

# Oracle® Knowledge Management

Implementation Guide

Release 11*i*

**Part No. B12141-01**

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Oracle Knowledge Management Implementation Guide, Release 11i

Part No. B12141-01

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# Send Us Your Comments

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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



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# Preface

## Intended Audience

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

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

- The principles and customary practices of your business area.
- Oracle Knowledge Management

If you have never used Oracle Knowledge Management, Oracle suggests you attend one or more of the Oracle 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 Other Information Sources for more information about Oracle Applications product information.

## How To Use This Guide

This document contains information you will need to understand in order to implement Oracle Knowledge Management.

- Chapter 1: Provides an overview of Oracle Knowledge Management as well as a listing of what's new, what's changed, and what's obsolete in this release.
- Chapter 2: Provides information on related documentation and training as well as an overview of the implementation dependencies.

- Chapter 3: Provides an overview of the various roles and business processes that are utilized in Oracle Knowledge Management. In addition, this chapter provides a listing of the steps necessary to implement Oracle Knowledge Management.
- Chapter 4: Provides implementation steps for implementing Oracle Knowledge Management. In addition, this chapter contains a listing of implementation considerations and a listing of upgrade considerations.
- Chapter 5: Provides a list of verification steps that should be used to validate the implementation.
- Chapter 6: Provides an overview of the product integrations with Oracle Knowledge Management. In addition, this chapter provides a number of setup steps required to enable certain integration functionality.
- Chapter 7: Provides information to help implementers diagnose and troubleshoot issues that they may experience during the implementation process.

## Typographic Conventions

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

Convention	Meaning
<i>italic text</i>	Book titles
Courier text	User commands, file content examples, directory names
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
<b>boldface text</b>	Menu, button, keyboard, and form options, emphasis
< >	Angle brackets enclose user-supplied names. Note: Do not type the angle brackets.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. 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 Corporation 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 code examples in this document. The conventions for writing 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.

**Accessibility of Links to External Web Sites in Documentation** This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

## 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 Knowledge Management.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* 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 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 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 Knowledge Management (and any other Oracle Applications products). This guide also includes information on setting 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.

## **Documents Related to This Product**

### **Installation and System Administration**

#### **Oracle Applications Concepts**

Refer to this guide for an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. 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**

Refer to this guide for instructions on managing the installation of Oracle Applications products. In Release 11*i*, 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 Oracle8*i* 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 11*i*. 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.

### **Oracle Applications Maintenance Procedures**

Refer to this guide for information on configuring your system, maintaining your system, applying patches. You will also find information on migrating files and databases, reporting and tracking, and troubleshooting.

### **Oracle Applications Maintenance Utilities**

Refer to 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 CRM System Administrator's Guide**

Refer to this guide for information on implementing the Oracle CRM Technology Foundation (JTT).

### **Oracle Applications System Administrator's Guide**

Refer to this guide for 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.

### **Oracle Applications Developer's Guide**

Refer to this guide for the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

### **Oracle Applications User Interface Standards for Forms-Based Products**

Refer to this guide for the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

## **Other Implementation Documentation**

### **Multiple Reporting Currencies in Oracle Applications**

Refer to this guide if you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Knowledge Management. This manual details additional steps and setup considerations for implementing Oracle Knowledge Management with this feature.

### **Multiple Organizations in Oracle Applications**

Refer to this guide for descriptions of how to set up and use Oracle Knowledge Management with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Knowledge Management.

### **Oracle Alert User's Guide**

Refer to this guide for information on defining periodic and event alerts to monitor the status of your Oracle Applications data.

### **Oracle Workflow Guide**

Refer to this guide for information on defining new workflow business processes as well as customizing 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 Applications Flexfields Guide**

Refer to this guide for flexfields planning, setup and reference information for the Oracle Knowledge Management implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

### **Oracle eTechnical Reference Manuals**

eTechnical Reference Manuals (eTRMs) contain database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

### **Oracle Manufacturing APIs and Open Interfaces Manual**

Refer to this manual for up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

### **Oracle Order Management Suite APIs and Open Interfaces Manual**

Refer to this manual for up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

### **Oracle Applications Message Reference Manual**

Refer to this manual for descriptions of Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

### **Oracle Common Application Components Implementation Guide**

Refer to this guide to implement common application components leveraged by the CRM suite of products. These include Resource Manager, Notes, Spreadtable, Assignment Manager, Task Manager, Calendar, escalation Manager, Business Rule Monitor, and User Management.

### **Oracle Common Application Components API Reference Guide**

Refer to this guide for information on the public APIs for Resource Manager, Task Manager, and Notes.

### **Oracle Common Application Components User's Guide**

Refer to this guide for information on using the common application components leveraged by the CRM suite of products. These include Resource Manager, Notes, Spreadtable, Assignment Manager, Task Manager, Calendar, escalation Manager, Business Rule Monitor, and User Management.

### **Oracle Knowledge Management and Related Product Documentation**

In addition to the technology related guides listed above you can find a listing of documentation for Oracle Knowledge Management and the related products in Section 2.1, "Related Documentation and Training".

## Training and Support

### Training

Oracle offers training courses to help you and your staff master Oracle 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 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 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.

### Oracle*MetaLink*

Oracle*MetaLink* 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 Oracle*MetaLink*, 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 Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Top Tech Docs/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: Top Tech Docs/ERP Applications/Applications Installation and Upgrade.

## Do Not Use Database Tools to Modify Oracle Applications Data

***Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.***

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## 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.



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# Introduction

This chapter provides an introduction to Oracle Knowledge Management. The sections in this chapter include:

- Section 1.1, "Oracle Knowledge Management Overview"
- Section 1.2, "Oracle Knowledge Management Key Features"
- Section 1.3, "Oracle Knowledge Management Integrations"
- Section 1.4, "New in this Release"
- Section 1.5, "Changed in this Release"
- Section 1.6, "Obsolete in This Release"
- Section 1.7, "Oracle Knowledge Management System Requirements"

## 1.1 Oracle Knowledge Management Overview

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

Oracle Knowledge Management currently provides solution management functionality to other Oracle Applications like Oracle iSupport, Oracle TeleService, 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 Oracle 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 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 Appendix A, "Oracle Knowledge Management Seed Data".

## 1.2 Oracle Knowledge Management Key Features

Oracle Knowledge Management includes the following features:

### **Integration With Other Oracle Applications**

Oracle Knowledge Management is integrated with other Oracle Applications like Oracle iSupport, Oracle TeleService, 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.

### **Multiple Search Methods**

Oracle Knowledge Management can be configured so that users can choose a searching method. The search methods include All Keywords, Any Keywords, Fuzzy Match, Theme, Accumulate, Intermedia, and Reference Number. A query can consist of a single or multiple search terms, the latter separated by spaces.

Oracle Knowledge Management uses Oracle Text for text searching.

### **Product, Platform, or Category Specific Search of Solutions**

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

Product and platform fields on the Advanced Search user interface allows a user to focus the search and obtain results that contain the specific product and/or platform as well as solutions that are generic for all products and/or platforms.

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

### **Finding Matching Statements/Solutions**

While creating a statement, you can find matching statements in the knowledge base to prevent duplication.

### **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.

### **Creating and Searching by Multiple Solution Types**

Information in Oracle Knowledge Management is organized into solutions, that is a collection of statements. You can create multiple solution types to organize solutions. You can also search by either symptom/cause/action (default) solution type or any other solution type, such as problem/resolution, that you create.

### **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 Oracle Knowledge Management system checks and prevents the creation of duplicate solutions or statements.

### **Categorization of Solutions**

In Oracle Knowledge Management, solutions are segregated 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 choose a category or a subcategory during search to focus the search to a specific information area.

### **Adding Attachments, External Links, and/or Comments to Solutions**

This feature allows Knowledge Workers, Knowledge Administrators, and Customer Service Representatives (internal users) to add supporting and related information, links to other objects to a solution to enhance its usefulness.

Comments are used by solution reviewers as a communication channel.

### **Solution Scoring**

Each solution is scored based on the text match performed by Oracle Text. The maximum score is 100. Solution scores vary depending on the search method being used.

## **1.3 Oracle Knowledge Management Integrations**

Oracle Knowledge Management integrates with the following Oracle Applications:

- Oracle TeleService
- Oracle Depot Repair
- Oracle Field Service
- Oracle iSupport
- Oracle eMail Center
- Oracle Quality Online
- Oracle Partners Online

For information on how these products integrate with Oracle Knowledge Management, refer to Chapter 6, "Oracle Knowledge Management Integrations".

## 1.4 New in this Release

This section details what is new in this release.

### 1.4.1 New Features/Functions

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

#### **Unified Search (within Basic Search)**

In this release the unified search functionality within the Basic Search pages enables searching across multiple repositories using key words. The unified searching functionality will search across Solutions and Forums and has the ability to cover additional repositories with further setup by the administrator.

Also, a new profile option called Default Searching Method sets the default searching method for the user. This default search method also controls the searching method for all search repositories in Basic Search that leverages Intermedia search.

#### **Hide Platform Section**

A new profile option has been created to allow the administrator to hide the Platform section throughout the application.

If the platform is hidden, it is hidden from View Solution, Advanced Search, and Create/Update Solution pages. All solutions updated afterward will have the platform attributes removed if they initially had any platform attributes.

#### **Enabling/Disabling Authoring Flows**

You can now enable or disable the authoring flows that have been created.

#### **Viewing the In-Progress Version of a Solution**

When viewing the published solution (from Search), you can, with relevant permission, switch to view the in-progress version if the solution is being edited.

#### **Guest User Support**

The Guest User concept allows unregistered or registered users to access certain features without having to log in.

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**Note:** Guest User support in Oracle Knowledge Management is made possible through the Oracle iSupport interface.

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A Guest User is a user who comes to the site and does not log in explicitly, but implicitly to the applications to use certain functionality. The Knowledge Management Guest User will be able to use the following pages at specified locations (URLs) without explicitly logging in to the applications:

- Basic Search and Browsing Pages
- Search Result Pages
- View Solutions Detail page

When a normal user has not logged in to the applications but uses the URL to open any of the above pages, the application will render the page in guest user mode, with the login icon. Users can log in to see pages for their respective role and permissions.

Refer to the *Oracle iSupport User Guide* for more information.

### User Interface Configuration

You can now configure the Browser, Search Results, and Solution Detail pages in Oracle Knowledge Management using the Oracle iSupport interface. For more information, refer to the section Section 4.8.4, "Functions for Configuring Oracle iSupport Pages", and also to *About Oracle iSupport in Oracle Service Family Pack I*.

## 1.4.2 New Profile Options

The following new profile options have been added in this release. For a complete description of the Oracle Knowledge Management Profile Options refer to Table B-1, "Profile Options for Oracle Knowledge Management":

**Table 1-1 New Profile Options**

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User_Profile_Option_Name
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Knowledge: Select Authoring Flow

Knowledge: Concurrent Search Mode for Unified Search

Knowledge: Default Distribution Level (CS\_KB\_DEFAULT\_ACCESS\_LEVEL)

Knowledge: Default Authoring Flow

**Table 1–1 New Profile Options**

<b>User_Profile_Option_Name</b>
Knowledge: Display QuickFind
Knowledge: Default Search Relevancy
Knowledge: Available Repositories for Search
Knowledge: Display Search Option List
Knowledge: Expose Search Related Solutions Button
Knowledge: Default Searching Method
Knowledge: Display Platform Attributes
Knowledge: Default Solution Type for Authoring

## 1.5 Changed in this Release

This section details what has changed in this release.

### 1.5.1 Changed Features/Functions

The following features/functionality have been changed in this release of Oracle Knowledge Management:

#### **Search Results in Basic and Advanced Search for Solutions**

Solution search results in Basic and Advanced Search has been refined to show only solutions that have been published. For solutions that are being edited, the published version is presented.

#### **Improved Usability for Browsing Categories**

Oracle Knowledge Management now presents an improved user interface for solution browsing. Bread crumb navigation allows improved navigation to and from previous pages.

#### **Common View Solution Detail Page**

The presentation and format of the View Solution page now appears consistent whenever a knowledge solution is viewed within Oracle Knowledge Management or called from Oracle iSupport, Oracle TeleService, or Oracle Depot Repair.

## Enhanced Solution Advanced Search Page

The user interface for Advanced Search has been streamlined to provide a better layout and interaction of components. Searching similar and related Statements using the Advanced Search has also been enhanced.

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**Note:** The Solution Advanced Search was previously named Advanced Search.

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## Display of Solutions Using Advanced Search

A new profile option (Knowledge: Expose Search Related Solutions Button) allows you to search only for Related solutions. If this profile is turned off, when performing an advanced search, the system returns both Matching and Related solutions for the selected search statements combined into a single search result list.

## The Statement Detail Page

The Statement Detail for Solution page has been refined to provide a better layout and presentation of information.

## Improved Solution Submission to Authoring Flows

The solution authoring process has been revised. A new profile option (Knowledge: Select Authoring Flow) has been created for the administrator to select a default authoring flow. Solutions are submitted directly to the default flow if the default flow is set up, and the profile option Knowledge: Select Authoring Flow is turned off. This solution submission enhancement simplifies the solution contribution process for users, who are not knowledge workers, when they want to contribute solutions to the knowledge base.

If the profile, Knowledge: Select Authoring Flow, has been turned on, and you submit a solution, a list of all the available flows is displayed from which to choose. These usability improvements apply to the process in which solutions are:

- Initially submitted to an authoring flow
- Re-submitted to an authoring flow

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**Note:** When you submit a solution to an authoring flow, it is submitted to the first step of the flow.

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## **The Create/Update Solution Detail Page**

The Create/Update Solution Detail page has been revised to provide you with a consistent application look and feel, flow, page layout, and component interaction. The error handling and duplication checking of solutions and statements during the create/update solution process has also been improved. When you now try to create a new statement, an automatic search takes place to make sure that the statement does not already exist. If the statement already exists, the existing statement automatically replaces the new statement just entered.

## **Solutions in Progress**

Knowledge Workers can now easily find and manage solutions by using Table Views of solutions in progress. These views include:

- Solutions I'm currently working on: The solutions you are currently working on and/or the solutions you have checked out for editing.
- Solutions in progress I can check out for editing: The solutions you are eligible to work on (check out).
- All solutions in progress: All the solutions in progress.

Additionally, improvements have been made to the Solution in Progress Search page available from the Solution in Progress subtab. If you cannot find the desired solutions in progress through one of the views mentioned above, the Search Solutions in Progress page with updated search options can be used to find the solutions.

## **End Dating Solution and Statement Types**

The knowledge administrator can now end date solution and statement types. End dating a statement or solution type will prevent any further statements or solutions of this type from being created. Solutions or statements currently in progress will be allowed to complete.

Such functionality allows you to maintain the knowledge base over time by performing general housekeeping on solutions and statements types. End dating a solution or statement type does not mean that the solution or statement type has been deleted. Instead, it is considered a soft delete that can be revoked by removing the end date on the solution or statement type at any point in time.

## 1.5.2 Changed Pages

With this release the Oracle Knowledge Management user interface has undergone considerable usability and presentation enhancements. This is in keeping with Oracle's Browser Look and Feel standards.

The result is a modification to screens for all Oracle Knowledge Management user types. The few major changes in the user interface including renamed tabs and subtabs are listed in Section 1.5.5, "Changed Menus".

## 1.5.3 Changed Profile Options

The following profile options have changed in this release. For a complete description of the Oracle Knowledge Management Profile Options refer to Table B-1, "Profile Options for Oracle Knowledge Management":

**Table 1-2 Changed Profile Options**

<b>New User_Profile_Option_Name</b>	<b>Former User_Profile_Option_Name</b>
Knowledge: Maximum Number of Search Results	Knowledge: Knowledge Base Search: Maximum Number of Search Results.
Knowledge: Event handler class name for a calling application	Knowledge: Event Handler class name for KM solved/unsolved actions predefined by other apps
Knowledge: Default Product Category Set	Knowledge: Default Knowledge Base Product Category Set
Knowledge: Default Solution Type for Authoring	Knowledge: Default Solution Type
Knowledge: User Responsibility when Calling KM from Another Application	Knowledge: Knowledge Base Responsibility when Called from Another Application

## 1.5.4 Changed Concurrent Programs

The Knowledge Management Index Synchronization Program has been changed to synchronize the new forum index within Oracle Text.

## 1.5.5 Changed Menus

The following tabs/subtabs in Oracle Knowledge Management have been renamed:

Former Release Tab Name	Current Release Tab Name
Search	Knowledge
Basic Search	Knowledge
Statement Search	Statements
Work Pending	Solutions in Progress

## 1.5.6 Changed Responsibilities

You can now access Oracle Knowledge Management from an HTML login screen or a PHP login screen. With this release, the Available from Setting has been changed from Oracle Applications to Oracle Self Service Web Applications for the following responsibilities:

- Knowledge Administrator
- Knowledge Agent
- Knowledge Worker

## 1.6 Obsolete in This Release

This section details what is obsolete in this release.

### 1.6.1 Obsolete Profile Options

The following profile options are obsolete in this release.

**Table 1–3 Obsolete Profile Options**

Profile Options
Knowledge: Default Authoring Flow Name
Knowledge: Default Distribution Level (CS_KB_SMP_SOL_ACCESS_LEVEL)
Knowledge: Default Statement Content Type
Knowledge: Default Solution Priority

## 1.7 Oracle Knowledge Management System Requirements

The hardware and software components required to implement Oracle Knowledge Management largely depend on your particular installation. For information on system requirements refer to the *Installing Oracle Applications* manual and the *Oracle Applications CRM System Administrator's Guide*.

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## Before You Begin

This chapter describes resources and dependencies that you will need to be familiar with before you implement Oracle Knowledge Management. The sections in this chapter include:

- Section 2.1, "Related Documentation and Training"
- Section 2.2, "Oracle Knowledge Management Dependencies"
- Section 2.3, "Installation and Dependency Verification"

### 2.1 Related Documentation and Training

In addition to the technology related guides listed within the "Other Information Sources" section of the Preface, the following guides provide information about Oracle Knowledge Management and the products that integrate with Oracle Knowledge Management:

- *Oracle Knowledge Management User Guide*
- *Oracle iSupport User Guide*
- *Oracle iSupport Implementation Guide*
- *Oracle TeleService User Guide*
- *Oracle TeleService 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 Field Service User Guide*
- *Oracle Field Service Implementation Guide*

For information on how these products integrate with Oracle Knowledge Management, refer to Chapter 6, "Oracle Knowledge Management Integrations".

## 2.2 Oracle Knowledge Management Dependencies

This section describes mandatory and optional dependencies for Oracle Knowledge Management.

### 2.2.1 Mandatory Dependencies

Oracle Knowledge Management integrates with other Oracle application modules to provide and extend its functionality. In order for Oracle Knowledge Management to run you will need to set up the following mandatory applications/modules:

1. Access Application
2. Oracle Application Object Library
3. Oracle CRM Technology Foundation
4. Oracle Text
5. Oracle Human Resources
6. Oracle Common Application Components
  - a. Task Manager
  - b. Resource Manager

#### **Access Application**

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

- Oracle Depot Repair
- Oracle eMail Center
- Oracle Field Service

- Oracle iSupport
- Oracle Partners Online (from the Support tab in iSupport)
- Oracle Quality Online
- Oracle TeleService (from the Support module)

### **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. Oracle 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 Foundation**

Oracle 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 CRM Technology Foundation (JTT) profile options. Refer to the latest version of *Oracle Applications CRM Administrator's Guide* for more information. The CRM Technology Foundation stack is also known as the HTML Stack or Tech Stack.

### **Oracle Text**

You must set up Oracle Text (formerly known as Oracle InterMedia Text) to use Oracle Knowledge Management's search functionality.

Oracle Text 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.

For more information about Oracle Text, navigate to:

- <http://otn.oracle.com/products/text/content.html>

### **Oracle Human Resources**

Oracle Knowledge Management uses Oracle Human Resources to get employee data. Define or confirm the definitions of your employees in Oracle Human Resources Management System. Refer to the Oracle Human Resources Management System documentation for more information:

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

### **Oracle Common Application Components**

Oracle Knowledge Management leverages the following Oracle Common Application Components (formerly referred to as CRM Application Foundation):

- Task Manager
- Resource Manager

#### **Task Manager**

All Oracle CRM products use 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 *Oracle Common Application Components Implementation Guide* for more information.

### **Resource Manager**

Resource Manager is used in Oracle 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.

Refer to the *Oracle Common Application Components Implementation Guide* for more information.

## **2.2.2 Conditional Dependencies**

The following Oracle E-Business Suite modules can be set up to provide additional functionality:

1. Notes (Oracle Common Application Components)
2. Oracle Workflow
3. Oracle Inventory

### **Notes**

The Notes module is used in Oracle 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.

Refer to the *Oracle Common Application Components Implementation Guide* for more information.

### **Oracle Workflow**

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. Refer to the *Oracle Workflow Guide* for more information.

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

### **Oracle Inventory**

Oracle 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, refer to the *Oracle Inventory User's Guide*.

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

- Knowledge: Default Product Category Set
- Service: Default Platform Category Set

## **2.2.3 Dependency Setup Checklist**

The following table provides a suggested order for setting up the Oracle Knowledge Management dependencies. You must perform the required steps. The optional steps are may be necessary if you plan to use the related features or complete certain business functions.

**Table 2–1** *Dependency Setup Checklist*

<b>Step</b>	<b>Required/Optional</b>
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 Text	Required
Set Up an Access Application	Required
Set Up Oracle CRM Technology Foundation	Required
Set Up Task Manager	Required
Set Profile Options for Oracle Knowledge Management	Required

**Table 2–1** *Dependency Setup Checklist*

Step	Required/Optional
Set Up Oracle Knowledge Management	Required

### Accessing Oracle Forms

Some setups for Oracle 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 Oracle 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.



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## Implementation Overview

This chapter provides an overview of how Oracle Knowledge Management is accessed, the associated job roles and process flows, and also provides a summary of the implementation tasks. The sections in this chapter include:

- Responsibilities, Menus, and Tabs
- Job Roles and Process Flows
- Implementation Tasks

### 3.1 Responsibilities, Menus, and Tabs

Oracle Knowledge Management allows users that are internal to the company, such as Knowledge Workers and Customer Service Agents, as well as users that are external to the company, such as customers. All users can search for published solutions in the Oracle Knowledge Management repository. Each type of user in Oracle Knowledge Management has a defined set of permissions.

Roles determine screen-level permissions and reflect a user, such as a Knowledge Worker. Roles are made up of permissions which control viewing a page, displaying a section/region within a page, and can even control button displays. Responsibilities control 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, such as customers.
- Internal users are employees and they include Customer Service Agents, Knowledge Workers, and Knowledge Administrators.

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

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

<b>Responsibility</b>	<b>Functional Role</b>	<b>Description</b>	<b>Menus</b>	<b>Tabs</b>	<b>Subtabs</b>
CS_KB_KNOWLEDGE_WORKER	Knowledge Worker	Creates, edits, and technically reviews information in Knowledge Management	CS_KB_TOP_KW_MENU	Knowledge, Authoring	Knowledge, Statements, Create Solution, Solutions in Progress, Top Solutions
CS_KB_AGENT	Customer Service Agent	Interfaces with customers to record their problems and provides them existing solutions or creates new solutions	CS_KB_TOP_AG_MENU	Knowledge, Authoring	Knowledge, Create Solution, Solutions in Progress,
CS_KB_SYS_ADMIN	Knowledge Administrator	An administrator with all Knowledge Management specific permissions including setup and other process oriented permissions	CS_KB_TOP_MENU	Knowledge, Authoring, and Setup	Knowledge, Statements, Create Solution, Solutions in Progress, Top Solutions, Solution Types, Statement Types, Create Type, Categories, Authoring Flows, Frequently Used Definitions

## 3.2 Job Roles and Process Flows

The following process flows are designed to provide you with a general, high-level understanding of the tasks that Knowledge Administrators, Knowledge Workers, and End Users perform within Oracle Knowledge Management. For detailed information on performing these tasks within the application refer to the *Oracle Knowledge Management User Guide*.

Table 3–2, "Job Roles and Process Flows Matrix" provides a cross reference of the process flows and the associated job roles.

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**Note:** Customer Service Agents perform many of the same tasks in Oracle Knowledge Management as Knowledge Workers, but will typically have a more limited scope in the Solution Authoring process.

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**Table 3–2 Job Roles and Process Flows Matrix**

Process Flows	Knowledge Administrator Flows	Knowledge Worker Flows	Customer Service Agent	End User Flows
Creating Authoring Flows	YES	NO	NO	NO
Managing the Knowledge Base Structure	YES	NO	NO	NO
Creating Top Solutions for Oracle iSupport Users	YES	YES	NO	NO
Authoring a Solution	NO	YES	YES	NO
Review Solutions in Progress	YES	YES	NO	NO
Updating an Existing Solution	NO	YES	YES	NO
Searching the Knowledge Base				
Conducting a Basic Search (also known as a Unified Search)	YES	YES	YES	YES
Browsing Solution Categories	YES	YES	YES	YES

Process Flows	Knowledge Administrator Flows	Knowledge Worker Flows	Customer Service Agent	End User Flows
Conducting an Advanced Search	YES	YES	YES	NO
Searching for Statements	YES	YES	NO	NO
Viewing Top Solutions in Oracle iSupport	NO	YES	YES	YES

### 3.2.1 Knowledge Administrator Flows

The primary functions that Knowledge Administrators perform within Oracle Knowledge Management are as follows:

- Manage the Knowledge Base Structure
- Create Authoring Flows
- Set Up Top Solutions for iSupport Users

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**Note:** Knowledge Administrators also perform some of the processes associated in this chapter with Knowledge Workers and End Users. Refer to Section 3–2, "Job Roles and Process Flows Matrix" for a more complete listing of the tasks that a Knowledge Administrator may perform.

The flows listed in this section are primary responsibilities of the Knowledge Administrator.

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The following flows provide a graphical representation of these processes.

#### Managing the Knowledge Base Structure

The knowledge base structure provides the basis for partitioning information within the knowledge base. Its main components are Solution Types, Statement Types, and Solution Categories. The following flows provide a graphical representation of the tasks associated with setting up the knowledge base structure.

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**Note:** Designing the knowledge base structure is a very important aspect of implementing Oracle Knowledge Management. Once Solutions have been added to the Solution Categories it is difficult to change the knowledge base structure.

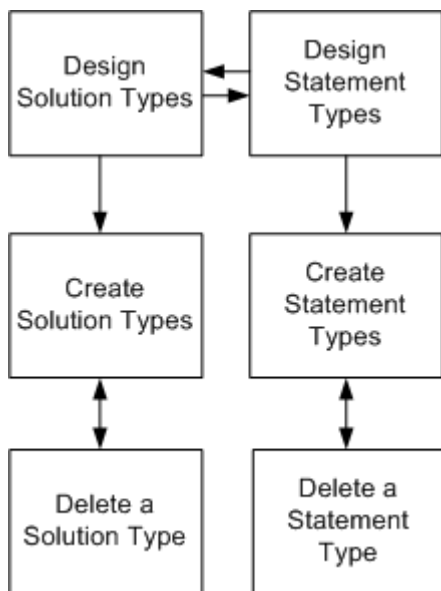
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### Setting Up Solution Types and Statement Types

Solution Types and Statement Types provide a structure for organizing the type of information that comprises solutions and statements within the knowledge base.

**Figure 3-1** *Setting Up the Solution Types and Statement Types*



Although Solution Types and Statement Types are created separately they are interrelated and should be designed in conjunction with one another:

- **Design Solution Types:** Determine the number of Solution Types and the Statement Types that each Solution Type will include.
- **Design Statement Types:** Determine the number of Statement Types and a description of the content that will comprise the Statement Type.

Once the Knowledge Administrator designs the Solution Types and Statement Types he will need to create the actual structures:

- Create Solution Types: Add Solution Types to knowledge base. You must associate at least one Statement Type to a Solution Type.
- Create Statement Types: Add Statement Types to the knowledge base.

In order to manage the knowledge base Knowledge Administrators will also need to know how to do the following:

- Delete a Solution Types: Delete a Solution Type from the knowledge base. You cannot delete a Solution Type if there are solutions associated with the Solution Type.
- Delete a Statement Types: Delete a Statement Type from the knowledge base. You cannot delete a Statement Type that is associated with a solution in the knowledge base.

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**Note:** Solution Types and Statement Types are interrelated. Deleting these structures is not a common task in managing the knowledge base.

Solutions Types can be end dated when they are obsolete or no longer valid. End dating the type will take effect on the date specified by the Knowledge Administrator. Once the type has been end dated, no new solutions of that type can be created. however, solutions of that type will remain in the knowledge base, and can be searched and edited.

Statement Types can be end dated when an associated Solution Type is end dated. The Statement Type may not be end dated if there are relationships with other Solution Types that are still valid.

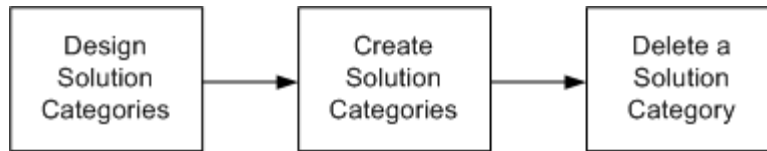
Once a Solution Type or Statement Type has been end dated, you cannot use that type in your search criteria.

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### **Setting Up Solution Categories**

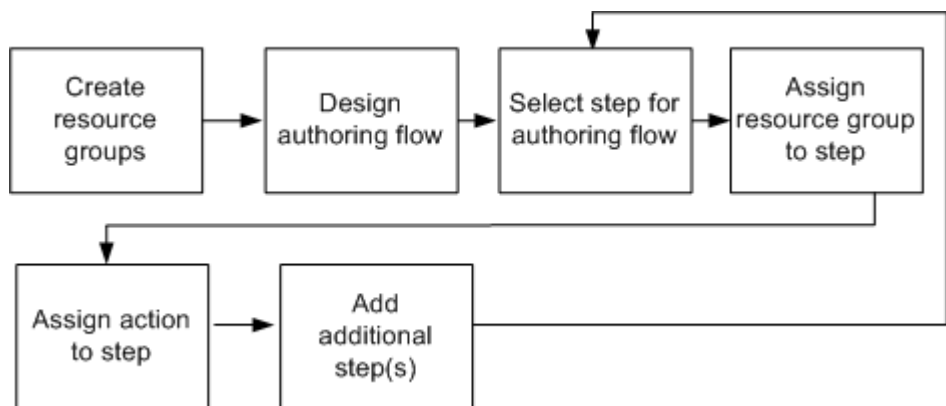
Solution Categories are essentially folders that can be used to sort solutions into logical groupings.

**Figure 3–2 Setting Up Solution Categories**

- Design Solution Categories: Determine how many solution categories and the names of the solution categories.
- Create Solution Categories: Create Solution Categories.
- Delete a Solution Categories: Delete a Solution Category from the knowledge base. You cannot delete a Solution Category that has an associated solution.

### Creating Authoring Flows

Authoring Flows are used to automate the review and publication of solutions within the knowledge base. The following is a graphical representation of the process used to create authoring flows:

**Figure 3–3 Create Authoring Flows**

To create an authoring flow knowledge administrators perform the following tasks:

- **Create resource groups:** Create groups of users that can be assigned to a steps within the authoring flow process. For example, create a group called Editorial Reviewers, responsible for performing editorial reviews of solutions.
- **Design authoring flow:** Design the number of steps, their order within the authoring flow, the resource group associated with each step, and the action following each step.

Before designing an authoring flow, it is important to understand which review steps and actions you can choose from.

- **Select step for authoring flow:** Add steps to the authoring flow, for example, Editorial Review.
- **Assign action to step:** Assign an action to the step, for example Publish.
- **Assign resource group to step:** Assign the group that is responsible for performing a particular step within the authoring flow.
- **Select additional step:** Add as many steps as you need to construct the authoring flow.

### **Creating Top Solutions for Oracle iSupport Users**

Knowledge Administrators can mark certain solutions as 'Recommended'. Recommended Solutions are a list of solutions that are recommended for end users to view. Solutions included on this list might include fixes for a recently discovered product issue. Users navigating to the Top Solutions subtab in Oracle iSupport can view a listing of Recommended Solutions as well as a list of Frequently Used Solutions. Frequently Used Solutions is a separate list of solutions based on usage counts.

The following is a graphical representation of the tasks that a Knowledge Administrator must perform to manage the lists within the Top Solutions subtab.

#### **Top Solutions: Recommended Solutions List**

The Recommended Solutions list is a list of solutions selected by the Knowledge Administrator to display in Oracle iSupport.

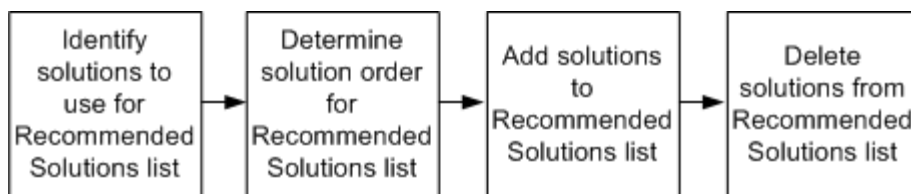
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**Note:** Adding Recommended Solutions is often performed by a Knowledge Worker and not a Knowledge Administrator.

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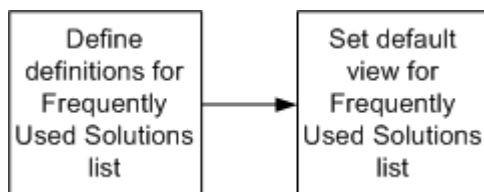
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**Figure 3–4** *Creating Recommended Solutions for Oracle iSupport Users*

- Identify solutions to use for Recommended Solutions list: Identify how many and which solutions to include on the Recommended Solutions list. This may involve working with Knowledge Workers to determine the solutions that will be most useful to users.
- Determine solution order for Recommended Solutions list: Determine what order the solutions will display in Oracle iSupport.
- Add solutions to the Recommended Solutions list: Add the solutions to the Recommended Solutions lists. The list is set up in Oracle Knowledge Management and displayed in Oracle iSupport.
- Delete Solutions from the Recommended Solutions list: Delete solutions as part of an ongoing maintenance of the Recommended Solutions list.

### **Top Solutions: Frequently Used Solutions List**

The Frequently Used Solutions list is based on usage counts. Although there is a default view in Oracle iSupport, the view for these counts can be changed by selecting a new date range from a drop down list. These date ranges or definitions are created within Oracle Knowledge Management. In addition, the default view or date range is also set in Oracle Knowledge Management.

**Figure 3–5** *Defining Definitions for Frequently Used Solutions for Oracle iSupport Users*

- Define definitions for Frequently Used Solutions: Create date ranges such as, within the last year, for display in the Frequently Used Solutions drop down list that displays in Oracle iSupport. This drop down controls the date range of the frequently used solutions that are displayed.
- Set default view for Frequently Used Solutions: Select the date range or definition that you would like to use as the default view for the Frequently Used Solutions list in Oracle iSupport.

### 3.2.2 Knowledge Worker Flows

The primary functions that Knowledge Workers perform within Oracle Knowledge Management are as follows:

- Author solutions
- Review solutions
- Update existing solutions
- Search the knowledge base

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**Note:** Knowledge Workers also perform some of the processes associated in this chapter with Knowledge Administrators and End Users. Refer to Section 3–2, "Job Roles and Process Flows Matrix" for a more complete listing of the tasks that a Knowledge Worker may perform.

The flows listed in this section are the primary responsibilities of the Knowledge Worker.

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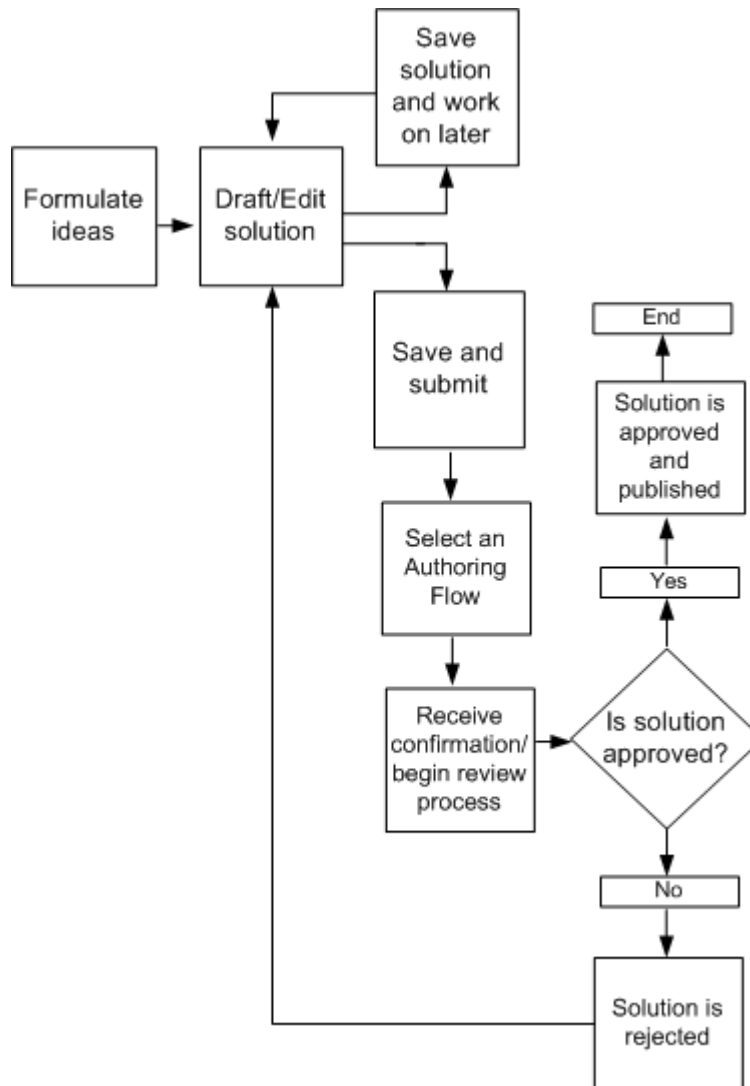
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The following flows provide a graphical representation of these processes.

#### **Authoring a Solution**

Solutions are the cornerstone of the knowledge base and Knowledge Workers are generally responsible for managing content within the knowledge base. The following is a graphical representation of the tasks associated with creating a solution.

*Figure 3–6 Authoring a Solution*



Solution authoring involves the following tasks:

- **Formulate ideas:** Determine the solutions that need to be created.
- **Draft/Edit solution:** Write solution content and assign associated attributes to create a solution within Oracle Knowledge Management. You can review

solutions that you are currently working on and have saved from the Solutions in Progress page.

- Save and work on later: Save the solution so that you may work on it later.
- Save and submit solution to authoring flow: Save changes and submit the solutions to a step/status in the authoring flow, for example, Publish.
- Select an authoring flow: Submit the solution to an authoring flow where it is reviewed and edited.
- Receive confirmation/begin review process: Review confirmation that the solution has been submitted to a step within one of the Authoring Flows. You can review the status of the solution on this confirmation page. For example, if you submit the solution back to the initial draft or authoring step in an Authoring Flow the status will indicate that the solution has been 'Rejected to Author'.
- Is the solution approved?: Track whether solution is approved at each step of the authoring flow.
- Solution is approved and published: Solution is approved at each step of the authoring flow. This is done by a members of the Resource Groups that have been assigned to each step in the authoring flow. The Resource Group assigned to the step before Publish can determine when a solution is ready for publishing.
- Solution is rejected: Solution is rejected back to author for modification. The solution will need to be saved and submitted again.

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**Note:** Knowledge Workers may also need to obsolete a solution in the knowledge base during the solution lifecycle.

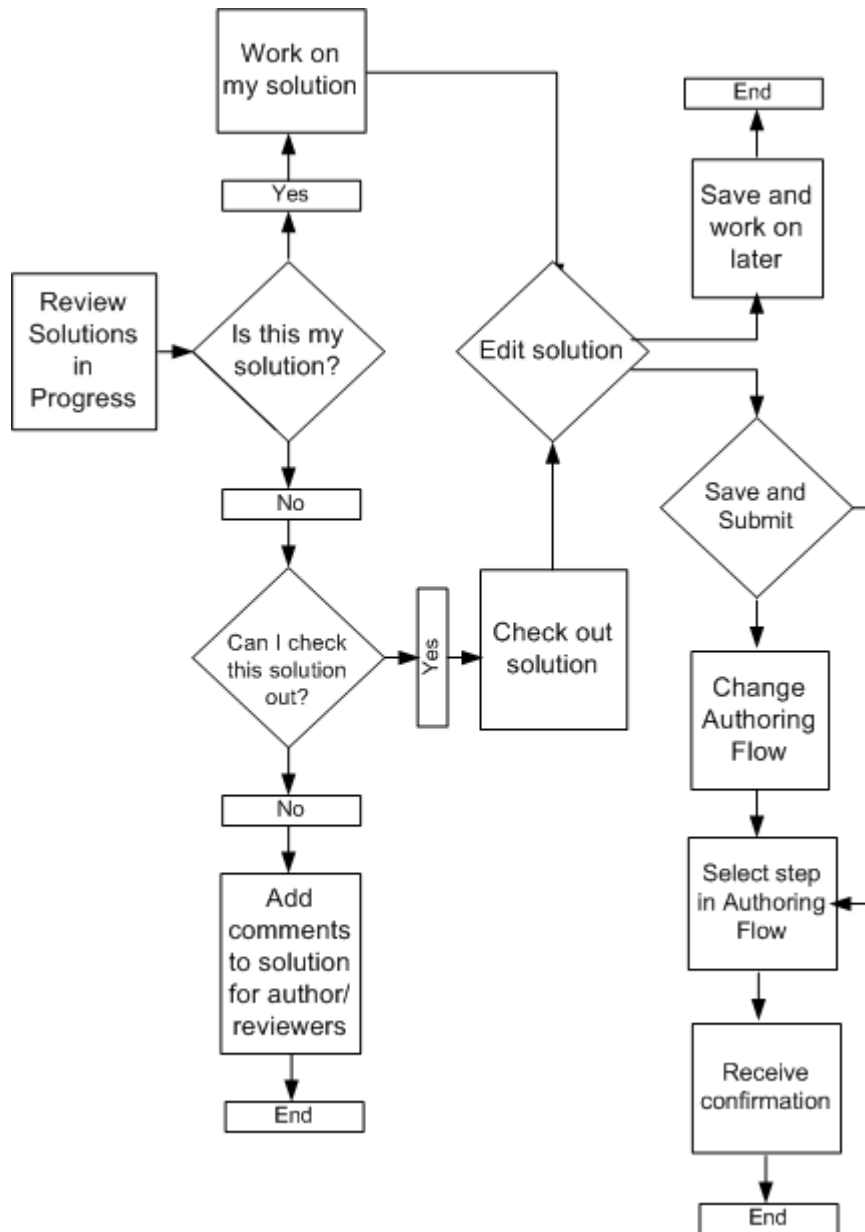
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### **Review Solutions in Progress**

One of the critical responsibilities of a Knowledge Worker is authoring and reviewing solutions. The following is a graphical representation of the tasks associated with reviewing a solution.

Figure 3-7 Reviewing Solutions in Progress



Reviewing a solution involves the following tasks

- Review solutions in progress: Review the Solutions in Progress subtab for a listing of solutions that are currently being authored. Views include Solutions that I am currently working on, Solutions that I can check out for editing, and All solutions in progress.
- Is this my solution: Determine if this is a solution that you have drafted or checked out. You can view the solutions you are currently working on by selecting the 'View solutions that I'm currently working on' view from the Solutions in Progress page.
- Work on my solution: Modify or update a solution on which you are currently working.
- Can I check this solution out: Determine whether you have proper permissions and whether you can approve the solution that someone else has authored.
- Add comments to solution for reviewers: If you cannot check out the solution you can add comments for viewing by other reviewers. These comments will not be published.

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**Note:** You can also add comments to a solution that you are editing.

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- Check out solution: Check out the solution for editing. This will lock the solution, so that no other Knowledge Workers will be able to check out the solution while you have it checked out.
- Edit solution: Modify the solution. You will need sufficient permissions to edit a solution.
- Save and work on later: Save the solution so that you may work on it later.
- Save and submit solution to authoring flow: Save changes and submit the solutions to a step/status in the authoring flow, for example, Publish. This step effectively checks the solution back in so that other Knowledge Workers can check out the solution.

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**Note:** The preceding diagram summarizes the flow for viewing a Solution in Progress that has not already been published. For solutions that have been published and have subsequently been checked out, the user will be prompted to select an authoring flow after selecting the Save and Submit button rather than selecting a step in the current flow.

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- **Change Authoring Flow:** Determine whether you want to submit the solution to a new Authoring Flow.

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**Note:** The Knowledge: Select Authoring Flow profile option must be set to Yes in order for you to have the ability to select an Authoring Flow. Otherwise, the solution is submitted to the default Authoring Flow.

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- **Select step in Authoring Flow:** Select a step/status in the authoring flow, for example, Publish.

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**Note:** An updated solution can be rejected back to the author by submitting the solution back to the initial draft or authoring status.

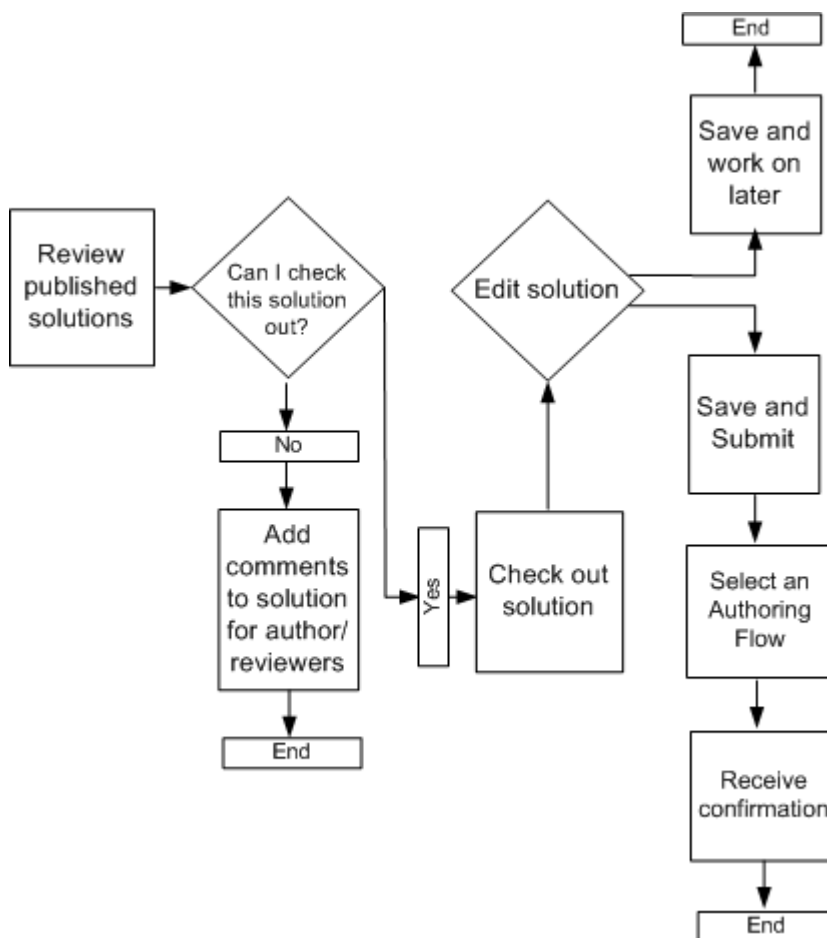
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- **Receive confirmation:** Review confirmation that the solution has been submitted to a step within one of the Authoring Flows. You can review the status of the solution on this confirmation page. For example, if you submit the solution back to the initial draft or authoring step in an Authoring Flow the status will indicate that the solution has been 'Rejected to Author'.

### **Updating an Existing Solution**

Knowledge Workers can also update an existing or published solution. The following is a graphical representation of the tasks associated with updating an existing solution

**Figure 3–8 Updating an Existing Solution**

Updating an existing solution involves the following tasks:

- Review published solutions: Search for and review a published solution.
- Can I check this solution out: Determine whether you have proper permissions to check out a solution and edit it.
- Add comments to solution for reviewers: If you cannot check out the solution you can add comments for viewing by other reviewers. These comments will not be published

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**Note:** You can also add comments to a solution that you are editing.

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- Check out solution: Determine whether you have proper permissions and whether you can approve the solution that someone else has authored.
- Edit solution: Modify the solution.
- Save and work on later: Save the solution so that you may work on it later.
- Save and submit solution to authoring flow: Save changes and submit the solutions to a step/status in the authoring flow, for example, Publish. This step effectively checks the solution back in so that other Knowledge Workers can check out the solution.
- Select an Authoring Flow: Select an Authoring Flow to submit the edited solution for review.

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**Note:** The Knowledge: Select Authoring Flow profile option must be set to Yes in order for you to have the ability to select an Authoring Flow. Otherwise, the solution is submitted to the default Authoring Flow.

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- Receive confirmation: Review confirmation that the solution has been submitted to an Authoring Flow. You will be able to see to which flow the solution has been submitted by checking the status listed on the confirmation.

### **Searching the Knowledge Base**

Knowledge Workers will frequently need to search the knowledge base in order to maintain its relevancy. As part of this process, the Knowledge Worker will need to determine the search criteria and subject matter and which type of search to conduct. Oracle Knowledge Management offers several ways to search the knowledge base. The following is a graphical representation of the searches that can be performed within Oracle Knowledge Management.

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**Note:** All users of Oracle Knowledge Management will perform at least a subset of these search functions.

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**Figure 3–9 Searching the Knowledge Base**

Type of Search	Usage	Objectives/Results
Perform a Basic Search (or Unified Search)	Knowledge Administrator Knowledge Worker Customer Service Agent End User	Key Word Published Solutions Solution Categories Forums Across Repositories
Perform an Advanced Search	Knowledge Worker Customer Service Agent	Related Statements Matching Statements Ability to Add Filters Published Solutions
Search Solutions in Progress	Knowledge Worker	Solutions in Progress
Search for Statements	Knowledge Administrator Knowledge Worker	Published Statements

**Figure 3–10 Searching the Knowledge Base**

Searching the knowledge base can be accomplished using different searching criteria:

- **Basic Search:** Basic Search allows you to enter key words to perform a unified search for solutions across multiple repositories within the knowledge base. By

default, Solutions, Forums, and Categories are the repositories available for search.

The Basic Search performs a key word search of the solution title, solution number, statement title, and statement description. For categories a key word search is performed across the title. For forums a key word search is performed across the message subject, message body, and message number.

From the Basic Search page you can also browse Solution Categories. Solution Categories are a way to organize the knowledge base. Solution Categories allow you to navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base.

**Advanced Search:** Advanced Search allows you to search for solutions that meet specific user defined criteria. This is a more comprehensive search that enables you to set conditions, filters, and incorporate similar and identical statements into your search. Solutions are made of statements and the advanced search allows users to find solutions using statements as the search criteria. The advanced search can search similar statements or solutions based on a statement. From a given statement, users can find any other solution that uses this statement.

- **Solutions in Progress:** Solutions in Progress (formerly known as Work Pending in prior versions of Oracle Knowledge Management) is a search that is specifically designed to search draft or solutions that are not yet published. This search functionality is not available to calling applications directly, although users accessing from calling applications can navigate to this page by using the menu. Solutions in Progress can be viewed and searched from the Solutions in Progress page. Solutions in progress include solutions that have been saved but have not been submitted for approval as well as solutions that have not been approved for publishing.
- **Statement Search:** By searching for a statement you can find the related solutions containing that statement. This process is typically only utilized by Knowledge Workers and Knowledge Administrators and is a useful way to find statements using statement numbers. The Knowledge Administrator can use this search to find a statement in order to perform a global update while the Knowledge Worker can only use this page to find a statement. In most cases, it is more useful to search for statements in conjunction with the Solution Advanced Search page rather than using the Search Statements page.

### 3.2.3 End User Flows

End Users searching the knowledge base will access Oracle Knowledge Management through the Support tab in Oracle iSupport. End Users will typically perform the follow tasks:

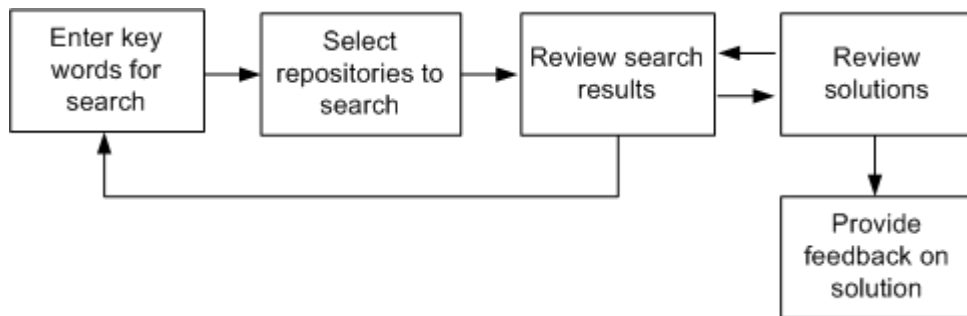
- Conduct a Basic Search (also known as a Unified Search)
- Browse Solution Categories
- Review the Top Solutions in Oracle iSupport

The following flows provide a graphical representation of these processes.

#### Conducting a Basic Search (also known as a Unified Search)

The majority of End Users searching the knowledge base will conduct a key word search using the Basic Search (also known as Unified Search) functionality. The following is graphical representation of the tasks associated with conducting a basic search.

**Figure 3–11 Conducting a Basic Search**



Conducting a Basic Search involves the following tasks:

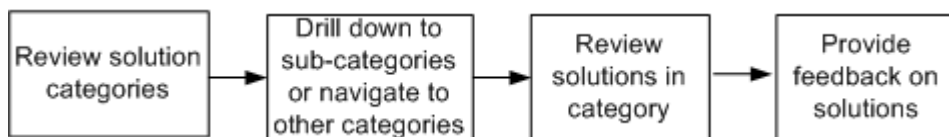
- Enter key word for search: Enter a key word or words.
- Select a repository or multiple repositories to search: Select a repository such as Solutions. Similarly, the user can decide to select all repositories.
- Review search results: Review search results and decide whether or not to modify the search by entering new key words.
- Review solutions: Review solutions displayed within the search results.

- Provide feedback: Indicate whether solution helps to solve your problem by clicking a response at the bottom of the Solution Detail page. This information is captured in usage counts that populate the Frequently Used Solutions list.

### Browsing Solution Categories

From the Basic Search page, End Users can browse Solution Categories that are similar to folders for solutions. The following is graphical representation of the tasks associated with browsing Solutions Categories.

**Figure 3–12 Browsing Solution Categories**



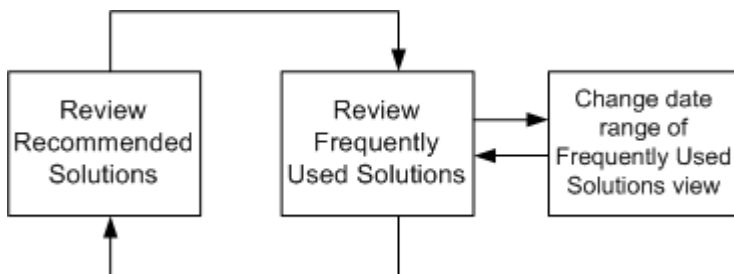
Browsing Solution Categories involves the following tasks:

- Review solution categories: Review solution categories to determine where you might find solutions that meet your needs.
- Drill down to sub-categories or navigate to other categories: Choose a sub-category or select another category.
- Review solutions in category: Review solution headers and detail to find an appropriate solution.
- Provide feedback on solution: Indicate whether solution helps to solve your problem by clicking a response at the bottom of the Solution Detail page. This information is captured in usage counts that populate the Frequently Used Solutions list.

### Viewing Top Solutions in Oracle iSupport

End Users can navigate to a list of Recommended Solutions and Frequently Used Solutions from the Top Solutions subtab in Oracle iSupport. The following is a graphical representation of the tasks associated with viewing Top Solutions within Oracle iSupport

**Figure 3–13 Viewing Top Solutions in Oracle iSupport**



Users of Oracle iSupport can navigate to the Top Solutions subtab to review two lists of solutions:

- **Review Recommended Solutions:** View a list of recommended solutions. The Recommended Solutions list is a list of solutions selected by the Knowledge Administrator to display in Oracle iSupport.
- **Review Frequently Used Solutions:** View a list of frequently used solutions. The Frequently Used Solutions list is based on usage counts.
- **Change date range of Frequently Used Solution view:** Update the view for Frequently Used Solutions list by selecting a date definition or range from a drop down list. These date definitions or ranges are defined by Knowledge Administrators within Oracle Knowledge Management

### 3.3 Implementation Tasks

You will need to complete the following setup steps in order to implement Oracle Knowledge Management. These steps are in addition to Installation and Dependency Verification list noted in Chapter 2, "Before You Begin",

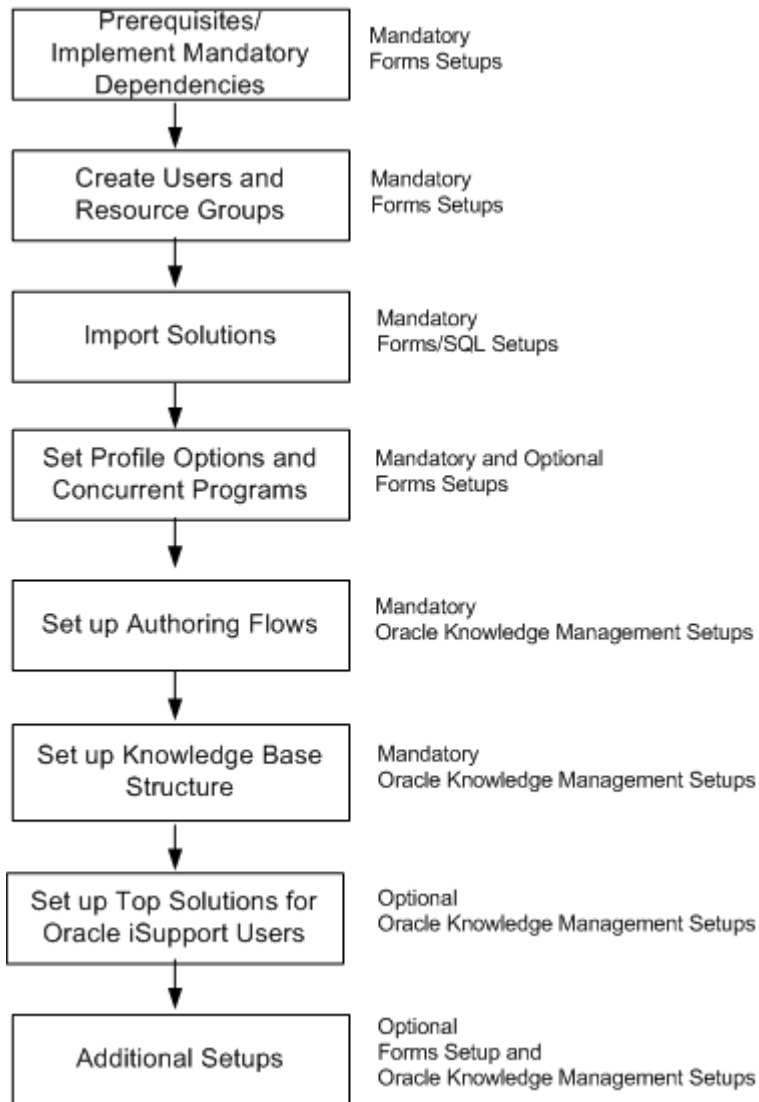
**Table 3–3 Implementation Tasks**

<b>Task</b>	<b>Reference</b>	<b>Mandatory/ Optional</b>	<b>Setup</b>
Prerequisites/ Implement Mandatory Dependencies	Chapter 2, "Before You Begin"	Mandatory	Forms
Create Users and Resource Groups	Section 4.2, "Creating Users and Resource Groups"	Mandatory	Forms
Import Solutions	Section 4.3, "Importing Solutions"	Mandatory	Forms/SQL
Set Profile Options and Concurrent Programs	Section 4.4, "Setting Profile Options and Concurrent Programs"	Mandatory/ Optional	Forms
Set Up Authoring Flows	Section 4.5, "Setting Up Authoring Flows"	Mandatory	Oracle Knowledge Management
Set Up Knowledge Base Structure	Section 4.6, "Setting Up the Knowledge Base Structure"	Mandatory	Oracle Knowledge Management
Set Up Top Solutions for Oracle iSupport Users	Section 4.7, "Setting Up Top Solutions for Oracle iSupport Users"	Optional <b>Note:</b> You must have either added or imported solutions into the knowledge base in order to perform this setup.	Oracle Knowledge Management
Additional Setups	Section 6.2, "Additional Integration Setups"	Optional	Forms/Oracle Knowledge Management

### Implementation Steps Flow

The following diagram is a graphical representation of the implementation steps described in Table 3–3, "Implementation Tasks"

**Figure 3–14 Implementation Steps Flow**



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# Implementation Tasks

This chapter includes the implementation tasks required to set up Oracle Knowledge Management. The sections in this chapter include:

- Section 4.1, "Prerequisites and Mandatory Dependencies"
- Section 4.2, "Creating Users and Resource Groups"
- Section 4.3, "Importing Solutions"
- Section 4.4, "Setting Profile Options and Concurrent Programs"
- Section 4.5, "Setting Up Authoring Flows"
- Section 4.6, "Setting Up the Knowledge Base Structure"
- Section 4.7, "Setting Up Top Solutions for Oracle iSupport Users"
- Section 4.8, "Implementation Considerations"
- Section 4.9, "Upgrade Considerations"

## 4.1 Prerequisites and Mandatory Dependencies

For a list of prerequisite and mandatory dependencies refer to Chapter 2, "Before You Begin".

## 4.2 Creating Users and Resource Groups

The System Administrator creates users for Oracle Knowledge Management including the Knowledge Administrator. Subsequently, the Knowledge Administrator will need to create Resource Groups which are required for automating the authoring flow lifecycle. In order to create a Resource Group you must do the following:

1. Create a user
2. Associate a user with an employee
3. Create a resource for an employee.
4. Create a Resource Group

Below are details on how to create a Knowledge Administrator as well as how to create a Resource Group.

### 4.2.1 Creating a Knowledge 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 Administrator, Vision Enterprises, (CS\_KB\_SYS\_ADMIN), to the user who is the Knowledge Administrator. This user performs setups and maintenance for Knowledge Management.

**Role:** The role assigned to the Knowledge 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 Administrator both must be imported as a resource into CRM Application Foundation Resources to be utilized by Knowledge Management.

#### Setting up a User as a Knowledge 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 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.

### 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 Administrator role (CS\_SYSTEM\_ADMIN) to the new Knowledge 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 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:

- *Oracle Applications CRM Administrator's Guide*

## 4.2.2 Creating Resource Groups

In order to automate the solution authoring process you must set up Authoring Flows in Oracle Knowledge Management. Each authoring flow consists of a series of steps which must be completed by a member of an assigned Resource Group before a solution can be published. A Resource Group can include one or more users and in order to create a Resource Group you will first need to create a user, associate a user with an employee, and create a resource for an employee.

### **Example 4-1 Resource Group Example**

A software company creates an authoring flow that requires all solutions to have a technical review and an editorial review prior to publication. In order to ensure that the proper controls are in place the company sets up three Resource Groups.

- **Technical\_Reviewers:** Responsible for technical accuracy of a solution.
- **Editorial\_Reviewers:** Responsible for formatting and editing content.
- **Solution\_Publishers:** Responsible for providing final review and approval prior to publication.

## 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.

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

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- 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 iSupport.
- e. Save the record.

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**Note:** Employee Resources and Resource Groups can be setup in HTML. For information on creating Employee Resources and Resource Groups in HTML refer to the Oracle Common Application Components Implementation Guide.

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## 4.3 Importing Solutions

Use the Knowledge Management Solution Import Program to load solutions into Oracle Knowledge Management. This program is a concurrent program which means that it runs simultaneously with other programs and/or tasks. A complete description of the Knowledge Management Solution Import Program is described in *Section 4.4.2, "Running Concurrent Programs"*. Appendix D, "Sample File For Knowledge Management Solution Import Program", contains a sample file for the Solution Import Program.

## 4.4 Setting Profile Options and Concurrent Programs

One of the critical components of implementing Oracle Knowledge Management is setting the Profile Options and understanding how to use the Concurrent Programs.

## 4.4.1 Setting 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.

### Profile Options for Knowledge Management

Oracle Knowledge Management has its own set of profile options.

- For a listing of all Knowledge Management profile options, their descriptions and how to set them up, refer to Appendix B, "Profile Options".
- For a listing of new Profile Options in this release of Oracle Knowledge Management refer to Section 1.4.2, "New Profile Options"
- For a listing of changed profile options in this release of Oracle Knowledge Management refer to Section 1.5.3, "Changed Profile Options"
- For a listing of obsoleted profile options in this release of Oracle Knowledge Management refer to Section 1.6.1, "Obsolete Profile Options"

## 4.4.2 Running Concurrent Programs

Concurrent programs run simultaneously with other programs and/or tasks.

### Concurrent Programs for Knowledge Management

The following list describes the Concurrent Programs used for Oracle Knowledge Management:

- **Knowledge Management Index Synchronization Program** to synchronize the Oracle Text index to display the solutions in the search process. With this release, the Index Synchronization program also synchronizes the new forum index.

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**Note:** Newly published solutions are not automatically indexed into the search process, which means that, although a solution has been approved for publishing it may not be searchable. Knowledge Administrators should run the Knowledge Management Index Synchronization program to add newly published solutions to the index.

If an existing published solution is revised and republished, the solution is not searchable until the Index Synchronization program is run.

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- **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"

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**Note:** The Knowledge Management Solution Import Program is not used by Knowledge Workers. It is typically run once at the beginning of an implementation.

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### **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.

### **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.

### **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 Authoring Flows

In order to automate the solution authoring process you must set up Authoring Flows in Oracle Knowledge Management. Each authoring flow consists of a series of steps which must be completed by a member of an assigned Resource Group before a solution can be published.

### *Example 4–2 Authoring Flow Example*

A health and fitness equipment manufacturer company creates an authoring flow that requires all solutions in the knowledge base to have an editorial review and marketing approval prior to publication. In addition, the company would like to ensure the legal review team has final authority on publication of a solution. In order to ensure that the proper controls are in place the company sets up three steps in the authoring flow and associates a unique resource group to each step. The table below details the steps and resource groups assigned.

**Table 4–1 Authoring Flow Example**

Authoring Flow Step Name	Resource Group Assigned
Format and Edit Review	Editorial_Reviewers
Marketing Approval	Marketing_Approval
Publish	Legal_Reviewers

For information on setting up Authoring Flows refer to the *Oracle Knowledge Management User Guide*.

## 4.6 Setting Up the Knowledge Base Structure

In order to effectively manage Oracle Knowledge Management it is critical to spend some time designing the structure of the knowledge base. Oracle Knowledge Management allows you to set up structures that help organize and partition information within the knowledge base. Creating a knowledge base structure that is

either overly complex or simple will minimize the effectiveness of the knowledge base.

The knowledge base is comprised of a series of solutions which contain statements that are designed to help solve problems. In order to organize how solutions are created and identified, Oracle Knowledge Management requires that all statements be associated to a statement type and all solutions be associated to a solution type. Each solution type must have at least one statement type associated to it. In addition, Oracle Knowledge Management provides the ability to create Solution Category folders to help organize the knowledge base.

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**Note:** Solution Types represent the types of solutions in the knowledge base. Statement Types are then associated to these Solution Types to help form the structure for the solutions.

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Following is a description of Solution Types, Statement Types, and Solution Categories. You can find more information on setting up these structures in the *Oracle Knowledge Management User Guide*.

### **Statement Types**

The most granular level of information in the knowledge base is a statement. Statements are the main source of information contained within the solution. Each statement is classified into a statement types that helps identify the type of information contained in the statement. An example of a statement type is an Action, or a statement that directs the user to do a particular task in order to solve an issue.

#### ***Example 4–3 Statement Type Example***

Statement Type: Action

- Action Statement: Replace ink cartridge in printer

### **Solution Types**

Similarly, solutions are assigned to solution types that classify the solution. The solution type identifies the mandatory statement types contained within the solution. The default solution type is the Symptom/Cause/Action which by definition contains at least one Symptom statement, one Solution statement, and one Action statement.

**Example 4–4 Solution Type Example**

Solution Type: Symptom/Cause/Action

- Symptom Statement: Printer is not printing clearly
- Cause Statement: Ink cartridge is low
- Action Statement: Replace ink cartridge in printer

**Solution Category**

After a solution is created it can be filed into a Solution Category folder that contains a set of related solutions. An example, a solution that covers replacing a printer ink cartridge might be filed into a Solution Category folder called Printers with similar solutions.

**Example 4–5 Solution Category Example**

Solution Category: Printers

- Solution 100: Printer is not Printing Properly
- Solution 150: Printer has a Paper Jam
- Solution 999: Printer is Offline

## 4.7 Setting Up Top Solutions for Oracle iSupport Users

Within the Oracle iSupport user interface a user can navigate to a subtab called Top Solutions. From the Other Recommended Solutions page users can view a list of Frequently Used Solutions as well as a list of Recommended Solutions.

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**Note:** You must have either added or imported solutions into the knowledge base in order to perform this setup.

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- Frequently Used Solutions are populated based on usage counts captured in Oracle Knowledge Management as well as by the date definition set up within Oracle Knowledge Management.
- Recommended Solutions are a listing of solutions chosen by a Knowledge Administrator or Knowledge Worker and set up in Oracle Knowledge Management.

For information on defining dates for Frequently Used Solution or information on setting up Recommended Solutions refer to the *Oracle Knowledge Management User Guide*.

## 4.8 Implementation Considerations

The following implementation considerations should be taken into account before implementing of Oracle Knowledge Management

### 4.8.1 Customizing Messages

Oracle Knowledge Management utilizes Oracle Workflow. You can only customize messages that are used in workflow.

### 4.8.2 Setting Up Guest Users

The Guest User concept allows unregistered or registered users to access certain features within Oracle Knowledge Management without having to log in.

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**Note :** Guest User Support in Oracle Knowledge Management is made possible through the Oracle iSupport interface.

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A Guest User is a user who comes to the site and does not log in explicitly, but implicitly to the applications to use certain functionality. The Knowledge Management Guest User will be able to use the following pages at specified locations (URLs) without explicitly logging in to the applications:

- Unified Search and Browsing Pages
- Search Result Pages
- View Solutions Detail page

When a normal user has not logged in to the applications but uses the URL to open any of the above pages, the application will render the page in guest user mode, with the login icon. Users can log in to see pages for their respective role and permissions.

Refer to the *Oracle iSupport Implementation Guide* for more information.

### 4.8.3 Defining the Unified Search Repositories

With Basic Search (also known as Unified Search) you can search from different repositories. To plug in different repositories into the Unified Search you will need to do the following.

#### Login

System Administrator Console within the CRM Technology Foundation (JTT).

#### Responsibility

CRM HTML Administration

#### Steps

1. Define the new repository in JTT QuickFind framework.
2. Append the category of the new repository to the profile option 'Knowledge: Available Repositories'. The category of the new repository is the value of the JTT property 'service.<classpath>.categories'.

For more information refer to the *Oracle Applications CRM System Administrator's Guide*.

3. Bounce the web server

### 4.8.4 Functions for Configuring Oracle iSupport Pages

You can configure the high-level look and feel of the user interface (UI) for the Browser, Search Results, and Solution Details pages that are exposed in Oracle iSupport by defining the appropriate JSP name in the FND functions listed below:

- Top: Indicates JSP will display at the top of the content page.
- Left: Indicates JSP will display at the left of the content page.
- Right: Indicates JSP will display at the right of the content page.
- Bottom: Indicates JSP will display at the bottom of the content page.

Refer to the *Oracle iSupport Implementation Guide* for more information.

#### Browse Pages Functions

- CS\_KB\_BROWSE\_TOP\_FN - Top section of Browse page
- CS\_KB\_BROWSE\_LEFT\_FN - Left section of Browse page

- CS\_KB\_BROWSE\_RIGHT\_FN - Right section of Browse page
- CS\_KB\_BROWSE\_BOTTOM\_FN - Bottom section of Browse page

### **Search Pages Functions**

- CS\_KB\_SEARCH\_RESULT\_TOP\_FN - Top section of Search Result page
- CS\_KB\_SEARCH\_RESULT\_LEFT\_FN - Left section of Search Result page
- CS\_KB\_SEARCH\_RESULT\_RIGHT\_FN - Right section of Search Result page
- CS\_KB\_SEARCH\_RESULT\_BOTTOM\_FN - Bottom section of Search Result page

### **Solution Detail Functions**

- CS\_KB\_SOLN\_DETAIL\_TOP\_FN - Top section of Solution Detail page
- CS\_KB\_SOLN\_DETAIL\_LEFT\_FN - Left section of Solution Detail page
- CS\_KB\_SOLN\_DETAIL\_RIGHT\_FN - Right section of Solution Detail page
- CS\_KB\_SOLN\_DETAIL\_BOTTOM\_FN - Bottom section of Solution Detail page

## **4.9 Upgrade Considerations**

The following upgrade considerations should be taken into account before upgrading Oracle Knowledge Management:

### **Text Indexes**

While patching to upgrade Oracle Knowledge Management the Oracle Text indexes used by Oracle Knowledge Management will be dropped and recreated. This may extend patching times if a lot of solutions are contained in the system.

### **Platform Attributes**

If you set the profile option Knowledge: Display Platform Attributes to No, all solutions updated afterward will have the platform attributes removed if they initially had any platform attributes.

### **Original Author Columns**

CS\_KB\_SETS\_B has two new columns that will be updated for existing solution version rows.

- ORIGINAL\_AUTHOR

- ORIGINAL\_AUTHOR\_DATE

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**Note :** This new feature will impact existing transactions in the system.

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These columns represent the author and creation date of the solution's first version. For solution versions, the last update date and updated by information is stored in the standard who columns against each solution version.

For existing solutions, these column values will be derived from the CREATED\_BY and CREATION\_DATE of the first solution version. The default value for these new columns as new solution versions are created will be ORIGINAL\_AUTHOR and ORIGINAL\_AUTHOR\_DATE of the first solution version.

### Link Type Column

The LINK\_TYPE column in CS\_KB\_SET\_LINKS now cannot be nullified and defaults to PS (Possibly Useful). The existing solution link data rows that are null are updated to reflect this. The default value of LINK\_TYPE (PS) can be changed later using the TeleService applications to Useful or Not Useful.

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**Note :** This new feature will impact existing transactions in the system.

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### Data Rows

The data rows that link an attachment to a solution will be migrated from CS\_KB\_SET\_LINKS (object code = CS\_KB\_FND\_LOBS) to the standard FND owned attachment tables.



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# Verifying Knowledge Management Implementation

## 5.1 Verification of Knowledge Management Implementation

To check that you have implemented Oracle 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 the Oracle 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:
  - a. Create, view, and update a solution type.

- b. Create, view, and update a statement type.
  - c. Associate, and disassociate a statement type to a solution type.
  - d. Relate statement types to note types via an external links.
  - e. Create and modify categories.
  - f. Create a new authoring flow, and edit an existing authoring flow.
  - g. Create a solution.
  - h. Create a statement.
  - i. Submit a solution to an authoring flow.
  - j. View and search Solutions in Progress.
  - k. Publish a solution.
9. Verify that you can perform the following steps:
- a. Add or update frequently used definitions for solutions.
  - b. Set up recommended solutions.
10. Verify that you can perform the following tasks in Knowledge Management:
- a. Basic search (also known as a Unified Search).
  - b. Advanced search
  - c. Search for a statement

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# Oracle Knowledge Management Integrations

This chapter provides an overview and a list of all products with which Oracle Knowledge Management integrates. In addition, the chapter provides additional setup steps required for integrating with Oracle Knowledge Management. The sections in this chapter include:

- Section 6.1, "E-Business Suite Integrations"
- Section 6.2, "Additional Integration Setups"

## 6.1 E-Business Suite Integrations

Oracle 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, Oracle 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 Oracle Knowledge Management as a powerful solution management tool. Solutions created in Oracle Knowledge Management are immediately available to users of all applications that integrate Oracle 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 Oracle Knowledge Management has with several Oracle products allows the users of these modules to easily move data between applications.

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

Oracle Knowledge Management also integrates with Oracle iSupport which enables users of Oracle iSupport to resolve their own service issues.

## 6.1.1 Forms-Based Applications

### 6.1.1.1 Oracle TeleService

Oracle TeleService (Support module) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. Oracle TeleService uses Oracle 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 Oracle Knowledge Management. A solution created in Oracle Knowledge Management can also be linked to a Service Request. 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.

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**Note :** Only those note types that have been mapped to statement types will be used as search criteria

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The following information from the service request is passed to the Solution Advanced Search page.

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

See the latest version of *Oracle TeleService User Guide* for more information.

#### **6.1.1.2 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.

#### **6.1.1.3 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 Oracle Knowledge Management for a solution and creates a task based on the problem description and action needed to solve the problem.

See the latest version of *Oracle Field Service User Guide* for more information.

## 6.1.2 HTML-Based Applications

### 6.1.2.1 Oracle iSupport

Oracle iSupport 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 iSupport integrates with Oracle Knowledge Management to search for published solutions. A service request agent using Oracle iSupport can search for solutions while creating a service request. Oracle iSupport customers can also search Oracle 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.

See the latest version of *Oracle iSupport User Guide* for more information.

### 6.1.2.2 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.

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.

See the latest version of *Oracle eMail Center User Guide* for more information.

### 6.1.2.3 Oracle Partners Online

Oracle Partners Online is the entry point for Partner Relationship Management (PRM) services across the pre-sales, sales and post-sales inter-company processes for companies and their partners. These services include partner profiling and opportunity matching for the vendor, and online access to latest product collateral as well as sales and service support for the partners.

Users of Oracle Partners Online can access the Support tab in iSupport. See the latest versions of *Oracle Partners Online User Guide* and *Oracle iSupport User Guide* for more information.

### 6.1.2.4 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 Oracle Knowledge Management, then an OQO agent can navigate to Oracle Knowledge Management. Published notes in the defect can also be copied to Oracle Knowledge Management, if the Defect Note Types had been mapped to Oracle Knowledge Management statement types.

Oracle 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.

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**Note:** Oracle Quality Online is supported but no migration is offered.

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## 6.2 Additional Integration Setups

The following setups are designed to take advantage of the integration points within the Oracle E-Business Suite.

### 6.2.1 Mapping a Statement Type to a Note Type

The Notes is a Common Application Component within the Oracle E-Business Suite. It is seeded with a set of predefined note types which can be used throughout

the Oracle e-Business Suite. Individuals with the 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 TeleService User Guide* for more information.

Each Note Type can be mapped to one Statement Type. This mapping is used to translate notes from other objects, especially service requests, into statement types in Knowledge Management.

### **Responsibility**

Knowledge Administrators with edit permissions (CS\_Type\_Edit) can relate a statement type to a JTF note type.

### **Prerequisite**

This integration is primarily used with Oracle TeleService.

### **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.

## **6.2.2 Setting Up Note Token Rules (also known as AutoLinks)**

Setting up Note Token Rules in Oracle Quality Online allows you to define parsing rules and destinations for hyperlinking keywords in the Note Details display. This is known as an AutoLink in Oracle Knowledge Management.

AutoLinks define a set of key token words, for example, *bug* that maps to an html object in the database. If the word *bug* has been created as a note token rule, when a solution is authored containing *bug* and an unique parameter (the bug number), for

example *bug: 10020*, Knowledge Management will automatically create a hyperlink to that object in the database.

AutoLinks allows you to create links automatically to other objects in the database which is useful in building a knowledge base where information is linked together.

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**Note:** For statement details with content type *Text with Autolink*, you cannot use the characters listed below as the preceding or following characters: < > " ' % ; ( ) & !

However, you can use these characters as the preceding or following characters for statement details with content type *HTML with Autolink*.

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To create Token Rules:

## Login

Navigate to the Oracle Applications login page at:

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

## Responsibility

Quality Online Administrator

## Prerequisites

None.

## Steps

1. Navigate to Token Rules > Summary.
2. Click Create Token Rule.
3. Type a unique Name in the Name text field.
4. Type a description in the Description text field.
5. In the Token section, type the keyword to hyperlink in the Value field. (a name for the linked text, e.g. http://, etc.)
6. Set Preceding and Following Delimiting Characters. The Preceding Delimiting Characters distinguish your token value from identical text values, and the

Following Delimiting Characters determine where the hyperlink stops. Any combination of Following Characters are allowed between Token Value and Parameter, if any.

7. In the Parameter section, use the Type list to choose a Parameter type Alphanumeric, Numeric or No Parameter.
8. Enter the Following Delimiting Characters for the parameter, if desired, and/or check the appropriate delimiting boxes. If No Parameter is selected, then the Following Characters, Minimum Length, and Maximum Length options are not allowed
9. Enter your minimum and maximum length parameters
10. In the Destination section, choose a Type using the list. If your type is Function, choose a User Function Name using the list. If your type is URL, enter the base url in the Base URL text field.
11. Click Create. The token rule displays on the Token Rules summary page.

In order for this token rule to be leveraged in Knowledge Management, it must be mapped to the Knowledge Base Solution object in the database.

To map a token rule to an object:

12. Click the Mapping sub tab. The Token Rule Mapping page displays.
13. Select the Knowledge Base Solution value from the Object list and click Go. The page is populated with the values that have already been mapped to the object.
14. Type a number in the Sequence field.
15. Select the Token Rule you created from the Rule list.
16. Select a Start Date.
17. Select an End Date.
18. Click Update. The token rule is mapped to the Knowledge Base Solution object.

### **6.2.3 Integrating with the Oracle Knowledge Management Basic Search (also known as Unified Search)**

Basic Search (also known as Unified Search) allows you to enter key words to perform a unified search for solutions across multiple repositories within the knowledge base. With this release of Oracle Knowledge Management, a Forum search has been added. In addition, the Solution Category search and the Solution search have been merged. Users performing a unified search will be able to search

both the Solution and Forums repositories. Searching the Solution repository will return results in both Solution and Solution Category.

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**Note:** The profile option Knowledge: Available Repository For Search determines which of the repositories defined in JTT are available to search. The default value for this option is SOLUTIONS, FORUMS.

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In order to fully leverage Oracle Knowledge Management's unified search functionality from an integrated application you will need to add a key/value pair through the System Administrator Console within the CRM Technology Foundation (JTT). For more information on adding properties or key/value pairs refer to the *Oracle Applications CRM System Administrator's Guide*.

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**Note:** The changes noted above are only applicable to the unified search functionality in Oracle. Unified Search is set up differently in Oracle iSupport. For information on setting up Oracle iSupport refer to the *Oracle iSupport Implementation Guide*.

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## Login

Navigate to the Oracle Applications login page at:

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

## Responsibility

CRM HTML Administration - System Administrator Console within the CRM Technology Foundation (JTT)

## Steps

1. Navigate to Settings > System > Properties > Advanced
2. From the View list, select the CS product code.
3. Click Create to add a new key. The Create Key page displays.

4. Type **service.oracle.apps.cs.knowledge.bean.SolutionCategorySearchFactory.categories** in the Key Name field
5. Edit the table.
  - a. Type **0** into the Sequence field.
  - b. Type **SOLUTIONS** into the Value field.

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# Diagnostics and Troubleshooting

## 7.1 Common Problems and Solutions

This chapter provides instructions on how to correct errors and provides workarounds for common problems that you may experience in configuring or administering Oracle Knowledge Management.

### **What are the factors that determine the solution search results in Oracle Knowledge Management?**

In Oracle 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 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.

### **Why can't I find a new solution using Advanced or Basic Search pages?**

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.**

Confirm that Oracle Text (formerly Oracle Intermedia text) has been set up correctly in your environment and whether the 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.

**What does the following error indicate: 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`

**My browser is javascript enabled yet some of my 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`

**Upon launching the Oracle Knowledge Management HTML user interface from the Service Request form I receive the following error: "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

### **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.

### **When I navigate to Oracle Knowledge Management from Oracle TeleService and try to do a Basic or an Advanced search I do not get search results.**

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't I edit a statement in a published solution that I am able to check out?**

Only a Knowledge 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 Administrators to prevent knowledge workers from changing the statements that are shared between other solutions.

### **As a member of a resource group assigned to all steps in an authoring flow, how can I 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 set up
- 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 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.

**In Oracle TeleService, 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 TeleService 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 not get results when I use Oracle 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.

**Where are the attachments to the solutions within Oracle Knowledge Management stored?**

Attachments to solutions in Oracle Knowledge Management are stored in the database through JTT attachments. For more information on JTT Attachments, see the latest version of *Oracle Common Application Components User's Guide*.

**When are solutions marked for re-indexing?**

Whenever 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.

**How do I delete a solution?**

Deleting solutions is not allowed in this release of Oracle Knowledge Management. You can perform a soft delete by creating an authoring flow to obsolete a solution.

**Can I end date a solution type?**

You can end date solution type. End dating a solution type will prevent any further solutions of this type from being created after the end date has expired. Solutions currently in progress will be allowed to complete. End dating does not delete the solution type from the database.

**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 Oracle 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 on the Advanced Search page be configured?**

Yes. The search methods on the 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 I reference image files in a 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.

**I have created a solution type but when I create a solution it does not appear on the solution type list?**

You must associate at least one statement type to your solution type. A solution type without an associated statement is incomplete and will not be available to select from the Solution Type list when a user creates a new solution.



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## Oracle Knowledge Management Seed Data

### A.1 User Role to Permission Mapping

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

## A.1.1 Knowledge Management Roles

An Oracle Knowledge 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 Oracle 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 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
CS_Assoc_Ext_Obj_To_Sol	Knowledge: Authoring: Permission to attach external objects to a solution	YES	YES	YES

**Table A-1 Knowledge Management Roles and Permissions**

<b>Permissions</b>	<b>Description</b>	<b>CS_ SYSTEM_ ADMIN</b>	<b>CS_ KNOWLEDGE_ WORKER</b>	<b>CS_ SUPPORT_ AGENT</b>
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
CS_Rec_Sol_ Update	Knowledge: Setup: Permission to update Recommended Solutions	YES	YES	

**Table A-1 Knowledge Management Roles and Permissions**

<b>Permissions</b>	<b>Description</b>	<b>CS_SYSTEM_ADMIN</b>	<b>CS_KNOWLEDGE_WORKER</b>	<b>CS_SUPPORT_AGENT</b>
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
CS_Workflow_Setup_Update	Knowledge: Setup: Permission to update solution authoring workflow setup	YES		

**Table A-1 Knowledge Management Roles and Permissions**

<b>Permissions</b>	<b>Description</b>	<b>CS_ SYSTEM _ADMIN</b>	<b>CS_ KNOWLEDGE _WORKER</b>	<b>CS_ SUPPORT _AGENT</b>
CS_Workflow_ 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

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## Profile Options

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

- Section B.1, "Before You Begin"
- Section B.2, "Overview of Setting Profile Options"
- Section B.3, "Setting Profile Options"
- Section B.4, "Oracle 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.

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**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.

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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 Knowledge Management Profile Options

The following table lists the Profile Options available in Oracle Knowledge Management in this release.

**Table B-1 Profile Options for Oracle Knowledge Management**

<b>User_Profile_Option_ Name</b>	<b>Description</b>	<b>Default Profile Value</b>
Knowledge: Action for Negative Solution Feedback	Determines what action to be taken for Solutions that are linked in a negative status	NA
Knowledge: Action for Positive Solution Feedback	Determines what action to be taken for Solutions that are linked in a positive status	NA
Knowledge: Available Repositories for Search	Sets the available repositories for the Basic Search to search across.	SOLUTIONS, FORUMS
Knowledge: Concurrent Search Mode for Unified Search	Sets Basic Search to search all repositories concurrently if set to Yes. Recommended that this profile is set to 'Yes'	Yes
Knowledge: Default Authoring Flow	Sets the default authoring flow to which solutions will be submitted.	No default value
Knowledge: Default Distribution Level	Sets the default statement visibility level for statement authoring	Internal
Knowledge: Default Product Category Set	Replaces the profile option Knowledge: Default Knowledge Base Product Category Set Determines the Product Category set used from Inventory.	Inv.Items
Knowledge: Default Search Relevancy	Filters search results below this score, applies to the simple and advanced search List of values includes 1, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100	1

**Table B-1 Profile Options for Oracle Knowledge Management**

<b>User_Profile_Option_Name</b>	<b>Description</b>	<b>Default Profile Value</b>
Knowledge: Default Searching Method	<p>Sets the default searching method in the simple and Advanced solution search.</p> <p>Searching methods include:</p> <p>Accumulate, All Keywords, Any Keywords, Intermedia, Fuzzy match, Reference Number, Theme</p> <p>Note: The Administrator should not use the value Reference Number as the default search method.</p>	Accumulate
Knowledge: Default Solution Type for Authoring	Sets the default solution type used in Solution authoring	Symptom Cause Action
Knowledge: Display Platform Attributes	Hides platform attributes across Oracle Knowledge Management. The platform attribute will be hidden from the search pages as well as detail pages.	Yes
Knowledge: Display QuickFind	Controls whether the Quick Find bar is displayed in Oracle Knowledge Management.	No
Knowledge: Display Search Option List	Controls whether the 'Using' search option is displayed or not on the Solution Advanced Search	No
Knowledge: Event handler class name for a calling application	<p>Replaces the profile option Knowledge: Event Handler class name for KM solved/unsolved actions predefined by other apps</p> <p>Same values and functions apply. The profile option has only been renamed.</p> <p>Used in the integrations with calling applications. Defines the event name between the solution and calling object. The default event will link the solution to the calling application object</p>	Oracle.Apps.CS.Knowledge.Bean.DefaultKMEventHandler
Knowledge: Expose Search Related Solutions Button	Controls whether the Search Related Statements button is displayed or not on the Advanced Solution Search.	No

**Table B-1 Profile Options for Oracle Knowledge Management**

<b>User_Profile_Option_Name</b>	<b>Description</b>	<b>Default Profile Value</b>
Knowledge: Maximum Number of Search Results	Replaces the profile option Knowledge: Knowledge Base Search: Maximum Number of Search Results.  Same values and functions apply. The profile option has only been renamed.  The maximum number of search results to display in search result	100
Knowledge: Select Authoring Flow	Controls whether user can select an authoring flow to submit the solution to during the solution authoring process.  If this value is set to No: User will not be able to pick a flow, and all submissions are sent to the default flow defined in profile option Knowledge: Default Authoring Flow	Yes
Knowledge: Statement Display Order on Solutions Details Page	Controls the display of statements by the order in which they were created or grouped by statement type	Position Order
Knowledge: User Responsibility when Calling KM from Another Application	Replaces the profile option Knowledge: Knowledge Base Responsibility when Called from Another Application  Same values and functions apply. The profile option has only been renamed.  The user responsibility when arriving at KM from calling application.	Knowledge Agent-Oracle Service

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# 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. At least 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.



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# 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 committing 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 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>12 World Cup>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>>New Category>>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>New Category>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>
```



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# Glossary

## **Action**

An Oracle's Knowledge Management (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.

## **Advanced Search**

Advanced Search is a more comprehensive search than Basic Search. You can search for solutions under different categories, products, and/or platforms. You can search one solution type or all, and search for statements. You can also select an existing statement in Knowledge Management and perform a related search.

## **All Keywords**

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

## **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 defines the steps or tasks that a solution has to follow in the solution approval or rejection process.

**Basic Search (Also known as a Unified Search)**

Basic search is a type of search that allows you to search for a solution, solution category, and forum message based on a keyword.

**Boolean**

In this searching method, you can enter your own Oracle Text operators. If you do not enter an operator, this search performs a phrase search.

**Category**

A folder containing a set of related solutions.

**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.

**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.

**End Date**

End dating a statement or solution type will prevent any further statements or solutions of this type from being created. Solutions or statements currently in progress will be allowed to complete.

End dating a solution or statement type does not mean that the solution or statement type has been deleted. Instead, it is considered a “soft” delete that can be revoked by removing the end date on the solution or statement type at any point in time

**Find Related Statements**

The search method that finds all other statements 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 searching method, 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.

**Knowledge Base**

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

**Knowledge Worker**

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

**Merchant**

A company that has purchased or is using one or more Oracle applications.

**Oracle Text**

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

Formerly known as Intermedia Text.

**Relationship**

A link between a solution to a statement or a statement to another statement that indicates 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 of which it is a part.

**Score**

Each solution is scored based on the text match performed by Oracle 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**

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

### **Solution Number**

Every solution in Oracle's 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 Oracle 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**

An attribute of a solution that helps define the type of content that goes into a solution (a solution type is like a template).

### **Statement**

A statement is a description of any aspect of a problem, its cause, or its resolution. It contains a summary field that can be a maximum of 500 characters and a detail field that can be maximum of 4 GB. Statements can be segmented into statement types.

**Note:** If the detail field is greater than 32KB, the detail field displays as read only and cannot be edited. Users need to use statement import/export to edit the statements that are bigger than 32k. Statement import only supports text file.

### **Statement Type**

Statements can be segmented 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 a solution or statement has gone through. Common solution statuses are: Draft, Under Edit, Technical Review, Editorial Review, Obsolete, and Published.

### **Symptom**

A 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 Oracle Text. Oracle Text 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.

**Unified Search**

Also known as a Basic Search. Please see Basic Search definition.

**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 system administrators, knowledge workers, and knowledge agents.



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