knowledge Management Overview
- New in this Release
- Obsolete in this Release
- Oracle's Knowledge Management Architecture and Technology

1.1 Oracle's Knowledge Management Overview

Oracle's Knowledge Management is a comprehensive internet information management system that utilizes Oracle-developed knowledge capture, storage, and distribution tools. Implementing Oracle's Knowledge Management provides the features of solution search, creation, organization, and immediate access to new solutions. Oracle's Knowledge Management provides focused results that more directly relate to the issues being researched, thus reducing the cost of providing service while increasing customer satisfaction and gaining an edge over competitors.

Oracle's Knowledge Management currently provides solution management functionality to other Oracle Applications like Oracle *i*Support, Oracle Support, Oracle Field Service, Oracle Depot Repair, and Oracle eMail Center. The architecture has been designed to support diverse use, and is expected to be used by other Oracle products.

All Knowledge Management users can search for published solutions in the Knowledge Management repository. The users can be segregated as internal and external or end users. External users can view and search published solutions. Internal users include customer service representatives (CSR), knowledge workers,

and Knowledge Management administrators. These users have various levels of setup and other process oriented permissions. To see the entire list of roles and permissions for internal users, navigate to Oracle's Knowledge Management Seed Data.

1.1.1 Oracle's Knowledge Management Features/Benefits

Oracle's Knowledge Management has the following features:

1.1.1.1 Integration With Other Oracle Applications

Knowledge Management is integrated with other Oracle Applications like Oracle iSupport, Oracle Support, Oracle Field Service, Oracle Depot Repair, and Oracle eMail Center. Users of all these applications can search the same knowledge base for solutions and contribute new solutions to the knowledge base.

1.1.1.2 Multiple Search Methods

Multiple search methods are available for searching in Oracle's Knowledge Management.

The search methods include intermedia text, or keyword searches. A query can consist of a single search term or multiple search terms, the latter separated by spaces.

Oracle's Knowledge Management uses InterMedia Text 8.1.7 for text searching.

1.1.1.3 Product, Platform, or Category Specific Search of Solutions

To focus search results, you can search for solutions under different products, platforms, or categories.

Product and platform fields on the Advanced Search screen allows a user to focus the search for solutions that contain the specific product and/or platform. The product and platform information is entered either from Oracle Support's service request module or a user can select from a list of values that are taken from Oracle Inventory.

Category selection allows a user to select a category or a subcategory to focus the search to a specific information area more easily and quickly than adding additional query statements.

1.1.1.4 Finding Matching Statements/Solutions

While creating a statement, you can find matching statements or solutions in the database to prevent duplication.

1.1.1.5 Finding Related Statements/Solutions

You can reuse statements in more than one solution. Finding related solutions/statements is the process of following the statement's reused links to locate other related solutions/statements.

1.1.1.6 Creating and Searching by Multiple Solution Types

Information in Oracle's Knowledge Management is organized into solutions, segmented into solution types. You can create multiple solution types and search by either symptom/cause/action (seeded) solution type or any custom solution type, such as problem/resolution, that you create.

1.1.1.7 Solution Authoring Features

Solution authoring functionality includes creating new solutions and updating existing solutions. Authors can also check solutions in and out of the knowledge base. For source control, only one internal user can edit a solution and/or statement at one time. An author can set up the access level for solutions and also create new solutions by reusing existing statements. The Knowledge Management system checks and prevents the creation of duplicate solutions or statements.

1.1.1.8 Categorization of Solutions

This allows the segregation of solutions in categories or folders for browsing or for performing a category specific search for solutions.

A merchant can categorize solutions for easy retrieval by its users. A user can select a category or a subcategory during search to focus the search to a specific information area.

1.1.1.9 Adding Attachments, External Links, and/or Comments to Solutions

This feature allows knowledge workers, customer service representatives, and Knowledge Management administrators to add supporting and related information, links to other objects, or comments to a solution to enhance its usefulness. Comments are used by solution reviewers as a communication channel.

1.1.1.10 User Defined Search Result Order

You can select the way in which the search results for solutions will be displayed in the results list. A user can define the following display criteria:

- Relevancy based on percent match. For example, only display solutions that match the query 90% or better

- Number of rows to be displayed per screen

You can also sort by Score, Type, Number, Title, Last Update Date in either ascending or descending order.

1.1.1.11 Solution Scoring

Each solution is scored based on the text match performed by InterMedia Text. This score is shown to indicate the strength of the match to the query entered. The maximum score is 100.

1.1.1.12 Integration with Oracle Workflow

Oracle Workflow integration provides a workflow process in Oracle's Knowledge Management to manage the solution approval and rejection process. It is a flexible method for Oracle's Knowledge Management users to define solution processing steps that are specific to their needs.

1.2 New in this Release

The following new features/functionality have been added in this release of Oracle's Knowledge Management:

- Search and Browse Integration
- Advanced Search to Create Solution Integration
- Obsoleting Statements
- Dynamic Information Linking
- Mandatory Statements in Solution Authoring
- Solution "Get Lock" By Knowledge Management System Administrators
- Improved Search For Solutions In Progress Screen
- Statement Content Type
- New Profile Options
- New Permissions
- Enhancements to Comments
- Statement Ordering
- Solution and Statement Import/Export Functionality
- External Links and Attachments at the Solution Level

Search and Browse Integration

Search and browse functionality have been integrated on the Basic Search screen. You can browse through various categories that have been setup and search for solutions interchangeably. During search, search results replace the browsing section.

On the Basic Search screen, for a selected category, the solutions appear at the bottom of the screen in a table. You can view solutions updated in the last "N" days. The values for the View drop-down list are populated from the values defined in the Frequently Used Definition screen.

Advanced Search to Create Solution Integration

A tighter integration between the Advanced Search screen and the Solution Detail screen has been implemented to enable the search parameters to be passed back and forth.

Obsoleting Statements

The procedure to obsolete statements has been implemented in this release of Knowledge Management. An obsolete statement does not appear in the result list during the statement search process. Statements need to be obsoleted if they are removed from a solution in the review process and are not linked to any other solutions.

In previous versions of Knowledge Management, when a solution was obsoleted, there was no way to obsolete the associated statements. These statements remained active in the knowledge base without being linked to a solution. This affected the statement search process. The statements that had no links to any solutions were also displayed during statement search. It also affected the solution creation process. The users creating a solution could select orphan statements that may not have been the appropriate ones to be used in new solutions.

Dynamic Information Linking

Dynamic information linking is the functionality that allows a solution author to select keywords or phrases within a solution and link them to external information. A user can select the word or phrase to display the information that the word or phrase in the solution is linked to. For example, a word or phrase may be linked to other bugs, other solutions, white papers, presentations, etc.

Dynamic linking functionality created in Oracle Quality Online will be used in Knowledge Management. To set dynamic links, see **Setting Note Token Rules** in the latest version of *Oracle Quality Online Implementation Guide*.

> **Note:** Dynamic links in Knowledge Management are known as Note Token Rules in Oracle Quality Online.

Mandatory Statements in Solution Authoring

A method to identify and add mandatory statement types in a solution type while creating a solution has been implemented. For this release of Knowledge Management, an asterix (*) is added to the left of each mandatory statement type in the statement type drop down list on the Statement Detail screen. The mandatory statements types to be included are determined by the Knowledge Management system from the solution type that you select. If all mandatory statement types are not included in a solution, then you can only save a solution that you can work on and complete later, but you will not be allowed to save and submit a solution to an authoring flow.

Solution "Get Lock" By Knowledge Management System Administrators

Knowledge Management administrators can get a lock for a solution, if the person who has locked the solution is no longer available to unlock it and complete the steps in an authoring flow. A Get Lock button and a Get Lock Confirmation screen have been added to the existing Solution Detail screen. A Get Lock button and the Get Lock Confirmation screen are only visible to a user who has CS_Solution_Get_Lock permission.

In the previous release, solution locking was implemented to prevent other internal users from editing a solution that was being worked on by a user.

Improved Search For Solutions In Progress Screen

A new drop down box with three options has been added in the Search For Solutions In Progress screen. The options are:

■   Solutions I'm Currently Working On

■   Solutions In Progress That I Can Check Out For Editing

■   All Solutions In Progress

Statement Content Type

A procedure to display the statement detail in the same format in which a solution author specifies, has been implemented. You can select the content type for the statement detail from the Content Type drop-down list on the Statement Detail screen. The options are:

■   Text: the content in the statement is rendered as text only. HTML tags are not rendered as HTML but as text.

■   HTML: the content in the statement is rendered as HTML.

■   HTML with Autolinks: is extensible HTML. The content in a statement is rendered as HTML and dynamic links are also displayed.

■   Text with Autolinks: the content in a statement is rendered as text and dynamic links are also displayed.

Note: the statement summary field can only include text. The content type selection applies only to the statement detail field.

New Profile Options

The following new profile options have been added in this release of Knowledge Management:

- Knowledge: Action for Positive Solution Feedback

- Knowledge: Knowledge Base Responsibility When Called From Another Application

- Knowledge: Default Authoring Flow Name

- Knowledge: Statement Display Order on Solutions Details Page

New Permissions

The following new permissions have been added in Knowledge Management:

Table 1–1   New Permissions and Descriptions

Permission	Description
CS_USED_COUNT_UPDATE	Knowledge: Search: Permission to update solution used count.
	Permission to see the number of times the Yes button is selected for the question: "Can This Solution Solve Your Problem?"
CS_SOLUTION_GET_LOCK	Knowledge: Authoring: Permission to get solution lock from user
	A Knowledge Management system administrator specific permission to unlock a solution that has been locked by another user. The primary use for this permission is for a system administrator to unlock a solution and put it back in the authoring flow, if a person who has locked a solution is not available to unlock it.
CS_Advanced_Search	Knowledge: Search: Permission to view the Knowledge Management Advanced Search screen.
CS_Solutions_Comments_Add	Knowledge: Authoring: Permission to add solution comments.
CS_Personal_Profile_Update	Knowledge: Other: Permission to update KNowledge management Personal Profile.
CS_Sol_Auth_Profile_Update	Knowledge: Authoring: Permission to update Solution Authoring Profile
CS_Workflow_Setup_Update	Knowledge: Setup: Permission to update solution authoring workflow setup

Table 1–1   New Permissions and Descriptions

Permission	Description
CS_Categories_Update	Knowledge: Setup: Permission to update categories

Enhancements to Comments

The following enhancements to improve comment processing have been implemented:

- A complete list of comments, comment titles, and dates as links are available from the Statement Detail screen. An Expand Comments button is also available to display all comments with title dates and details. This helps internal users to easily view and update comments while reviewing a solution.

- The method of attaching comments has been changed, so that comments are not removed when a new solution version is created. The new comment processing has the following flow:

    - Comments are attached to a solution through all its versions, leading to a new published solution.

    - Any new comments added to an already published solution are added to the work-in-progress (WIP) copy of the solution.

    - When the WIP copy of the solution is published, the original solution and the comments attached to it are obsoleted.

    - To access the previous versions of a solution, you can write and use a SQL report.

Statement Ordering

This feature controls the order in which statements are displayed in a solution. The *Knowledge: Statement Display Order on Solution Detail Page* profile option (at the site level) is used to specify an order.

Solution and Statement Import/Export Functionality

The functionality to import and export solution and/or statements to or from Knowledge Management has been implemented.

- **Import/Export Statement**: To Import and export statements, Import and Export buttons have been added on the Statement Detail screen. You can select the Import button to navigate and choose the source file (only text files) for the statement to be imported. Similarly, you can select the Export button to export

or download and save the statement being viewed. You can import or export one statement at a time in Knowledge Management.

- **Import/Export Solution**: Concurrent programs are used to import and export solutions in Knowledge Management. Knowledge Management Solution Export Program is used to export solutions from Knowledge Management and Knowledge Management Solution Import Program is used to import new solutions and to update existing solutions in Knowledge Management.

External Links and Attachments at the Solution Level

The functionality of attaching external links and attachments is now available from the Solution Detail screen only.

1.3 Obsolete in this Release

The following features/functionality have been obsoleted in this release of Oracle's Knowledge Management:

- Forms version of Knowledge Management has been obsoleted.

- MES tab is no longer available from the Knowledge Management user interface.

- You cannot view External Links from the Statement Detail screen.

- You cannot add an attachment to a statement.

- The Relationship drop-down list on the Statement Search screen has been removed.

- View History on the Solution Detail screen has been obsoleted.

1.4 Oracle's Knowledge Management Architecture and Technology

The hardware and software components required to implement Oracle's Knowledge Management largely depend on your particular installation, but the minimum requirements include:

1.4.1 Minimum Hardware Requirements

The suggested hardware configuration for Oracle's Knowledge Management is a series of Web servers in the front and a high performance database server machine in the back end. With global systems, the necessity for high performance database servers is even greater. Oracle recommends the following server requirements:

- ERP database server machine— high throughput at fast speed (CPU)
- Web servers running Apache for external customers
- One forms server for administration

You can determine the actual sizing of the machines after completing capacity planning.

Specific hardware requirements depend on the particular installation that you perform. The hardware requirements listed in the following table are guidelines only, and assume a single-node environment.

Table 1–2   Minimum Hardware Requirements

Hardware	Requirement
CPU	Minimum of two CPUs. Four or more are highly recommended.
Memory	Minimum 256 MB. 1GB or more is highly recommended.
Disc Space	22 GB, including 1GB in /tmp (plus an additional 9GB if installing from a staging area)

1.4.2 Minimum Software Requirements

The minimum software requirements are listed in the following table.

Table 1–3   Minimum Software Requirements

Software	Requirement
Database	8.1.7 version of Oracle8i
Middle Tier	The middle-tier requirements are an Apache 3.0 version Web server and Oracle Forms 6.0 server (as a part of Oracle ERP 1*i* implementation). For faster page serving, you can also use a caching server in front of the Web server series. The caching server (for example, Calypso) then serves the static content through the cached TCP/IP packets (or cached pages). An invalidated cache results in service requests being directed to the Web servers.

1.4.3 Browser Requirements

It is recommended that you use Internet Explorer 5.5 as your default browser. Netscape Navigator 4.75 and above can also be used but you may experience some Java problems.

2

Before You Begin

This chapter includes the following topics:

- Related Documentation and Training
- Oracle's Knowledge Management Dependencies
- Dependency Setup Checklist

2.1 Related Documentation and Training

Refer to the latest versions of the following manuals for more information about Oracle's Knowledge Management and the related products/modules:

- *Oracle's Knowledge Management User Guide*
- *Implementing Oracle CRM:ERP Functional Checklist*
- *Oracle Applications Developer's Guide*
- *Oracle CRM Application Foundation User Guide*
- *Oracle CRM Application Foundation Implementation Guide*
- *Oracle CRM Technology Foundation User Guide*
- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle iSupport User Guide*
- *Oracle iSupport Implementation Guide*
- *Oracle Support User Guide*
- *Oracle Support Implementation Guide*
- *Oracle eMail Center User Guide*

- *Oracle eMail Center Implementation Guide*

- *Oracle Depot Repair User Guide*

- *Oracle Depot Repair Implementation Guide*

- *Oracle Quality Online User Guide*

- *Oracle Quality Online Implementation Guide*

- *Oracle Workflow Guide*

- *Oracle Field Service User Guide*

- *Oracle Field Service Implementation Guide*

2.2 Oracle's Knowledge Management Dependencies

2.2.1 Mandatory Dependencies

Oracle's Knowledge Management integrates with other Oracle application modules to provide and extend its functionality. You have to set up the mandatory modules for Oracle's Knowledge Management to run. The following list includes the mandatory modules for using Knowledge Management:

1. Access Application

2. Oracle Application Object Library

3. Oracle CRM Technology Foundation

4. Oracle InterMedia Text

5. Oracle Human Resources

6. Oracle CRM Application Foundation's Task manager and Resource Manager

Access Application

Knowledge Management is not a stand alone application. Users can access Oracle's Knowledge Management from any of the following applications:

- Oracle *i*Support

- Oracle Support

- Oracle eMail Center

- Oracle Field Service

- Oracle Quality Online
- Oracle Depot Repair

Oracle Application Object Library

Oracle Application Object Library (AOL) is a collection of pre–built application components and facilities for building and adding extensions to Oracle Applications. It is a required dependency of all Oracle Application modules. Knowledge Management uses AOL to access all standard application library objects e.g, users, menus, responsibilities, and profile options. For more information, see the latest version of *Oracle Applications Developer's Guide.*

Oracle CRM Technology and Application Foundation

CRM Foundation 11*i* suite of applications supplies much of the infrastructure that underlies Oracle CRM applications, and hence is integral to Oracle's Knowledge Management.

The Oracle CRM Foundation software suite is comprised of two distinct but interrelated groups: CRM Technology Foundation and CRM Application Foundation.

2.2.6.1 CRM Technology Foundation

Oracle's CRM Technology Foundation (JTT) provides Java-based infrastructure software that is used to develop e-business solutions such as Sales, Marketing, Service, E-Commerce, Contracts, and Interaction Center applications. It offers a common platform for developing applications with HTML, XML, and Java. CRM Technology Foundation also provides user-friendly screens for centralized setup and administration. This web-based interface is called the System Administrator Console. The CRM User Management Framework documentation can be found within the documentation for this group.

Setting Up Oracle CRM Technology Foundation Profile Options

Confirm the setup of the Oracle CRM Technology Foundation profile options. Refer to the latest version of *Oracle CRM Technology Foundation Implementation Guide* for more information. The CRM Technology Foundation stack is also known as the HTML Stack or Tech Stack.

For more information, see:

- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle CRM Technology Foundation User Guide*

Oracle InterMedia Text

You must set up Intermedia Text to use Oracle's Knowledge Management's search functionality.

InterMedia Text (iMT) provides integrated management of free text stored in the database, on websites, or on file systems. It extends the Oracle SQL query language to provide content-based search and to retrieve information from formatted documents and free text. This allows you to access a number of advanced text search capabilities from any SQL tool or interface.

InterMedia Text (iMT) 8.1.7 has features that improve index performance and ease-of-use. iMT also has features that are targeted in two key areas:

- Structured documents
- Multi-lingual databases.

For more information about InterMedia Text, navigate to:

- *http://www.oracle.com/intermedia/ (external and internal users)*
- *http://otn.oracle.com/products/intermedia/index.htm (internal users)*

Oracle Human Resources

Oracle's Knowledge Management uses Oracle Human Resources to get employee data. Define or confirm the definitions of your employees in Oracle Human Resources Management System. For Oracle Human Resources Management System documentation, refer to the following titles available on MetaLink:

- *Implementing Oracle HRMS*
- *Using Oracle HRMS - The Fundamentals*
- *Managing People Using Oracle HRMS*
- *Customizing, Reporting and System Administration in Oracle HRMS*
- *Managing Total Compensation Using Oracle HRMS*

Oracle CRM Application Foundation's Task Manager

All Oracle CRM products use Oracle CRM Application Foundation's Task Manager for task management capabilities. It provides an effective way for organizations to respond to customer's needs in time. Use the Task Manager to create, assign, schedule, prioritize, and manage all your tasks. You can access the Task Manager to create your tasks or to view your tasks. It can be used from other Oracle modules to provide integrated solutions or it can be used as a stand-alone product.

If you refuse a task or reassign a task to another employee, the task can generate a series of notifications for other users or managers. Tasks not performed in a specific time period can be set to go through an escalation process. Refer to the latest version of *Oracle CRM Application Foundation User Guide* for more information.

Oracle CRM Application Foundation's Resource Manager

Resource Manager module is used in Knowledge Management to set up the various resource groups for authoring flows. The Resource Manager provides lists of resources, as individuals, groups, and teams, for applications to access and manage their resources. Resources are defined as employees, supplier contacts, parties, and partners that are used by the different CRM modules to accomplish business objectives. You can use Resource Manager to import and view resources, define resources, define roles and role types, create teams and groups, and organize resources within those teams and groups. Defining and organizing your resource information makes your resources available to the connected application modules for work action. Resources can be organized into groups and teams. Each group or team can be defined in one of two ways, a role, or a role type.

2.2.2 Conditional Dependencies

The following Oracle CRM Application Foundation modules can be set up to provide additional functionality:

1. Notes Module of CRM Application Foundation

2. Oracle Workflow

3. Oracle Inventory

2.2.6.2 CRM Application Foundation

Oracle's CRM Application Foundation (JTA) consists of the following CRM applications: Territory Manager, Resource Manager, Notes, Calendar, Task Manager, Interaction History, Fulfillment, Assignment Manager, and Escalation Management. Documentation for this application group also includes information on using Spreadtables and TCF Servers for Gantt. For more information, see:

- *CRM Application Foundation Implementation Guide*

- *CRM Application Foundation User Guide*

Notes

The Notes module is used in Knowledge Management to map statement types to note types. The Notes module enables the entire CRM suite to create, maintain, and share notes related to customers, opportunities, service requests, and other business tasks. The Notes module allows you to capture extensive textual, project relevant information within Oracle CRM applications. Notes module is seeded with predefined Note Types.

Oracle Workflow

Business processes today involve getting many types of information to many individuals. Oracle Workflow allows you to automate and continuously improve business processes by routing information of any type, according to easily changed business rules, to people both inside and outside your enterprise. See the latest version of the *Oracle Workflow Guide* for more information.

Oracle Workflow provides a workflow process to Oracle's Knowledge Management for solution approval and rejection processes. It is a flexible method for Oracle's Knowledge Management system administrators to define solution processing steps that are specific to their needs.

Oracle Inventory

Oracle's Knowledge Management uses Oracle Inventory to get the product and platform lists that are used to categorize solutions during solution search or solution creation. For more information on Oracle Inventory, see the latest version of *Oracle Inventory User's Guide*.

The following profile options have to be set for selecting product and platform items from Inventory:

- Knowledge: Default Knowledge Base Product Category Set

- Service: Default Platform Category Set- determines the default platform category set for a service request.

2.2.3 Dependency Setup Checklist

The following table lists the suggested steps for setting up Oracle's Knowledge Management dependencies. You must perform the required steps. You need to perform the optional steps only if you plan to use the related features or complete certain business functions.

Table 2–1 Dependency Setup Checklist

Step	Required/Optional
Install Software	Required
Set Up Oracle Application Object Library	Required
Set up Oracle Human Resources	Required
Set Up Oracle Inventory	Optional
Set Up Oracle Workflow	Optional
Set Up Oracle Intermedia Text	Required
Set Up an Access Application	Required
Set Up Oracle CRM Technology Foundation	Required
Set Up Task Manager	Required
Set Profile Options for Knowledge Management	Required
Set Up Oracle's Knowledge Management	Required

Using the Oracle Application Implementation Wizard

Use the Oracle Application Implementation Wizard (AIW) to coordinate dependency setups and identify the steps required to implement Knowledge Management. You can use the AIW to see the graphical overview of the steps involved, read online help on set up, and open the appropriate forms. You can also document your actions for further reference and review. Refer to *Oracle Application Implementation Wizard User's Guide* for more details.

Accessing Oracle Forms

Some setups for Oracle's Knowledge Management and its dependencies require that you use Oracle Forms. Launch Oracle Forms by navigating to:

http://<host>:<apache port>/

Select Apps Logon Links > VIS Logon through the Forms cartridge. When Oracle Forms launches, log in with the appropriate user name and responsibility to perform the required tasks.

2.3 Installation and Dependency Verification

Before you start configuring the profile options and search for solutions or create solutions in Knowledge Management, check that you have completed the following prerequisites.

1. Verify that the installation and middle tier setups have been done correctly. Once the Rapid Installer Wizard finishes the installation, verify the proper installation and configuration of the following components:

   - Apache Server: Go to *http://<host>:<apache port>/apachedocs/.* You should see the Apache Server documentation page.

   - Apache JServ: Go to *http://<host>:<apache port>/servlets/IsItWorking.*

   You should see a message verifying that Apache JServ is working.

2. Verify that the ERP applications are installed and functioning properly. Refer to the latest version of *Implementing Oracle CRM: ERP Functional Checklist, Release 11i* document available on Oracle MetaLink for a description of the tasks required.

3. Verify that the dependency setup has been done correctly.

3

Implementation Overview

This chapter provides a process overview about Oracle's Knowledge Management users. The topics include:

- Process Overview

3.1 Process Overview

Oracle's Knowledge Management has both internal and external users. All users can search for published solutions in the Knowledge Management repository. Each type of user in Oracle's Knowledge Management has a pre defined set of permissions.

Roles determine screen-level permissions. Responsibilities determine the menus that a user will be able to view.

- External users are end users who only have view and search access to published solutions.
- Internal users include Knowledge Management agents, Knowledge Management workers, and Knowledge Management system administrators.

The following table lists responsibilities, menus, and tabs associated with internal Knowledge Management users.

Table 3–1 Responsibilities, Menus, and Tabs for Internal Knowledge Management Users

Responsibility	Description	Menus	Tabs
CS_KB_ KNOWLEDGE_ WORKER	Creates, edits, and technically reviews information in Knowledge Management	CS_KB_TOP_KW_ MENU	Authoring, Search,

Table 3–1   Responsibilities, Menus, and Tabs for Internal Knowledge Management Users

Responsibility	Description	Menus	Tabs
CS_KB_AGENT	Interfaces with customers to record their problems and provides them existing solutions or creates new solutions	CS_KB_TOP_AG_ MENU	Authoring, Search
CS_KB_SYS_ ADMIN	An administrator with all Knowledge Management specific permissions including setup and other process oriented permissions	CS_KB_TOP_ MENU	Authoring, Search, and Setup

4

Required Implementation Tasks

This chapter includes the mandatory tasks required to set up Oracle's Knowledge Management. The topics include:

- Creating an Oracle's Knowledge Management Administrator

- Setting Knowledge Management Profile Options

- Creating a Resource Group

- Setting Knowledge Management Profile Options

- Creating a New Authoring Flow

- Viewing Authoring Flows

- Creating a Statement Type

- Viewing a Statement Type

- Updating an Existing Statement Type

- Deleting a Statement Type

- Creating a New Solution Type

- Viewing a Solution Type

- Updating a Solution Type

- Deleting a Solution Type

- Adding Solution Categories

- Editing Solution Categories

- Deleting Solution Categories

- Understanding Concurrent Programs

- Setting Up Solution Authoring Profile

- Setting Up Recommended Solutions

- Setting Up Frequently Used Definitions for Solutions

- Creating a Solution

- Basic Search

- Advanced Search

- Searching for a Statement

- Searching Solutions in Progress

4.1 Creating an Oracle's Knowledge Management Administrator

User access to Knowledge Management follows normal CRM user management rules. Access is controlled by specific responsibilities and roles given to users through the Oracle Forms user interface and the CRM System Administrator Console.

Responsibility: The System Administrator assigns the administrator responsibility, Knowledge Base System Administrator, Vision Enterprises, (CS_KB_SYS_ADMIN), to the user who is the Knowledge Management Administrator. This user performs setups and maintenance for Knowledge Management.

Role: The role assigned to the Knowledge Management Administrator is CS_SYSTEM_ADMIN. (There is no "user friendly" name for this role; the programmatic name and the user-friendly name are identical.)

Import Users as Resources: The System Administrator and the Knowledge Management Administrator both must be imported as a resource into CRM Application Foundation Resources to be utilized by Knowledge Management.

4.1.1 Setting up a User as a Knowledge Management Administrator (CS_System_Admin)

Steps

1. Log in to Oracle Forms application as system administrator. Select System Administrator responsibility.

2. Navigate to **Security** > **User** > **Define**. The Users form opens.

3. In the Users form, enter the **username** for the Knowledge Management Administrator.

   ■ **Example**: Knowledge Management_ADMIN

4. You must associate the user with an employee. Place your cursor in the **Person** field to enable the **Person Names** picklist. Search for and select the appropriate employee.

5. Enter a password for the new user in the **Password** field. Use the **Tab** key to clear the field and re-enter the same password to validate.

6. In the **Responsibilities** block, search for and select CS_KB_SYS_ADMIN responsibility.

7. **Save** changes.

8. Next, set this user's JTF profile options: Close the Users form and navigate to **Profile** > **System**.

9. In the **Find System Profile Values** form, submit a query with the username of the new user in the **User** field and JTF%DEF% in the **Profile** field. The System Profile Values form will appear with a list of search results.

10. Find the JTF_PROFILE_DEFAULT_APPLICATION profile in the list and set it as follows at the user level (enter the number in the User column):

    ■ **JTF_PROFILE_DEFAULT_APPLICATION** - 170

    This tells the system that the default application for this user is the Oracle Service suite of applications (Knowledge Management, Charges, Counters, previously Install Base), whose application ID is 170.

11. **Save** changes and close the form.

12. Next, set this user's JTF default responsibility.

13. Follow the **Finding Responsibility ID** steps shown below to determine the Responsibility ID value. Make a note of the RESPONSIBILITY_ID.

14. Once you have the numerical value associated with the Responsibility ID, navigate to **Profile** > **System**.

15. In the **Find System Profile Values** form, submit a query with the username of the new user in the **User** field and JTF%DEF% in the **Profile** field. The System Profile Values form will appear with a list of search results.

16. Set the JTF_PROFILE_DEFAULT_RESPONSIBILITY at the user level for the new administrator (enter the number in the User column):

■ **JTF_PROFILE_DEFAULT_RESPONSIBILITY** - <value is a dynamic number determined through **Finding Responsibility ID** steps shown below>

This tells the system that the default responsibility for this user is CS_KB_SYS_ADMIN.

17. **Save** changes and close the form.

For more information on profile options, please see the Profile Options appendix.

Finding Responsibility ID

Use the following steps to find the RESPONSIBILITY_ID value of a responsibility.

a. In Oracle Forms as System Administrator, navigate to **Security** > **Responsibility** > **Define**. The Responsibilities form opens.

b. From the top menu, select **View** > **Find**. Search for the responsibility.

c. Once found, highlight the responsibility, and click OK in the search window. The Responsibilities form is populated with the information for the responsibility.

d. With the cursor in any field of the record, select **Help** > **Diagnostics** > **Examine**. The Examine Field and Variable Values form opens.

e. In the Examine Field and Variable Values form, select RESPONSIBILITY_ID from the **Field** LOV. The **Value** field displays the value of RESPONSIBILITY_ID.

f. Make a note of the numerical value displayed in the **Value** field. Use this number as the default responsibility ID at the user level when setting up new administrative users in Oracle Forms.

Assign Role(s)

Roles are collections of privileges that control access to specific pieces of functionality within a page; these granular access rights are known as permissions. A single role can have several permissions.

Follow the steps below to assign the Knowledge Management Administrator role (CS_SYSTEM_ADMIN) to the new Knowledge Management Administrator.

Steps

1. Log in to the JTF login screen as a system administrator.

2. Navigate to the Users screen:

   - **Users** > **Registration** > **User Maintenance**

3. In the **Users** screen, query for the username of the user who will be the Knowledge Management Administrator.

4. After the search yields the username, click the underlined hyperlink of the username to access the User Details screen.

5. In the **User Details** screen, click the **Roles** button to access the User Role Mapping screen. A list of available roles will appear, along with a list of assigned roles. If this is a new user, the Assigned Roles column will be blank.

6. Highlight the **CS_SYSTEM_ADMIN** role in the Available Roles column, and use the right arrow (>) button to move it to the Assigned Roles column.

7. Click **Update** to save changes.

8. Sign out.

9. **Verify that the new user can log in:** Sign in to the JTF login screen as the newly created user.

For additional information on how to assign roles in the CRM System Administrator Console, please consult:

- *CRM Technology Foundation Concepts and Procedures*

4.2 Setting Knowledge Management Profile Options

Profile options are seeded within all Oracle applications, and each module has its own specific set of profile options. Although all profile options are seeded, there are some settings that must be done by a system administrator.

Oracle's Knowledge Management has its own set of profile options. To see all Knowledge Management profile options, go to Oracle's Knowledge Management Profile Options.

4.3 Creating a Resource Group

A resource group, in Knowledge Management, is a group of users who perform specific tasks in the solution authoring flow process. For example, a resource group for editorial review of solutions.

Login

Log on to Oracle Applications Forms.

Responsibility

System Administrator

Steps

1. Log on to Oracle Applications Forms as a system administrator. Responsibilities window opens.

2. Select Human Resource (HRMS Manager) responsibility for your organization.

3. Navigate to People> Enter and Maintain. People window opens.

4. You can query for an existing user or create a new user.

5. Associate a user with an employee by following these steps:

   a. Switch to System Administrator responsibility.

   b. Navigate to Security > User > Define. Users window opens.

   c. Query the user by entering some known value in the User name field.

   d. Give the user workflow user responsibility.

   e. Save the record.

6. Create a resource for an employee or party by following these steps:

   a. Switch the responsibility to the CRM Resource Manager.

   b. Navigate to Maintain Resources >Import Resources. Selection Criterion window opens.

   c. In the Resource Category field, select employee from the list.

   d. Enter the employee name or employee number to narrow search criteria.

   e. Select Search. Search Results section is populated with the results.

   f. Select Create Resource. Default Values window opens.

   g. Enter mandatory and other information. Select OK.

   h. Selected Resources window appears. Select Save Resource.

7. Create a resource group by following these steps:

   a. Switch the responsibility to the CRM Resource Manager responsibility.

b. Navigate to Maintain Resources > Groups. The Define Groups window opens.

> **Note:** If a group is not available, you must create one by entering a group name in the Define Groups window. Select Save.

c. Enter the group name. Under the Members tab enter the names of the employees who will be in the group.

d. Navigate to the Usages tab. Select Oracle *i*Support.

e. Save the record.

4.4 Understanding Concurrent Programs

A concurrent program runs simultaneously with other programs and/or tasks. Concurrent Processing is an Oracle Applications facility that lets long–running, data–intensive tasks run simultaneously with online operations, taking full advantage of multitasking and parallel processing. A System Administrator can monitor and control concurrent processing using a few simple forms in Oracle Applications Forms. For more information about Running Oracle Applications Reports and Programs see *Oracle Applications User's Guide.*

4.4.1 Concurrent Programs for Knowledge Management

You have to run the following concurrent programs for the particular task associated with each:

- **Knowledge Management Index Synchronization Program** to synchronize the Intermedia index to display the solutions in the search process

- **Knowledge Management Update Solution Used Count Program** to update the solution used count for frequently used solutions/common problems.

- **Knowledge Management Solution Export Program** to export solutions from Knowledge Management. It is a PL/SQL concurrent program that exports solutions from Knowledge Management using the user specified criteria. The results are saved in the XML format in the concurrent programs "out" file. This concurrent program downloads the solutions based on the following criteria:

  - the category name from which the solutions have to be downloaded

  - the status of all the solutions in a category, for example, Published or All

- **Knowledge Management Solution Import Program** to import new solutions and to update existing solutions in Knowledge Management. It is a Java concurrent program that can upload multiple solutions. The solutions to be imported can either be new solutions or existing solutions with updates. The Program uses the input xml file name (absolute path) and commit interval (how often to commit the import) parameters for running. The File has to contain the solutions in a XML format and have to be compliant with the Document Type Definition (DTD) for Knowledge Management, cskb_solution.dtd. This program checks the validity of the input xml document. If it is valid, the solutions are created, one after the other. If any data is invalid, the solutions are not created. If processing for any one solution fails, its changes are rolled back, and a log error message is written and the next solution in the file is imported. Each new solution to be uploaded can either have a Saved status, or it can be directly published, if the flow information is provided. Only published solutions can be updated, and have a published status after update. Attachments and external links are not supported but Statement Global Update is supported. Any statement with a statement number is globally updated according to the new data specified in the XML document. To see an example of a DTD file see Appendix D, "Sample File For Knowledge Management Solution Import Program"

Login
Log on to Oracle Applications Forms.

Responsibility
No responsibility is provided by default. You have to create your own responsibility.

Prerequisites
An assigned user with appropriate responsibility to run the above programs.

Steps
1. Log on to Oracle Applications Forms as a CRM system administrator. Responsibilities window appears.

2. Select the System Administrator responsibility.

3. Navigate to Security -> Responsibility -> Define. Responsibilities window opens.

4. Query your system administrator responsibility to get the request group name for it. A request group is a collection of reports or concurrent programs. Your responsibility's request group determines the requests that appear in the Submit Request window.

5. Navigate to Security -> Responsibility -> Request. Request Groups window opens.

6. Query the request group name obtained for your system administrator responsibility.

7. Under the Requests section, add the concurrent request if it does not already exist.

8. Enter information in the following fields:
   Type = Program
   Name = concurrent program name

   a. To synchronize the InterMedia index:

   ■ concurrent program name = Knowledge Management Index Synchronization Program

   b. To update the solution used count for frequently used solutions:

   ■ concurrent program name = Knowledge Management Update Solution Used Count Program

   c. To export Solutions from Knowledge Management

   ■ concurrent program name = Knowledge Management Solution Export Program

   d. To import new solutions and/or update existing solutions within Knowledge Management

   ■ concurrent program name = Knowledge Management Solution Import Program

9. Save the record.

4.4.2 Running a Concurrent Request

1. If required, switch the responsibility to system administrator.

2. Navigate to Concurrent ->Requests. Find Requests window opens.

3. Select Submit a New Request.

4. Select Single Request. The Submit Request window opens.

5. Select the concurrent request (program) that you want to run.

6. Enter the required parameters. The concurrent programs can be scheduled to run periodically.

7. Select Submit to submit the request. You receive a confirmation that a request has been submitted.

4.4.3 Viewing the Concurrent Request Status

1. Navigate to Concurrent -> Requests. Find Requests screen opens.

2. You can enter the Request Id, or any other criteria to search for a request, or select All My Requests.

3. Select Find. The Requests screen opens.

4. Select Refresh Data to see the latest status

4.5 Setting Up Solution Authoring Profile

Authoring flows define the steps that a solution goes through in the solution authoring flow process. After creating a solution and submitting it to an authoring flow, an Knowledge Management internal user in the assigned user group can approve or reject a solution to the next or previous step.

Members of a user group can set up their own profile, i.e, select one or more products and/ or categories in the Solution Authoring Profile screen to receive a notification that a solution related to that product and/or category is ready for review or when a solution is obsoleted or published. Members who do not subscribe to any product or category will not receive a notification but can search for all work-in-progress solutions from the Work Pending screen by selecting Search Work in Progress button. Refer to the *Oracle Workflow Guide* on how to set up and monitor a workflow.

> **Note:** E-mail notifications will be sent only if the Workflow mailer is setup and properly configured. The PHP/Self Service Workflow notifications screen can also be used to view notifications. Please see the Workflow documentation for more information on how to start and configure the workflow mailer.

Prerequisites

None

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

   > **Note:** Your system administrator can give you the values that
   > should replace `<host>` and `<apache port>` in this URL.

2. Enter your user name and password.

3. Select Profile > Solution Authoring Profile.

4. In the Categories sub-section, select Add. The Select Solution Categories screen appears.

5. Check the check-box corresponding to the solution category that you want to select. Select OK.

6. In the Products sub-section, select Add. Select a product from the list or search for the product.

7. Select Update. Solution Authoring Profile is updated.

4.6 Creating a New Solution Type

Knowledge Management is seeded with the symptom/cause/action (SCA) solution type. Perform the following procedure to create a new solution type. For more information about solution types, see *Oracle's Knowledge Management User Guide*. You cannot create duplicate solution types.

Prerequisites

Knowledge Management administrators with edit permissions (CS_Type_Edit) can create a new solution type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup > Create Type. The Create Type screen appears.

4. From the Type drop-down list, select Solution.

5. Enter a name for the solution type in the Name field.

6. In the Description field, briefly describe the solution type. The description of a solution type is only for administrators and cannot be viewed by a customer.

7. Select Create. The Solution Type screen reappears with a Related section. You can associate statement types or external links to the solution type.

4.6.1 Associating a Statement Type to a Solution Type

You can associate a statement type to a solution type in the Associate Statement Types screen.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup > Solution Types. The Solution Types screen appears.

4. Select the Solution Type number link. The linked Solution Type screen appears.

5. Select Add/Delete button. The Associate Statement Types screen appears.

6. To add a statement type to the existing solution type, choose the desired statement type from the Available Statements Types box and assign (>) it to the Selected Statement Types box.

7. Select Save to save the changes or Cancel to restore the original values and return to the previous screen.

4.6.2 Disassociating a Statement Type from a Solution Type

You can disassociate a statement type from a solution type in the Associate Statement Types screen.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup > Solution Types. The Solution Types screen appears.

4. Select the Solution Type Number link. The linked Solution Type screen appears.

5. Select Add/Delete button. The Associate Statement Types screen appears.

6. To delete a statement type from the existing solution, choose the desired statement type from the Selected Statement Types box and use the arrow key (<) to move it to the Available Statements Types box.

7. Select Save to save the changes or Cancel to restore the original values and return to the previous screen.

4.7 Viewing a Solution Type

In Knowledge Management, information is organized into solutions, segmented into solution types. Knowledge Management is seeded with symptom/cause/action (SCA) solution type.

Use this procedure to view existing solution types.

Prerequisites

All internal users can view existing solution types.

Steps

1. Navigate to the Oracle CRM Applications login page at:

    ```
    http://<host>:<apache port>/OA_HTML/jtflogin.jsp
    ```

2. Enter your user name and password.

3. Navigate to Setup > Solution Types. The Solution Types screen displaying a list of existing solution types appears.

4. Select the numbered link to view details. You can also update the solution type and add/delete statement types or external links on this screen.

4.8 Updating a Solution Type

Use this procedure to update an existing solution type.

Prerequisites

You must have edit permissions (CS_Type_Edit) to edit a solution type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

    ```
    http://<host>:<apache port>/OA_HTML/jtflogin.jsp
    ```

2. Enter your user name and password.

3. Navigate to Setup > Solution Types. The Solution Types screen with a list of existing solution types appears.

4. Select a Solution Type Number link to view the corresponding Solution Type screen.

5. To update the name or description of the Solution Type, enter the new information in the appropriate fields.

6. Select Update.

7. To update the related statement types or external links, make the required selections.

8. Select Update to save the changes. Select Restore to return to original values. Select Delete to delete the solution type.

4.9 Deleting a Solution Type

Use this procedure to delete a solution type. Do not delete the default solution type, SCA. This procedure cannot be undone.

Prerequisites

- Knowledge Management administrators must have edit permissions (CS_Type_ Edit) to delete a solution type.

- You must delete any statement types associated with the solution type that you want to delete.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Solution Types. The Solution Type screen appears.

4. Select the solution type numbered link that you want to delete.

5. In the Solution Type screen, ensure that there are no related statement types/external links listed in the Related sub section.

6. To remove related statement types:

   a. Select Add/Delete button. The Associate Statement Types screen appears. Disassociate the statement type from that solution type.

   b. Select Save. The Solution Type screen reappears with no statement types in the Related section.

7. Delete the associated external links.

8. Select Delete to delete the solution type.

4.10 Creating a Statement Type

A statement is a description about any aspect of a problem, its cause, or resolution. Statements can be segmented into statement types. For more information about statement types, see *Oracle's Knowledge Management User Guide.*

Prerequisite

Knowledge Management administrators with edit permissions (CS_Type_Edit) can create a new statement type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup > Create Type. The Create Type screen appears.

4. In the Type drop-down list, select Statement.

5. Enter a name for the statement type in the Name field.

6. Enter a description for the statement type in the Description field.

7. Select Create. The Statement Type screen reappears with a Related section. You can also relate this statement type to a solution type, or external links.

4.10.1 Relating/Mapping a Statement Type to a Note Type

Notes module in CRM Application Foundation is seeded with a set of predefined note types. Someone with CRM administrator responsibility can also create additional customized note types.

Notes in a Service Request are used to document the description and progress made in resolving customer issues. Notes are used to capture details that can be used to search the knowledge base for solutions or to create new solutions. See *Oracle Support User Guide* for more information.

Each note type can be mapped to only one statement type, since this mapping is used to translate notes from other objects, especially service requests, to statement types in Knowledge Management.

Prerequisite

Knowledge Management administrators with edit permissions (CS_Type_Edit) can relate a statement type to a JTF note type.

Steps

1. Create a new statement type or navigate to an existing statement type.

2. In the Related section, select External Links from the drop-down box.

3. Select Add. The Select an External Object screen appears. Select Note Type.

4. The Note Type screen appears. Search for the note type that you want to add to this statement type. Use (%) in Description field for a wildcard search.

5. From the Search results select the JTF note type to add to the statement type. Select Update.

4.11 Viewing a Statement Type

Statement type is an identifying name associated with a particular part of the solution type. For example, symptom is a statement type within the symptom/cause/action solution type.

Prerequisites

Internal users with view permissions (CS_Statement_View) can view existing statement types.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Statement Types. The Statement Types screen appears.

4. Select the numbered link to navigate to the Statement Type screen for the selected statement type.

4.12 Updating an Existing Statement Type

Prerequisites

Knowledge Management administrators with edit permissions (CS_Type_Edit) can edit a statement type.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Statement Types. The Statement Types screen appears.

4. Select the numbered link to navigate to the associated Statement Type screen.

5. Update the name or description of the statement type.

6. Select Update.

7. In the Related section, you can add or update the solution types or external links.

8. Select Update.

4.13 Deleting a Statement Type

Use this procedure to delete a statement type. You cannot delete the default statement type. This procedure cannot be undone.

Prerequisites

- Knowledge Management administrators with edit permissions (CS_Type_Edit) can delete a statement type.

- Remove a solution type or external link in use by the statement type to be deleted.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Statement Types. The Statement Types screen appears.

4. Select on the numbered link of the statement type that you want to delete.

5. In the Statement Type screen, ensure that there are no related solutions types or external links listed in the Related sub section.

6. To remove a solution type or external link being used by a statement type:

   a. In the Remove column, check the check boxes corresponding to the related solution types or external links.

   b. Select Update.

7. After removing the related solution types or external links, select Delete.

4.14 Adding Solution Categories

You can add solution categories from the Managing Solution Categories screen.

Prerequisites

Administrative permissions to add solution categories.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Categories. The Manage Solution Categories screen appears.

4. Select the root category or one of the child categories to which you would like to add categories by selecting the corresponding radio button.

5. Select the Add button. A new field populated as New Category appears.

6. Remove New Category from the field and enter a new category name in that field.

7. Select Save.

4.15 Editing Solution Categories

You can edit solution categories from the Managing Solution Categories screen.

Prerequisites

Administrative permissions to edit solution categories.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Categories. The Manage Solution Categories screen appears.

4. Select the root category or one of the child categories to edit by selecting the corresponding radio button.

5. Select the Edit button.

6. The selected category name appears in a field.

7. Edit the category name.

8. Select save.

4.16 Deleting Solution Categories

You can delete solution categories from the Manage Solution Categories screen.

Prerequisites

Administrative permissions to delete solution categories.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup> Categories. The Manage Solution Categories screen appears.

4. Select the category you want to delete by selecting the corresponding radio button.

5. Select Delete.

4.17 Creating a New Authoring Flow

Authoring flows define the steps that a solution must follow in the solution approval or rejection process.

Prerequisites

Administrative permissions to create a new authoring flow.

Steps

1. Navigate to the Oracle CRM Applications login page at:

    ```
    http://<host>:<apache port>/OA_HTML/jtflogin.jsp
    ```

2. Enter your user name and password.

3. Navigate to Setup >Authoring Flows. The Available Flows screen appears.

4. Select Create. The Authoring Flow Set Up screen appears.

5. Enter a flow name.

6. For each row, enter an order number, select the Step, Assigned to, and Action fields.

    -   Order: defines the sequence of steps in an authoring flow. It is a numbered order determining the order in which the steps will be viewed. e.g, a step with an order number 1 will be viewed before a step with an order number 5.

    -   Step: represents the various transitions within an authoring flow. An authoring flow can be assigned any of the following steps: Deleted, Draft, Editorial Review, Public, Public Internal, Public Limited, Published, Technical Review, and Under Edit. You can modify these steps by modifying the CS_KB_STATUS lookup type.

    -   Assigned To: represents the resource group that has permissions to checkout and modify a solution in a specific step of an authoring flow. An authoring flow can be assigned to any of the user groups that have required permissions. For example, Business User Group, Editorial Reviewers, Technical Reviewers, etc.

    -   Actions: represents the action that the Knowledge Management system needs to take in a specific step of an authoring flow. An authoring flow can have Notify, Obsolete, or Publish actions. These actions imply the following:

      a. Notify: an E-mail is sent to the resource group assigned to the step.

      b. Obsolete: the system flag for the solution is set to Obsolete. The solution is still retained in the database, but it is no longer visible to any user. An E-mail is sent to the resource group assigned to the step

      c. Publish: the system flag for the solution is set to Publish. If the distribution for the solution is set to External, then the solution is visible to external users. An E-mail is sent to the resource group assigned to the step

7. Select Update.

4.18 Viewing Authoring Flows

Authoring flows are the steps that a solution goes through in the solution approval or rejection process.

Prerequisites

Administrative permissions to view (CS_Workflow_Setup_View) a new authoring flow.

Steps

1. Navigate to the Oracle CRM Applications login page at:

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

2. Enter your user name and password.

3. Navigate to Setup >Authoring Flows. The Available Flows screen appears.

4. Select the Authoring Flow name to view flow details.

5. On this screen you can modify the order, step, assigned to, and action parameters.

6. You can also add a new row of values by selecting the More Rows arrow or delete a row by checking the Remove check box corresponding to the row that you want to remove. Select Update.

4.19 Setting Up Recommended Solutions

Use this procedure to add or delete solutions from the recommended solutions list and select the sort order in which the recommended solutions will appear.

Login

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_SYS_ADMIN

Prerequisites

Knowledge Management administrators and knowledge workers with view permissions (CS_Rec_Sol_View) can view recommended solutions

Knowledge Management administrators with update permissions (CS_Rec_Sol_Update) can update recommended solutions.

Steps

1. Navigate to Authoring > Top Solutions. The Recommended Solutions screen appears.

2. To add a solution to the list, select Add. The Add Recommended Solution screen appears. Enter the Solution Number. Select Done.

3. To rearrange a solution, check the check-box next to the solution to be moved and select Move Up or Move Down.

4. To delete a solution from the list, check the check-box next to the solution to be deleted.

5. Select Delete.

4.20 Setting Up Frequently Used Definitions for Solutions

You can provide your customers with a list of frequently used solutions within a specified time period. Use this procedure to set up frequently used definitions for solutions.

Prerequisites

Knowledge Management administrators with update permissions (CS_Freq_Used_Def_Update) can add or update frequently used definitions.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. Enter your user name and password.

3. Navigate to Setup > Frequently Used Definitions. The Frequently Used Definitions screen appears.

4. Select the time period that you want to use as a default time period.

   Note: You can also remove a time period from the list.

5. Select Update.

6. To add a new time period, select Add. The Add Definition screen appears.

7. Enter the new name, description, and number of days.

8. Select Save.

4.21 Creating a Solution

In Knowledge Management, a distribution level attribute is used for solutions and an access level attribute for users to control the access of solutions to different users.

There are four seeded distribution levels:

- Restricted (highest security)
- Internal
- Limited
- External (lowest security)

When solutions are created, they are assigned a distribution level by the author. Users are assigned an access level. Access levels are assigned based on the user's assigned permissions.

Login

Navigate to the Oracle CRM Applications login page at:

http://<host>:<apache port>/OA_HTML/jtflogin.jsp

Responsibility

- CS_KB_KNOWLEDGE_WORKER

- CS_KB_AGENT

- CS_KB_SYS_ADMIN

Prerequisites

Internal Knowledge Management users with create permissions (CS_Solution_ Create) can create a solution.

Steps

1. Navigate to Authoring > Create Solution. Solution Detail screen opens.

2. Enter a solution title. The maximum length of a solution title can be 80 characters.

3. Make a selection for the Distribution field. The options are Internal, Limited, Restricted, or External. You can view one or more of these values depending on your access level.

4. You can optionally select one or more categories, products, and/or platforms to be associated with this solution. To add a category, product, or platform, select Update. The Corresponding screen appears. Make the required selection.

   Note: You can also remove a related category, product, or platform from a solution.

5. Select a Solution Type from the drop-down list.

6. Select the Add button to navigate to the Statement Detail screen or select Search to navigate to the Advanced Search screen.

   Note: To save and submit a solution to an authoring flow, you have to create and save the mandatory statement types. Without including the mandatory statement types, you can only save a solution and not submit it to an authoring flow.

    a. Select a Content Type. The options are: Text, Text with Autolinks, HTML, and HTML with autolinks. The content type is only for statement detail field.

    b. Select a Distribution option. The options are External, Internal, Restricted, and Limited. You can view one or more of these values depending on your access level.

    c. Enter a summary for the statement. (Maximum limit is about 500 bytes).

    d. Enter information about the statement in the Detail field. (Maximum limit is 4 GB).

    e. Optionally, you can also import or export a statement from or to a local text file by selecting the Import or Export button.

    f. Select Save. The Solution Detail screen reappears.

7. Optionally, you can also add external links or attachments to the solution by choosing an option on the Add Another List and select Add. A corresponding screen appears. Make your selection

> **Note:** When a solution is obsoleted, the attachment attached to it is not obsoleted.

> **Note:** You can obsolete a statement from a solution, by checking the button corresponding to the statement that you want to obsolete and then select Remove. The statement that is not linked to any solution is obsoleted from the Knowledge Management database when the solution is published or obsoleted.

8. Either select Save Changes or Save and Submit to Authoring Flow radio button and click Apply.

9. If you select Save Changes, Solution Detail screen appears with the solution details. The solution will have a saved status and will be listed in the Work Pending screen. You can update this solution. You can also view, and/or add comments attached to this solution by selecting Comments button. (See Adding Comments to a Solution).

10. If you select Save& Submit to Authoring Flow radio button, and you have setup authoring flows, then Available Authoring Flows screen appears. Choose an authoring flow and select OK.

11. Another screen appears that prompts you to select a status. Select a status and select OK. Summary of the solution submitted to the authoring flow appears. Select OK. The Work Pending screen appears from where internal users with necessary permissions can search for a work- in-progress solution by selecting Search Work in Progress.

12. The Oracle Workflow engine determines the user group that is associated with a particular status of the solution. An E-mail or notification is sent to all members of that user group who have subscribed to a product or a category in the Solution Authoring Profile screen, that a solution is ready for review. The solution has to be related to the subscribed category/product. Any member can select the link in the E-mail and reply to the E-mail to accept the solution. (See Approving a Solution).

> **Note:** To edit a solution, you must belong to the solution's user group. The solution must be unlocked, and you must have appropriate status specific permissions.

4.21.1 Adding Comments to a Solution

You can add comments to a solution from the Solution Detail screen. Comments are used to provide feedback for correcting a solution or for enhancing the solution value. All added comments will default to a draft status and will have an internal distribution option.

Login

Navigate to the Oracle CRM Applications login page at:

http://<host>:<apache port>/OA_HTML/jtflogin.jsp

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_AGENT
- CS_KB_SYS_ADMIN

Prerequisites

Internal Knowledge Management users with create permissions (CS_Solution_ Comments_Add) can add comments to a solution.

Steps

1. Navigate to Authoring >Work Pending. The Work Pending screen with all the solutions in progress appears.

2. Select the numbered link of the appropriate solution to navigate to the Solution Detail screen to view details about the selected solution in progress.

3. Select the Comments button. The Comments on Solution screen appears.

4. Select Add Comment. The Create Comment screen appears with the Solution Number, Author, Distribution, and Creation Date.

5. Enter the comment summary.

6. Enter the comment detail.

7. Select Save. The Comments on Solution screen opens.

8. Select Return to navigate to the Solution Detail screen or select Add Comment to add another comment to this solution.

4.21.2 Approving a Solution

After creating a solution and submitting it to an authoring flow, an Knowledge Management internal user in the assigned user group at each step can either approve, or reject the solution to the next or previous step of the flow. Members of a user group assigned to the next step or previous step will receive an E-mail/notification that a solution is ready for review.

When a solution is submitted to the step that has the publish action, then the solution is published.

Login

Navigate to the Oracle CRM Applications login page at:

http://<host>:<apache port>/OA_HTML/jtflogin.jsp

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_AGENT

■ CS_KB_SYS_ADMIN

Prerequisites

To publish, or obsolete a solution to the next step, you have to be a member of the solution's user group to whom that step is assigned.

You must have status specific permissions i.e, permissions to edit a solution in the draft status, solutions in technical review status, etc.

Steps

1. Navigate to the Oracle CRM Applications login page at:
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp

2. Enter your user name and password.

3. Navigate to Authoring >Work Pending. The Work Pending screen with all the solutions in progress appear. Select Search Work in Progress button. Search For Solutions screen appears. Search for the solution that you have to work on. Search Results appear.

4. Select the solution and select the numbered link to navigate to the Solution Detail screen for that solution.

5. Select Check Out and optionally modify the solution. The Lock Confirmation screen appears. Select OK.

6. The Solution Detail screen appears. Make the required edits.

> **Note:** You can also select Comments to view any comments attached to the solution.

7. Select Save and Submit. A screen prompting you to select the next step appears. The options are:
   - Continue the current process
   - Reject the solution
   - Switch to another process

8. If you select Continue the current process or Reject the solution, a screen for you to select a status appears. If you select Switch to another process, the Available Work Processes screen appears. Select another work process and select OK.

9. Depending on your previous selection, select the solution status. Select OK. A message that the solution has been submitted appears. When the solution is submitted to a step whose action is publish, then the solution is published.

4.22 Basic Search

Perform a basic search if you want to find a solution using a simple keyword or to navigate through a category. Use this procedure to search for a published solution in Oracle Knowledge Management.

During search, solution distribution levels and a particular user's access level are compared to restrict the solutions that a user can see. Users having a particular access level can only see solutions having a distribution level with a higher numeric value.

Login

Navigate to the Oracle CRM Applications login page at:

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

Responsibility

None

Prerequisites

None

Steps

1. Navigate to Search > Basic Search.

2. Select a search option. The available options are: All Keywords, Accumulate, Any Keywords, Fuzzy Match, Theme, Intermedia, and Reference Number. (For more information on search options, see *Oracle's Knowledge Management User Guide*).

3. In the Search For field, enter known information to narrow down your search.

4. Optionally, you can navigate through a category tree.

5. Select Go. The results appear in the Solutions section.

6. To focus or narrow search results, enter a search criteria in Search Within Results field and select Filter. To view all results, select Full List.

4.23 Advanced Search

Advanced search allows you to search for solutions in specific categories, products, platforms or any combination of these. You can also select a solution type to narrow the search results and to choose the type of solutions that you want to find or you can search all solution types to get the maximum number of results. Searching by a statement type allows you to find an identical or similar statement to be used in finding all solutions that has a relationship to that statement. You can enter multiple queries, which can be used one at a time, or in combination to obtain the best search results.

The search result list displays a percent score and a color bar to indicate the closeness of the text match to the original query. The score is determined by InterMedia Text and varies based on the search option selected. Since the entire solution is indexed and InterMedia Text performs an analysis against all terms found in the solution, the title may or may not closely match the query that is entered. A solution ID is provided for reference with the solution or statement type. In addition, a description pertaining to the statement or solution and a last updated date is provided to indicate how current the information is.

Login
Navigate to the Oracle CRM Applications login page at:

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

Responsibility
None

Prerequisites
None

Steps
1. Navigate to Search > Basic Search. Select the Advanced Search link. Advanced Search screen appears.

2. In Filter Search section, you can optionally select categories, products, and/or platforms to narrow down the search criteria.

3. Select a search option. The available options are: All Keywords, Accumulate, Any Keywords, Fuzzy Match, Theme, and Intermedia. (For more information on search options, see *Oracle's Knowledge Management User Guide*).

4. Select a Relevancy Threshold or score to narrow the search results.

5. In Describe Your Problem section, select a solution type.

6. Select a statement type and enter any keywords to be searched in the Summary field.

7. Click Find Suggestions to search for statements or click Search to search for solutions. The results appear in the Results: Search section.

8. If you selected Find Suggestions, the statements searched appear in the Results: Search section. Select a statement and select one of the following options:

   ■ Replace all statements in problem description

   ■ Replace only selected statements in problem description

   ■ Append to Problem description

9. Optionally, you can select one or more statements from the Search: Results section and navigate to the Solution Detail screen by selecting Create Solution button.

10. The following warning message appears: "*The Statement Types identified below are not compatible with the Solution Type you have selected. Click on the Statement to modify its attributes.*"

11. Select a solution title, distribution level, and solution type.

12. Select the Statement Description link to navigate to Statement Detail screen. If the statement has a published status, then a Copy as New button appears.

    a. Select a statement type.

    b. Select Save. The Solution Detail screen appears without the warning message.

    c. You can continue creating a solution or select Search to navigate to the Advanced Search screen.

4.24 Searching for a Statement

Use the Statement Search screen to search for statements in the knowledge base. You cannot search for statements with an obsolete status. You can only search for statements that have a published or a draft status.

Login

Navigate to the Oracle CRM Applications login page at:

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

Responsibility

- CS_KB_KNOWLEDGE_WORKER

- CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Search > Statement Search. The Statement Search screen appears.

2. In the Search Statements screen, enter some known information to narrow your search:

    - Statement Number: is the number assigned to a statement in Oracle Knowledge Management when a statement is created.

    - Statement Type: is the category assigned to a statement when a statement is created.

    - Summary: a word or sentence used in the summary of the statement.

    - Sorted By: the options are, Last Updated Date, Statement Number, or Score.

3. Select Go. Search Statements Results screen appears with the results.

4.25 Searching Solutions in Progress

Solutions appearing in the Work Pending screen are solutions that have either been created and saved but not submitted to an authoring flow for approval or have been checked out by a user but have not been submitted back to an authoring flow.

Solutions in Search For Solutions In Progress screen are solutions that have been submitted to an authoring flow. These solutions have not yet been published. Once a solution has been submitted to an authoring flow, it is no longer in the author's work pending queue.

Login

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

Responsibility

- CS_KB_KNOWLEDGE_WORKER

- CS_KB_AGENT

- CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Authoring >Work Pending. The Work Pending screen with all the solutions that have ben saved but not submitted to an authoring flow appear.

2. Select Search Work in Progress button. Search For Solutions In Progress screen appears.

3. Enter one or more search criteria to narrow down the search results.

4. Select Search. Search results appear in the Search Results sub-section.

5. Select the numbered link to view details about the selected solution. Solution Detail screen appears.

6. If you have CS_KB_SYS_ADMIN permissions and the solution has been locked by another user, then you can view the Get Lock Button. Select the Get Lock button to navigate to Get Lock Confirmation screen. Select OK. Solution Detail screen appears. As an administrator you can update a solution that had been locked by another user.

5

Verifying Knowledge Management implementation

5.1 Verification of Knowledge Management Implementation

To check that you have implemented Oracle's Knowledge Management correctly, verify the following steps:

Steps

1. Verify that you have assigned CS_System_Admin role to a user and assigned CS_KB_SYS_Admin responsibility to a user for administrative privileges.

2. Verify that you have set up Oracle CRM Technology Foundation profile options.

3. Verify that you have set up Oracle's Knowledge Management profile options.

4. Verify that you have created one or more resource groups for authoring flows.

5. Verify that you have set up one or more authoring flows.

6. Verify that you have permissions to run the following concurrent programs:

   - Knowledge Management Solution Export Program

   - Knowledge Management Solution Import Program

   - Knowledge Management Index Synchronization

   - Knowledge Management Update Solution Used Count

7. Verify that you have set up the solution authoring profile for one or more users in one or more resource groups.

8. Verify that you can perform the following steps in Knowledge Management:

   1. Create, view, and update a solution type.

> 2. Create, view, and update a statement type.
>
> 3. Associate, and disassociate a statement type to a solution type.
>
> 4. Relate statement types to external links.
>
> 5. Create and modify categories.
>
> 6. Create a new authoring flow, and edit an existing authoring flow.
>
> 7. Create a solution.
>
> 8. Create a statement.
>
> 9. Submit a solution to an authoring flow.
>
> 10. View and search work pending solutions.
>
> 11. Publish a solution.

9. Verify that you can perform the following steps:

> 1. Add or update frequently used definitions for solutions.
>
> 2. Set up recommended solutions.

10. Verify that you can perform the following tasks in Knowledge Management:

> 1. Basic search
>
> 2. Advanced search
>
> 3. Search for a statement

6

Integrating Knowledge Management with Other Oracle Products

This chapter provides an overview and a list of all products with which Oracle's Knowledge Management integrates.

6.1 Overview

Oracle's Knowledge Management is a web based information management system that enables a user to efficiently search, create, distribute, and manage information. For an end user, Knowledge Management is an easy to use self-service application in which they can enter natural language queries for retrieving and solving their own issues. A customer support agent can use Knowledge Management as a powerful solution management tool. Solutions created in Knowledge Management are immediately available to users of all applications that integrate Knowledge Management, based on their access level. The availability of information at all times in organizations means quicker response for support calls with no long phone queue waits for the end users. This enhances customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations.

The tight integration that Knowledge Management has with several Oracle products allows the users of these modules to easily move data between applications.

Knowledge Management integrates with other Oracle modules such as Oracle Quality Online, Oracle Field Service, Oracle Support, and Oracle Depot Repair. This integration provides service agents for these modules easy access to solutions.

Oracle Knowledge Management also integrates with Oracle *i*Support. It enables customers of Oracle iSupport to resolve their own service issues.

6.1.1 Oracle *i*Support

Oracle *i*Support is a customer service portal that allows both customer and employee users of a service organization to resolve their issues themselves and to receive assisted service over the Internet. It is designed to enhance customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations.

Oracle *i*Support integrates with Oracle Knowledge Management to search for published solutions. A service request agent using Oracle *i*Support can search for solutions while creating a service request. Oracle *i*Support customers can also search Knowledge Management to find solutions without waiting for a service agent's assistance.

In the Create Service Request flow, an iSupport administrator can enable a knowledge base search by setting up *Oracle iSupport: Search Knowledge Base* profile option.

An iSupport user can view a solution by either selecting the Support tab or by selecting Find a solution link in How Can We Help You? bin. He can either search for a solution or navigate to a solution listed in the Common Problems and Recommended Solutions section. The Solution Details appear. A user can provide feedback on the solution by selecting Yes or No for "*Can this solve your problem*" question. He can also select the Add to Quick Links link or select the Create Service Request button to navigate to Create Service Request screen.

6.1.2 Oracle Support (Oracle Teleservice)

Oracle Support (part of the Oracle TeleService suite) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. Oracle Support uses Knowledge Management to leverage a knowledge base of previously reported problems and solutions. As new service requests are logged, agents can search the knowledge base to identify existing solutions that can resolve customer issues or contribute new solutions to the knowledge base. A user can navigate from the View Service Request Form to Advanced Search screen of Knowledge Management. A solution created in Knowledge Management can also be linked to a Service Request (based on profile option Knowledge: Solution Solved Action). Notes in a service request are used to document the description and progress made in resolving a customer issue. Notes are used to capture details to search the knowledge base for solutions and statements. Notes are also used to create new statements to contribute to the knowledge base. An agent has to use certain note types for searching the

knowledge base. Examples of note types to be used for searching are Symptom, Cause, Action, Problem, and Solution.

The following information from the service request is passed to the Knowledge Management Search screen.

- If your note was saved in the service request using a Note Type that has been mapped to a statement type in Knowledge Management, then the note text is defaulted to the search screen.

- Product and Platform

- Service Request summary is defaulted into the Keywords for searching.

You can view the details of all solutions found in the search and select the solutions that are useful for the resolution of your service request.

You can also either link relevant solutions to your service request or make a local copy of a solution and make modifications to it. See the latest version of *Oracle Support User Guide* for more information.

The integration of Oracle Support's Service Request module with Oracle Knowledge Management reflects the following process flow:

6.1.3 Oracle Depot Repair

Oracle Depot Repair is designed to track and manage the repair process in a service organization. This application reduces customer downtime and helps bridge the gap while the product is being repaired.

Oracle Knowledge Management allows an agent in Oracle Depot Repair to review the full problem solution life span, starting from the initial diagnosis of a problem to problem resolution. A Depot agent can search for a solution for a repair order by navigating to the Advanced Search screen. Product and work summary of the repair order are copied to the Advanced Search screen. A solution can also be linked to a repair order. See the latest version of *Oracle Depot Repair User Guide* for more information.

6.1.4 Oracle eMail Center

Oracle eMail Center is the module for managing inbound email interactions with customers, partners, suppliers, employees, and others that interact with an organization. Oracle eMail Center provides an agent with tools and capabilities to maximize their productivity and effectiveness. See the latest version of *Oracle eMail Center User Guide* for more information.

Oracle Knowledge Management integrates with Oracle eMail Center during inbound email processing. Oracle Knowledge Management can be searched for appropriate solutions by Oracle eMail Center agents while responding to an email. The searched solutions can be sent as an e-mail message to the customer.

6.1.5 Oracle Quality Online (OQO)

Oracle Quality Online is a web-based application that can be used by organizations to track and manage product defects and enhancements. The resolved defects in Oracle Quality Online can be submitted to Oracle Knowledge Management as solutions. This increases the knowledge base of solutions and allows users of both modules to search for existing solutions and to prevent duplicate defect entry. If an agent decides to submit a created defect to Knowledge Management, then an OQO agent can navigate to Knowledge Management. Published notes in the defect can also be copied to Knowledge Management, if the Defect Note Types had been mapped to Knowledge Management statement types.

Oracle's Knowledge Management also uses the Token Rules or dynamic linking functionality developed in OQO. See the latest version of *Oracle Quality Online User Guide* for more information.

6.1.6 Oracle Field Service

The Oracle Field Service suite supports an automated process used by service organizations to manage their field service operations. It assists in the entire service process from taking the customer call to fixing and reporting on the problem at a customer site.The Field Service suite offers a range of products to meet an organization's business needs.

The Field Service application assists in assigning tasks to service representatives, creating and dispatching daily schedules, and monitoring progress.

Service requests are analyzed by a support agent who searches Knowledge Management for a solution and creates a task based on the problem description and action needed to solve the problem.

7

Diagnostics and Troubleshooting

7.1 Common Problems and Solutions

This Chapter provides instructions on error corrections and workarounds for common problems that you may have in configuration or administration of Oracle's Knowledge Management.

What factors determine the results of a solution search in Knowledge Management?

In Knowledge Management, a distribution level attribute is used for solutions and an access level attribute for users to control the access of solutions to different users.

Distribution levels are linearly arranged (low to high) and have a number associated with them. There are four seeded distribution levels:

- Restricted (highest security) > 900
- Internal > 1000
- Limited > 2000
- External (lowest security) > 3000

When solutions are created, they are assigned a distribution level by the author. The distribution levels LOV is defined in the CS_KB_ACCESS_LEVEL Lookup type.

Users are assigned a similar attribute called an access level. Access levels are numeric and assigned based on the user's assigned permissions. The numeric values associated with viewing a solution are the following:

- CS_Solution_View_Restricted > 900
- CS_Solution_View_Internal > 1000
- CS_Solution_View > 3000

Solution distribution levels and a particular user's access level are compared, during searching, to filter the solutions that a user can see. Users having a particular access level can only see solutions having a distribution level with a higher numeric value. When a user searches for a solution in Knowledge Management, the search results are affected by the following factors:

- user access level (internal or external)

- solution distribution level

- Solution versions (Published, Draft, Obsoleted, etc.)

The following business rules apply:

- For External Users with CS_Solution_View_Only permission (For example, iSupport, Customer users): Only the external solutions that are marked as published are shown.

- For Internal Users with CS_View_Internal and CS_View_Restrict permissions (For example, iSupport, Employee users): Only the internal or external solutions that are marked as published are shown. If no published version of the solution is available, then, the internal or external solutions that are marked as the latest draft version (saved or reviewed) are shown.

Why can't I find a new solution using the Advanced Search or Basic Search Screen?

A solution has to be indexed before it can be retrieved through a search in any of the search screens. To search and view new solutions, you have to first run the Knowledge Base Sync Index concurrent program to refresh the solutions and the solution count in the knowledge base.

To see the solutions, you need to make sure that you have the appropriate access level.

Sometimes search fails if an invalid package like CS_KNOWLEDGE_PVT is installed in your environment.

When I try to do a Basic Search for a solution, I get the following error message:
java.sql.SQLException: ORA-20000: interMedia Text error: DRG-10599: column is not indexed.

Check if InterMedia Text has been set up correctly in your environment and if the InterMedia listener is up.

The other cause of the error may be that Intermedia index may not be getting built in your environment during the installation. You can rebuild the index by running the following script.

```
$CS_TOP/patch/115/sql/cskbctxc.sql
```
Read the comments on the top of the sql script for parameter information.

I get this error:java.sql.SQLException: ORA-20000: interMedia Text error: DRG-10599: column is not indexed

The intermedia index column on your environment is not indexed, or the index is not being rebuilt. Drop and create index and make sure it is valid.

Index belongs to the CS schema. Log on with a CS responsibility and manually drop the solution index:

CS_KB_SETS_TL_N3 force

Run the index creation script:

```
$APPL_TOP/cs/patch/115/sql/cskbctxc.sql <cs user> <cs password> apps applsys
```

I have javascript is enabled in my browser, yet some of the links do not work.

- Bounce the apache server and clear the OA_HTML/ jsp caches
- Check NLS_LANG settings
- Remove any invalid objects

I get the following java error when I click on Find Similar Statements on the Solution Detail Screen: java.sql.SQLException: ORA-20000: interMedia Text error: DRG-10599: column is not indexed.

The Intermedia Index is missing. You need to recreate the index. You can rebuild the index by running the following script.

```
$CS_TOP/patch/115/sql/cskbctxc.sql
```

On launching Oracle's Knowledge Management HTML UI from Service Request, this error is encountered:
"User does not have proper permissions"

Please grant one or more of the following roles to your user:

- CS_Support_Agent

- CS_Knowledge_Worker

- CS_ System_ Admin

Why can I not see the statements attached to a solution while viewing a solution?

You should save a statement to your solution from the Statement Detail screen. When you do this, you will see a statement added under the statement section in your solution. The highlighted and underlined statement summary indicates that this has been saved to the database.

The statement section on the Solution Detail screen is only for query and will not actually save a statement to your solution.

Why can't I select a statement from search results section after doing a Statements Search?

The statement may be in the draft status. You can only select a statement that is in the published status. Only existing published statements can be linked to solutions.

How do I publish a statement?

A newly created statement is in a draft status by default. It is published when the solution for which it is initially created is published.

From the Oracle Support module, when I navigate to Knowledge Management and try doing a Basic or an Advanced search for a solution, no results are returned. If I do a search on entering a query from the Quick Find menu, results are returned.

Run the Knowledge Base Sync Index concurrent program to reindex the Knowledge Management solutions.

Make sure that the solutions that you have created and submitted are not in the draft status. The solutions have to be in the published status to be reindexed.

Why can I not edit a statement in a published solution that I can check out?

Only a Knowledge Management administrator has the permissions to edit a statement in a solution that has been published. An administrator can search a statement from the Search Statement screen.

The CS_Statement_Global_Update permission is only given to Knowledge Management administrators to prevent knowledge workers from changing the statements that are shared between other solutions.

Why do I as a member of a user group that was assigned all steps in an authoring flow, not get an E-mail for a solution that I created and submitted to that authoring flow?

To get an E-mail notification for a solution, you need to make sure that:

- In the workflow user preference setup, HTML mail has been selected
- You have subscribed to the products/categories related to the solutions that you are interested in from the Solution Authoring Profile screen
- E-mail id should be attached to an employee
- System admin workflow notification is setup
- Ensure that the mail notifier in your environment is working

When are E-mail notifications sent to users belonging to a step in an authoring flow?

E-mail notification is sent in the following cases:

1. When a solution is submitted to the step that you are assigned to and you have subscribed to the product /category to which the solution is related.
2. After completing a step in an authoring flow.
3. When the solution is published or obsoleted and you have subscribed to the product and/or category in the Solution Authoring Profile screen.
4. If you checkout a solution that has been locked by another user.
5. If a solution is rejected to you as an author of a solution.

Service Request (SR) is not linking to Knowledge Management, i.e, the problem described in a SR is not appearing in the Knowledge Management screen and the solution found in Knowledge Management is not being referenced in SR.

Clear the IBU and CS caches and bounce the apache server.

In the Customer Support module, after I click the Yes button for "Does the solution solve your problem" and after clicking Exit from Knowledge Management button and the Refresh button on the Workbench tab, the solution does not appear in the Notes and Knowledge section and the row is not being added to the CS_KB_SET_LINKS table.

For the solution to appear in the Notes and Knowledge section and for a row to be added linking the service request and the solution in the CS_KB_SET_LINKS table, make sure that other_id is the same as the service request id and object_code is the same as the SR string.

Make sure that the profile option Knowledge: Action for Positive Solution Feedback is set up to link solution as solved.

Also, clear the IBU and CS caches and bounce the server.

Why do I get no results when I use Knowledge Management from Service Request to search for a solution?

Check if the package cs_kb_ctx_pkg is installed in your environment's ctxsys schema. If this package is not installed or is improperly installed, then the intermedia text indexes will not be properly populated and you will not be able to find anything in the knowledge base. Install the package by running the $CS_TOP/patch/115/sql/cskbctxs.pls and cskbctxb.pls scripts. Use the parameters as documented in the scripts and then rebuilt the index.

I cannot navigate to the Solution Detail screen from the Service Request application?

To navigate to the Solution Detail screen, you need to be assigned either of the following roles:

- CS_Support_Agent
- CS_Knowledge_Worker
- CS_ System_ Admin

Also, you need CS_Solution_Create permission.

How are attachments to solutions in Knowledge Management stored?

Attachments to solutions in Knowledge Management are stored in the database through JTF attachments. For more information on JTF Attachments, see the latest version of *Oracle CRM Application Foundation User Guide.*

When are solutions marked for re-indexing?

When ever a solution is updated, it is marked for reindexing.

Why is the text that I enter in the Statement Summary field saved as a JSP file on the hard disk when I click the Export button on the Statement Detail screen?

It is an Internet Explorer bug. You have to download and install a patch containing this fix from the Microsoft website.

When are statements considered duplicate?

Statements are considered duplicate if they have the same summary, same type, same distribution, and same details.

Which Solutions Are Found In Work Pending status and which are found in Search Work In Progress status?

Authoring flows are used with resource groups to move solutions from a created status to a published status.

Solutions appearing in the Work Pending screen are solutions that have either been created and saved but not submitted to an authoring flow for approval or have been checked out but have not been submitted back to an authoring flow.

Solutions in Search For Solutions In Progress screen are solutions that have been submitted to an authoring flow. These solutions have not yet been published. Once a solution has been submitted to an authoring flow, it is no longer in the author's work pending queue. Solutions that have been submitted to an authoring flow move between the Work Pending screen and the Search For Solutions in Progress screen until they are published.

For example, an authoring flow has the following three steps:

- Review Ready
- Publish Ready
- Publish

The action for step1 and step 2 is notify. The action for step 3 is publish. There are two resource groups: Reviewers and Publishers.

The resource group that is associated with step 1 is the Reviewers group. The resource group associated with step 2 and step 3 is the Publishers group.

In step 1, an author has submitted a solution to an authoring flow and set the status to Review Ready. After the solution is submitted, the solution is no longer in work pending queue of the author. It can now be searched from the Search For Solutions In Progress screen.

Members of the Reviewers group can navigate to the Search For Solutions in Progress screen and query the solutions that are in a Review Ready status. Once a solution is checked out by a reviewer, the solution enters the work pending queue of that reviewer.

After reviewing the solution, the reviewer can save and submit the solution to the next step in an authoring flow, which is Publish Ready. As soon as the solution is sent to the next step, it is back in the Search For Solutions in Progress status. Members of the Publishers group can go to Search For Solutions in Progress and query the solutions that have been set up to Publish Ready. When a publisher checks out the solution, the solution enters the work pending queue of that publisher. The publisher can save and submit the solution to the next step in the authoring flow, which is Publish.

Since step 3 is the last step in the authoring flow, the solution is neither in the work pending queue of any reviewer/publisher nor in Search Solutions in Progress screen but becomes a published solution that can be searched by all users through Basic Search or Advanced Search screens.

Why can I not delete a solution?

Deleting solutions is not allowed in this release of Oracle's Knowledge Management. You can create an authoring flow to obsolete a solution. Obsoleting is known as soft deleting.

I get the following error while submitting a solution to the next step in a workflow:
ORA-20160: Encountered an error while getting the ORACLE user account for your concurrent request to run from. Review your error messages (Help Error) to see the cause of the error. Contact your system administrator.

Navigate to Oracle Applications Forms and log in as a system administrator. navigate to the Alert Manager.

Alert -> Define

View -> Query by example -> Enter

Table ->%WF_ITEMS%

View -> Query by example -> Run

ADS Workflow Owner Assignment

ADS Workflow User Key Assignment are displayed

Uncheck the Enable checkbox and save because these two alerts are not part of the business flow of Knowledge Management and should not be enabled.

How is Multi Lingual Support (MLS) used in Knowledge Management?

When you create a solution in one language, a copy of the solution is created in other languages that you have installed. If you assign the publish status to any copy of the solution, then, the copy of the solution for other languages also gets published.

Hence, you need to make sure that the solution is ready for all the installed languages before you put it in the publish state.

Can the search methods in Basic and Advanced Search be configured?

Yes. The search methods in Basic Search and Advanced Search can be configured. CS_KB_SEARCH_TYPE_OPTIONS Lookup Type contains a list of lookup values that represent the different search methods.

Why do I See the following Warning even if I do not select any statement type or solution type while creating a solution:

The statement types identified below are not compatible with the solution type you have selected. Click on the statement to modify its attributes.

All solutions and statements in Knowledge Management have to have a type. Solutions/statements without a solution type and statement type are considered as "not compatible".

You have to select a solution type and then click on the statement link to select a statement type and the warning will go away.

Can we reference Image Files in the Statement?

It is not recommended to reference image file in the body of the statement.From this release, for security, any hard coded file ID access is not going to work.

The regular attachment of a solution works. If you click the link in the attachment section, you can see the JPG.

JMES patch requires all file IDs be encrypted before allowing the download.

A

Oracle's Knowledge Management Seed Data

A.1 User Role to Permission Mapping

Each type of a user in Oracle's Knowledge Management System has a set of permissions. The following table summarizes Oracle's Knowledge Management Roles to Permissions mapping.

A.1.1 Knowledge Management Roles

An Oracle's Knowledge Management Administrator has all Knowledge Management specific permissions including all setup and other process oriented permissions.

A knowledge worker is a user who creates/edits/technically reviews information in Knowledge Management.

A Knowledge Management Agent is a user who interfaces with the customers directly (on the phone) or indirectly (online) to record their problems and provides them existing solutions or creates new solutions.

The following table lists role and permissions associated with a Knowledge Management Administrator, Knowledge Worker and a Knowledge Management Agent.

Table A–1   Knowledge Management Roles and Permissions

Permissions	Description	CS_ SYSTEM _ADMIN	CS_ KNOWLEDGE _WORKER	CS_ SUPPORT _AGENT
CS_Advanced_ Search	Knowledge: Search: Permission to view the Knowledge Management Advanced Search Screen	YES	YES	YES
CS_Solution_View	Knowledge: Search: Permission to view solution	YES	YES	YES
CS_Solution_View_ All	Viewing all solutions	YES		
CS_Solution_View_ Internal	Knowledge: search: Permission to View Public and Internal Solutions	YES	YES	YES
CS_Solution_View_ Public	Permission to view Public Solutions	YES		
CS_Solution_View_ Restricted	Knowledge: Search: Permission to view Restricted Solutions	YES		
CS_Solution_Create	Knowledge: Authoring: Permission to create a solution	YES	YES	YES

Table A–1 Knowledge Management Roles and Permissions

Permissions	Description	CS_ SYSTEM _ADMIN	CS_ KNOWLEDGE _WORKER	CS_ SUPPORT _AGENT
CS_Assoc_Ext_ Obj_To_Sol	Knowledge: Authoring: Permission to attach external objects to a solution	YES	YES	YES
CS_Solution_ Update	Knowledge: Authoring: Permission to Update a solution	YES	YES	YES
CS_Solution_Delete	Knowledge: Authoring: Permission to delete a solution	YES	YES	YES
CS_Solution_View_ Internal	Knowledge: search: Permission to view public and internal solutions	YES	YES	YES
CS_Solution_ Status_Update	Update Solution Status	YES		
CS_Solutions_ Comments_Add	Knowledge: Authoring: Permission to add solution comments	YES	YES	YES
CS_Solution_Get_ Lock	Knowledge: Authoring: Permission to get solution lock from user	YES		
CS_Freq_Used_ Def_View	Knowledge: Setup: Permission to view frequently used solution definitions	YES		
CS_Freq_Used_ Sol_View	Knowledge: Search: Permission to view frequently used solutions	YES	YES	YES
CS_Freq_Used_ Def_Update	Knowledge: setup: Permission to update frequently used solution definitions	YES		
CS_Rec_Sol_View	Knowledge: Setup: Permission to view Recommended Solutions	YES	YES	YES

Table A–1   Knowledge Management Roles and Permissions

Permissions	Description	CS_ SYSTEM _ADMIN	CS_ KNOWLEDGE _WORKER	CS_ SUPPORT _AGENT
CS_Rec_Sol_ Update	Knowledge: Setup: Permission to update Recommended Solutions	YES	YES	
CS_Statement_ View	Knowledge: Search: Permission to view statement	YES	YES	YES
CS_Statement_ Create	Knowledge: Authoring: Permission to create a statement	YES	YES	YES
CS_Statement_ Delete	Knowledge: Authoring: Permission to delete a statement	YES	YES	YES
CS_Statement_ Update	Knowledge: Authoring: Permission to update a statement	YES	YES	YES
CS_Statement_ Global_Update	Knowledge: Authoring: Permission to update statements globally	YES		
CS_Types_View	Knowledge: Setup: Permission to view solution and statement types setup screens	YES		
CS_Types_Edit	Knowledge: Setup: Permission to edit solution and statement types	YES		
CS_USED_ COUNT_UPDATE	Knowledge: search: Permission to update solution used count	YES	YES	YES
CS_Personal_ Profile_Update	Knowledge: Other: Permission to Update Knowledge Management Personal Profile	YES	YES	YES
CS_Sol_Auth_ Profile_Update	Knowledge: Authoring: Permission to Update solution Authoring Profile	YES	YES	YES

Table A–1   Knowledge Management Roles and Permissions

Permissions	Description	CS_ SYSTEM _ADMIN	CS_ KNOWLEDGE _WORKER	CS_ SUPPORT _AGENT
CS_Workflow_ Setup_Update	Knowledge: Setup: Permission to update solution authoring workflow setup	YES		
CS_Worflow_ Setup_View	Knowledge: Setup: permission to view solution authoring workflow setup screens	YES		
CS_Categories_ Update	Knowledge: Setup: Permission to update categories	YES		
CS_Categories_ View	Knowledge: Setup: Permission to view categories	YES		

B

Profile Options

This appendix describes the profile options that are required for the successful implementation of Oracle's Knowledge Management. Topics Include:

Before You Begin

Overview of Setting Profile Options

Setting Profile Options

Oracle's Knowledge Management Profile Options

B.1 Before You Begin

Before doing Oracle Applications Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them by changing to $COMMON_TOP/admin/scripts, and executing adcmctl.sh <APPS username/APPS password> start.

B.2 Overview of Setting Profile Options

As a System Administrator, you can use the System Profile Values window in Oracle Applications Forms to set up profile options for your user community. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities, and bounce the apache server. When you set up a user profile, you provide Oracle Applications with standard information (such as printer) that describes a user, responsibility, application, or site. You can set up values for user profile options at each of the following profile levels.

- Site: Option settings pertain to all users at an installation site.

- Application: Option settings pertain to all users of any responsibility associated with the application.

- Responsibility: Option settings pertain to all users currently signed on under the responsibility.

- User: Option settings pertain to an individual user, identified by their application username.

The values you set up at each level provide run–time values for each user's profile options. An option's run–time value becomes the highest level setting for that option.

When a profile option may be set at more than one level, site has the lowest priority, superseded by application, then responsibility, with user having the highest priority. For example, a value entered at the site level may be overridden by values entered at any other level. A value entered at the user level has the highest priority, and overrides values entered at any other level.

For example, for a given user, assume the printer option is set only at the site and responsibility levels. When the user logs on, the printer option assumes the value set at the responsibility level, since it is the highest–level setting for that option.

> **Note:** As a System Administrator, you should set site level option values before specifying profile options at the other three levels after the installation of Oracle Applications.

The options specified at the site–level work as defaults until the same options are specified at other levels. Application users may use the Personal Profile Values window to set their own personal profile options at the user level. Not all profile options are visible to users, and some profile options, while visible, may not be updated by end users. For more information about profile options, See *Oracle Applications System Administrator's Guide Release 11i.*

B.3 Setting Profile Options

Use the following procedure to set up any profile option.

Steps

1. Log on to Oracle Applications Forms with the System Administrator responsibility.

2. Go to Profile > System. The Find System Profile Values window opens.

3. Check the level(s) at which you want to set the profile option. The available levels are listed below:

    ■   Site

    ■   Application— If you select this level, choose the application from the Application LOV for which you want to set the profile option.

    ■   Responsibility— If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.

    ■   User— If you select this level, choose the user from the User LOV for whom you want to set the profile option.

4. In the Profile field, enter the profile name, such as Knowledge: Active Knowledge Base System, or a wildcard search criterion such as Knowledge%.

5. Click Find. The System Profile Values form opens with the results of your search.

6. Verify or set the profile option(s) at the levels that you selected.

B.4 Oracle's Knowledge Management Profile Options

The following table lists the profile options required for Oracle's Knowledge Management.

Table B–1   Profile Options for Oracle's Knowledge Management

PROFILE_OPTION	Description	Active/Obsoleted
Knowledge: Active Knowledge Base System	Selection for which integrated HTML based Knowledge Base System is being used.	Obsoleted
Knowledge: Allow Knowledge Note Update	Allow the user to update knowledge management notes saved for a service request.	Obsoleted
Knowledge: Default Knowledge Base Solution Type	Controls which default solution type should be when a user enters the agent knowledge base contribution screen.	Active
Knowledge: Knowledge Base Default Contribution Status	Determines the default status of any knowledge objects contributed through the agent knowledge base search module.	Obsoleted
Knowledge: Knowledge Base Search: Maximum Number of Search Results	Maximum number of search results.	Active
Knowledge: Event handler class name for Knowledge Management solved/unsolved actions predefined by other applications	Profile to determine the event handler class to be used for a specific integrating application.It can be predefined by the integrating application or can be setup as a default in Knowledge Management.	Active
Knowledge: Action for Negative Solution Feedback	Profile to determine which action to perform when Not Solved button in View Solution screen is clicked.	Active

Table B–1   Profile Options for Oracle's Knowledge Management

PROFILE_OPTION	Description	Active/Obsoleted
Knowledge: Default Knowledge Base Product Category or Service Set	Determines the product category set from which the product list of values is derived.	Active
Knowledge: Knowledge Base Responsibility when Called from Another Application	This Profile is to map Forms Applications responsibility to Knowledge Management Responsibility for the purpose of calling Knowledge Management UIs from Forms Applications. This is required if you need to make sure KM menu is rendered properly when you come to KM from a Forms application.	Active
Knowledge: Default Distribution Level	Default Distribution Level for both Solution and Statement.	Active
Knowledge: Default Statement Content Type	Default Content Type for a statement.	Active
Knowledge: Default Authoring Flow Name	Default Authoring Flow Name for Solution Authoring.	Active
Knowledge: Default Solution Priority	Default Priority Code for a Solution.	For Future Use
Knowledge: Default Solution Type	Default Solution Type (For Simple Create Solution, this type must have at least one linked mandatory statement type).	For Future Use
Knowledge: Note Type for Copied Solution	This profile determines which note type will be used when a solution content is copied back to the calling application's source document as a JTF NOTE.	Obsoleted

Table B–1   Profile Options for Oracle's Knowledge Management

PROFILE_OPTION	Description	Active/Obsoleted
Knowledge: Action for Positive Solution Feedback	Determines the action to be taken for positive solution feedback.	Active
Knowledge: Statement Display Order on Solutions Details Page	Determines if statements are displayed by type or position on the Solution Details screen.	Active

B.5 Oracle's Knowledge Management System Profile Option Values

The following table lists the values for Oracle's Knowledge Management profile options and the levels on which each has to be set.

Table B–2   Profile Option Names, Levels and Values

Profile_Option_Name	Level	Level_Value	Profile_Option_Value
Knowledge: Allow Knowledge Note Update	Site		N
Knowledge: Default Knowledge Base Solution Type	Site		Symptom, Cause, Action
Knowledge: Knowledge Base Default Contribution Status	Site		Draft
Knowledge: Knowledge Base Search: Maximum number of search results	Site		500
Knowledge: Knowledge Base Search: Maximum number of search results	Application	Oracle Service	500
Knowledge: Action for Negative Solution Feedback	Site		Link Solution as Not Solved
Knowledge: Knowledge Base Responsibility when called from another application	Site		Knowledge Agent-Oracle Service

Table B–2   Profile Option Names, Levels and Values

Profile_Option_Name	Level	Level_Value	Profile_Option_Value
Knowledge: Default Distribution level	Site		Internal
Knowledge: Default Statement Content Type	Site		HTML
Event Handler	Site		Oracle.Apps.CS.Knowledge.Bean.DefaultKMEventHandler
Knowledge: Action for Positive Solution Feedback	Site		Link Solution As Solved
Knowledge: Display Order on Solution Details Page	Site		Position Order

C

Knowledge Management Lookup Types and Lookup Codes

This appendix describes how to add Lookup Codes to Lookup Types in Oracle Applications Forms.

C.1 Viewing Lookup Types for Knowledge Management

Responsibility

Customer Support responsibility

Login

Log in to Oracle Applications Forms.

Steps

1. Log in to Oracle Applications Forms as a system administrator. Responsibilities form appears.

2. Switch responsibility to the Customer Support responsibility.

3. Select Others > Service: Lookup. Oracle Service Lookups Form appears.

4. From the View menu, select Find. Lookup Types pop-up window appears.

5. Enter CS_KB in the Find field. Select OK.

C.2 Configuring the Solution Authoring Flow Status

CS_KB_STATUS lookup type is a fully customizable lookup type for Knowledge Management. Use the following procedure to add lookup codes to this lookup type.

Responsibility
Customer Support responsibility

Login
Log in to Oracle Applications Forms.

Steps
1. Log in to Oracle Applications Forms as a system administrator. Responsibilities form appears.

2. Switch responsibility to the Customer Support responsibility.

3. Select Others > Service: Lookup. Oracle Service Lookups Form appears.

4. From the View menu, select Find. Lookup Types pop-up window appears. Enter CS_KB_STATUS.

5. Search results showing a list of steps for solution authoring flows appear. You can select the steps that you want to enable by checking the check boxes in the Enabled column.

6. Select Save from the File menu.

C.3 Configuring the Search Method

The search methods in Basic and Advanced Search screens can be configured. CS_KB_SEARCH_TYPE_OPTIONS is the lookup that contains a list of lookup values that represent the different search options. Administrators can enable/disable the search values in this lookup and also rename the search options to be available in the Basic and Advanced Search screens. Atleast one search method has to be enabled.

Responsibility
Customer Support responsibility

Login
Log in to Oracle Applications Forms.

Steps
1. Log in to Oracle Applications Forms as a system administrator. Responsibilities form appears.

2. Switch responsibility to the Customer Support responsibility.

3. Select Others >Service >Lookup. Oracle Service Lookups Form appears.

4. From the View menu, select Find. Lookup Types pop-up window appears. Enter CS_KB_SEARCH_TYPE_OPTIONS.

5. Search results showing a list of search options appear. Check the check boxes in the Enabled column to enable the selected options.

6. Select Save from the File menu.

D

Sample File For Knowledge Management Solution Import Program

D.1 Example of a Solution File for the Solution Import Program

Knowledge Management Solution Import Program uses the input xml file name (absolute path) and commit interval (time intervals for commiting the import) parameters for running. The File has to contain the solutions in a XML format and have to be compliant with the Document Type Definition (DTD) for Knowledge Management, cskb_solution.dtd. This program checks the validity of the input xml document. If it is valid, the solutions are created, one after the other. If any data is invalid, the solutions are not created. If processing for a solution fails, its changes are rolled back, and a log error message is written and the next solution in the file is imported. Each new solution to be uploaded can either have a Saved status, or it can be directly published, if the flow information is provided. Only published solutions can be updated, and have a published status after update. Attachments and external links are not supported but Statement Global Update is supported. Any statement with a statement number is globally updated according to the new data specified in the XML document.

```xml
<?xml version="1.0"?>
<!DOCTYPE solution_list SYSTEM "cskb_solution.dtd">
<solution_list>
  <solution>
    <solution_type> Symptom Cause Action</solution_type>
    <solution_distribution>External </solution_distribution>
    <title>Maria's Test Solution 1 (mchui061902b)</title>
    <category>Home&gt;12 World Cup&gt;United States</category>
    <product>Passport Backup Drive</product>
    <product>Windows NT (wrong)</product>
    <platform>Sentinel Standard Desktop</platform>
    <statement>
```

```
            <statement_type>Symptom</statement_type>
            <statement_distribution>External</statement_distribution>
            <content_type>HTML with AutoLink</content_type>
            <summary>mchui061902b - symptom 1</summary>
            <detail></detail>
        </statement>
        <statement_links>
            <statement_no>10386</statement_no>
            <statement_no>34</statement_no>
            <statement_no>10650</statement_no>
        </statement_links>
    </solution>
    <solution>
        <flow>
            <flow_name>Bayu Flow</flow_name>
            <step>Public</step>
        </flow>
        <solution_type> Symptom Cause Action</solution_type>
        <solution_distribution>External </solution_distribution>
        <title>Maria's Test Solution 2 (mchui061902c)</title>
        <category>Home&gt;New Category&gt;New Category 2</category>
        <product>Windows NT</product>
        <product>Windows NT</product>
        <platform>windOWS 95</platform>
        <statement>
            <statement_type>Symptom</statement_type>
            <statement_distribution>External</statement_distribution>
            <content_type>Text with AutoLinks</content_type>
            <summary>mchui061902c - symptom 1</summary>
            <detail>another imported statement - published</detail>
        </statement>
        <statement_links>
            <statement_no>10387</statement_no>
        </statement_links>
        <statement_link_update>
            <statement_no_upd>10386</statement_no_upd>
            <statement_type_upd>Symptom</statement_type_upd>
            <statement_distribution_upd>Internal</statement_distribution_upd>
            <content_type_upd>HTML</content_type_upd>
            <summary_upd>update existing statement summary</summary_upd>
            <detail_upd>global update of statement CLOB</detail_upd>
        </statement_link_update>
    </solution>
    <solution>
        <solution_number>10419</solution_number>
```

```
    <solution_type> Symptom Cause Action</solution_type>
    <solution_distribution>Limited</solution_distribution>
    <title>UPDATED Solution 1000003 yes (updated on 062102)</title>
    <category>Home&gt;New Category&gt;New Category 2</category>
    <product>Windows NT</product>
    <platform>windOWS 95</platform>
    <statement>
      <statement_type>Symptom</statement_type>
      <statement_distribution>External</statement_distribution>
      <content_type>Text</content_type>
      <summary>create new statement </summary>
      <detail>new statement details</detail>
    </statement>
    <statement_link_update>
      <statement_no_upd>10386</statement_no_upd>
      <statement_type_upd>Symptom</statement_type_upd>
      <statement_distribution_upd>External</statement_distribution_upd>
      <content_type_upd>Text with AutoLinks</content_type_upd>
      <summary_upd>global update of statement</summary_upd>
      <detail_upd>statement detail should be globally
updated</detail_upd>
    </statement_link_update>
  </solution>
</solution_list>
```

Glossary

Action

An Oracle's Knowledge Management statement type that contains the solution to an issue. It is a part of the Symptom/Cause/Action solution type.

Accumulate

This search finds documents that contain at least one of the query terms.

All Keywords

This search uses the AND operator. The search results must match all terms in the query.

Answer

A Knowledge Management statement type that contains the solution to an issue. It is a part of the Question/Answer solution type.

Any Keywords

This search uses the OR operator. This search can match one or more query terms.

Attachment

A link from a solution to a supporting item of information that enhances the value of the solution for its users. Attachments can include graphics, scripts, or documents in different file formats.

Authoring Flow

An Authoring Flow in Knowledge Management defines the steps that a solution has to follow in the solution approval or rejection process.

Boolean

In this search you can enter your own Intermedia operators. If you do not enter an operator, this search performs a phrase search.

Category

A knowledge base collection based on an information attribute such as product or version number.

Cause

A Knowledge Management statement type that contains the reason for the solution issue. It is a part of the Symptom/Cause/Action solution type.

Concurrent Manager

A unique facility that manages many time consuming, non interactive tasks within Oracle Applications, so that you do not have to wait for their completion. When you submit a request in Oracle Applications that does not require your interaction, such as releasing shipments or running a report, the Concurrent Manager does the work for you, enabling you to complete multiple tasks simultaneously.

Concurrent Program

A program that runs concurrently (at the same time) as other programs. Concurrent programs run as background processes, while you continue to work at your terminal.

Dynamic Linking

Is the process of linking an object type or a unique identifier within a statement as a link to additional information related to that object type or to that unique identifier.

Fact

A Knowledge Management statement type that contains factual information. Examples are product, version number, operating system, etc.

Find Related Statements

The search method that finds all other statements of the same type that have been previously linked. The results are displayed based on the strength/weight of the link.

Find Similar Statements

A text search that finds matches that are determined by comparing keywords to the summary of the statements in the repository.

Fuzzy

In this search, the query keywords are expanded into a set of similarly spelled keywords, before a search is performed. This search is helpful if there are frequent misspellings of the query keyword in the repository. This search will find incorrect spellings and synonym matches to the query terms.

Intermedia

Oracle InterMedia is a feature that enables Oracle8*i* to store, manage, and retrieve text, documents, geographic location information, images, audio, and video in an integrated fashion with other enterprise information.

It is an Oracle server option that enables text queries to be performed through SQL and PL/SQL.

Knowledge Base

The Knowledge Management database that contains information that can be used to solve issues.

Knowledge Worker

An individual that creates, edits, and technically reviews information within Knowledge Management.

Merchant

A company that has purchased or is using an Oracle application.

Problem

A Knowledge Management statement type that contains the issue of a solution type, typically part of a Problem/Resolution solution type.

Question

A Knowledge Management statement type that contains the issue. It is a part of a Question/Answer solution type.

Relationship

A link between statement types indicating that they have been used together at some time as part of a solution. A statement can have many relationships based on the number of solutions that it is part of.

Resolution

A Knowledge Management statement type that contains the solution. It is a part of a Problem/Resolution solution type.

Responsibility

A level of authority in an application. Each responsibility allows you to access a specific set of Oracle Applications windows, menus, reports, and data to do your role in an organization. Several users can share the same responsibility, and a single user can have multiple responsibilities.

Role

One or more users grouped by a common responsibility or position.

Score

Is also known as relevancy threshold. The text search results match (in percentage) to the original text query.

Solution

Collection of information or statements to solve an issue or answer a question.

Solution Number

Every solution in Knowledge Management is associated with a unique number. This search will find the solution that is associated with the number entered in the search query field.

Solution Score

Each solution is scored based on the text match performed by InterMedia Text and the number of times it has been successfully used to solve issues. These scores are shown as a combined score to indicate the strength of the match to the query entered. The maximum score is 100.

Solution Type

Solutions are organized in solution types to make searches more precise and the results more effective.

Statement

A statement is a description of any aspect of a problem, its cause, or its resolution. A statement has a summary field and a detail field. Statements can be organized into statement types.

Statement Type

Statements can be organized into statement types. It is an identifying name associated with a particular part of a solution type. For example, question is a statement type in a question/answer solution type.

Status

Solutions and statements have a status attribute. This attribute describes the phase of review that the solution or statement has gone through. Common solution statuses are: Draft, Under Edit, Technical Review, Editorial Review, Obsolete, and Published.

Symptom

An Knowledge Management statement type that contains the issue the user is trying to solve. It is a part of the Symptom/Cause/Action solution type.

Theme

This search is also called an *about search* in Intermedia. Intermedia categorizes the documents in its repository into themes, based on their textual content. When this search is performed, the query keywords are compared with the theme index. Documents having the same themes as the keywords appear in the result list.

User

A Knowledge Management user can be an internal or an external user. External users are users that can see published solutions. Internal users include Knowledge Management administrators, knowledge workers and knowledge agents.

Weight

A number that indicates the number of times a statement has been used with other statements to solve an issue

Workflow

Oracle Workflow provides a workflow process to Knowledge Management for solution approval and rejection processes. It is a flexible method for Knowledge Management users to define an authoring flow process steps that are specific to their needs.

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