

Oracle® Knowledge Management

User Guide

Release 11*i*

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Oracle Knowledge Management User Guide, Release 11i

Part No. B12077-01

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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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Preface

Intended Audience

Welcome to Release 11*i* of Oracle's Knowledge Management.

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

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

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

- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

This document contains the information you need to understand and use Oracle's Knowledge Management.

- Chapter 1 provides an overview of Oracle's Knowledge Management, key features, integrations with other Oracle applications, process flows, what's new, and what's obsolete sections.
- Chapter 2 provides steps on how to access Oracle's Knowledge Management and a summary of tasks that can be done in the module.

- Chapter 3 covers the search functionality of Oracle’s Knowledge Management and includes information and steps on accessing the different search methods.
- Chapter 4 provides an overview of solutions and other tasks associated with solutions in the module.
- Chapter 5 provides an overview of solution types and the tasks associated with solution types in Oracle’s Knowledge Management.
- Chapter 6 provides an overview of statement types and the tasks associated with statement types in Oracle’s Knowledge Management.
- Chapter 7 provides an overview of categories and the tasks associated with categories in Oracle’s Knowledge Management.
- Chapter 8 provides information about authoring flows in Oracle’s Knowledge Management and the tasks associated with authoring flows.

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle's Knowledge Management (and any other Oracle Applications products). This guide also includes information on setting 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

Oracle's Knowledge Management Implementation Guide

This guide provides the implementation steps for implementing Oracle's Knowledge Management. It also covers the mandatory and optional dependencies for setting up Knowledge Management, Verifying the implementation, Integration of Oracle's Knowledge Management with Other Oracle Products, and Diagnostics and Troubleshooting.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 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

This guide provides instructions for 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.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains 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 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains 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

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

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle's 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's Knowledge Management.

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle's 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

Each eTechnical Reference Manual (eTRM) contains 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

This manual contains 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

This manual contains 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

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle's Knowledge Management working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: 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.

Introduction to Oracle Knowledge Management

This chapter discusses the key features and process flows of Oracle Knowledge Management. Sections in this chapter include:

- Section 1.1, "Overview of Oracle Knowledge Management"
- Section 1.2, "Oracle Knowledge Management Key Features"
- Section 1.3, "Oracle Knowledge Management Integrations"

1.1 Overview of Oracle Knowledge Management

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.

1.2 Oracle Knowledge Management Key Features

Oracle Knowledge Management includes the following features:

Integration With Other Oracle Applications

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

You can choose from multiple search methods available in Oracle Knowledge Management.

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 or solutions 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 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 Management 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.

User Defined Search Result Order

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

- Relevancy based on percent match. For example, only display solutions that match the query 90% or better
- Number of rows to be displayed per screen

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

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

Oracle iSupport uses Oracle Knowledge Management to search for published solutions. Oracle iSupport end users and service agents can search Knowledge Management for solutions. Oracle iSupport end users can also see frequently used solutions and solutions recommended by an Knowledge Management administrator, without waiting for a service agent's assistance.

Oracle TeleService

Oracle TeleService (Support module) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. It is an agent facing application used by a customer service representative/agent (CSR). Oracle TeleService provides an integrated solution for conducting all aspects of customer management and interaction. It provides call center agents with the tools and information required for effective customer relationship management. See the latest version of *Oracle TeleService User Guide* for more information.

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

- A CSR receives a customer call. The agent opens a service request by entering customer information and verifying service eligibility.
- The CSR notes the customer problem. While writing the problem description, he searches the knowledge base for similar information. If the same or similar problem exists, a solution may be available as well. Agents can access more solutions than customers.

- The CSR initiates a search in the knowledge base for an existing solution. If one is found, it is used. If not, he can create a new solution.

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

Oracle Knowledge Management allows a technician in Oracle Depot Repair to review the full problem solution life span, starting from the initial diagnosis of a problem to problem resolution.

Oracle eMail Center

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

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

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 the *Oracle iSupport User Guide* for more information.

Oracle Quality Online

Oracle Quality Online (OQO) is a comprehensive web-based application that can be used by organizations to track and manage product defects and enhancements. See the latest version of *Oracle Quality Online User Guide* for more information.

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.

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

Overview of Using Oracle Knowledge Management

This chapter provides an overview of accessing Oracle's Knowledge Management and a list of tasks that can be done in Oracle Knowledge Management. Sections in this chapter include:

- Section 2.1, "Accessing Oracle Knowledge Management"
- Section 2.2, "Summary of Oracle Knowledge Management Tasks"

2.1 Accessing Oracle Knowledge Management

Oracle Knowledge Management has both internal users and external users that can search for published solutions. Knowledge Management is used by several Oracle applications for searching and creating solutions. For example, Oracle iSupport end users can access Knowledge Management from the Support tab on the Oracle iSupport Homepage to search for published solutions.

Knowledge workers, customer service representatives, and Knowledge Management administrators can access Knowledge Management user interface directly to search for solutions and to create new solutions. Internal users have various levels of setup and other administrative permissions.

Roles determine screen-level permissions. A user can have one or more roles. Responsibilities determine the menus that a user views. Every user has to have at least one responsibility.

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

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

Table 2–1 Responsibilities, Menus, and Tabs for Internal Knowledge Management Users

Responsibilities	Menus	Tabs
CS_KB_KNOWLEDGE_WORKER	CS_KB_TOP_KW_MENU	Knowledge, Authoring
CS_KB_AGENT	CS_KB_TOP_AG_MENU	Knowledge, Authoring
CS_KB_SYS_ADMIN	CS_KB_TOP_MENU	Knowledge, Authoring, Setup

Prerequisites

None

Login

Use your HTML login, `jtflogin.jsp`, to log in to the Self Service Administration (Oracle iSupport Homepage).

Responsibility

None

Steps

For External User (Oracle iSupport Users)

Select the Support tab on Oracle iSupport Homepage. (For more information, see Oracle iSupport documentation)

For Internal Users

Navigate to Authoring.

2.2 Summary of Oracle Knowledge Management Tasks

Use Oracle Knowledge Management to perform the following types of tasks:

- Managing Search

- Managing Solutions
- Managing Solution Types
- Managing Statement Types
- Managing Solution Categories
- Managing Authoring Flows

Managing Search

This chapter includes information about the search functionality in Oracle Knowledge Management. Sections in this chapter include:

- Section 3.1, "Overview of Managing Search"
- Section 3.2, "Using Basic Search (also known as Unified Search)"
- Section 3.3, "Using Advanced Search"
- Section 3.4, "Viewing Solutions in Progress"
- Section 3.5, "Searching Solutions in Progress"
- Section 3.6, "Viewing Solution Detail Page"
- Section 3.7, "Searching for Statements"
- Section 3.8, "Viewing Statement Detail Page"
- Section 3.9, "Explaining Index Synchronization"
- Section 3.10, "Searching with Integrated Products"

3.1 Overview of Managing Search

The search in Knowledge Management is used for searching solutions in the knowledge base. It can be extended to search across different repositories such as Forums and Categories and can also be configured to allow users to search using different searching methods.

Knowledge Management has a basic search (also known as unified search) mode and an advanced search mode. The basic search performs text searches and its biggest advantage is that it has the capability to search across multiple repositories. Examples of repositories include Solutions, Forums, and Categories. Basic searching

is based on key words which use the Oracle Text search engine to execute searches. The advanced search is specific to solutions and its biggest advantage is that it can use statements to search and manipulate criteria. Both the basic and advanced searches retrieve only published solutions that have been indexed. Solutions in progress, drafts, or obsoleted solutions are not retrieved in the basic and advanced search results.

The Oracle Knowledge Management search is called from other service-related applications within the Oracle E-Business Suite. For example, service representatives might try resolving customer issues by searching Knowledge Management from the Oracle TeleService product, while customers might search for solutions through Oracle iSupport.

Solutions are not simply content, they are intended to be pieces of knowledge or knowledge articles that actually provide edification on how to resolve a particular issue. In its simplest form, a search can be a key word search.

Describing a Solution

In order to fully understand the searching process in Knowledge Management it is important to understand how solutions are added to the knowledge base. The scenario below provides an example of how a solution is added to the knowledge base.

Example 3-1 Solutions in the Knowledge Base Example

Company ABC manufactures and sells dishwashers. When customers have issues with their dishwashers they call the Company ABC service department for assistance. In certain cases, they may have to ship the dishwashers back to Company ABC for repair or schedule a field service representative to come and fix it. After the problem with the dishwasher is resolved, the service department creates a solution in the knowledge base. The knowledge worker in the company ensures the solution has been properly authored and publishes the solution. Once the solution is published within the knowledge base, the solution can be shared with other customers and service representatives. Customers can access the solution by conducting a search of the Company ABC knowledge base from a calling application such as Oracle iSupport. The knowledge base can also be shared with Company ABC suppliers or partners who may need to access it.

Describing Searching Functionality

Oracle Knowledge Management integrates with Oracle Text to provide complete and flexible search functionality. Knowledge Management users can search for solutions and statements using the following search methods:

Basic Search (also known as Unified 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 header, body, and number. 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.

Example 3–2 Basic Search (also known as Unified Search) Example

A customer of Bicycle Company ABC has logged on to Oracle iSupport to find out how he can remove a tire from his bike. The customer enters the key words, *remove tire*, into the text entry box in order to search the knowledge base. After selecting search, a list of results are presented in a summary table, the table is sorted with the documents of highest relevancy (score) to the search criteria at the top. Each row in the table displays a solution. The customer identifies a potential solution from the search results table called, *Removing a Tire*. He can view the solution details by clicking on the solution title.

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. The scenario below provides an example of how solution categories are used to search.

Example 3–3 Solution Categories Example

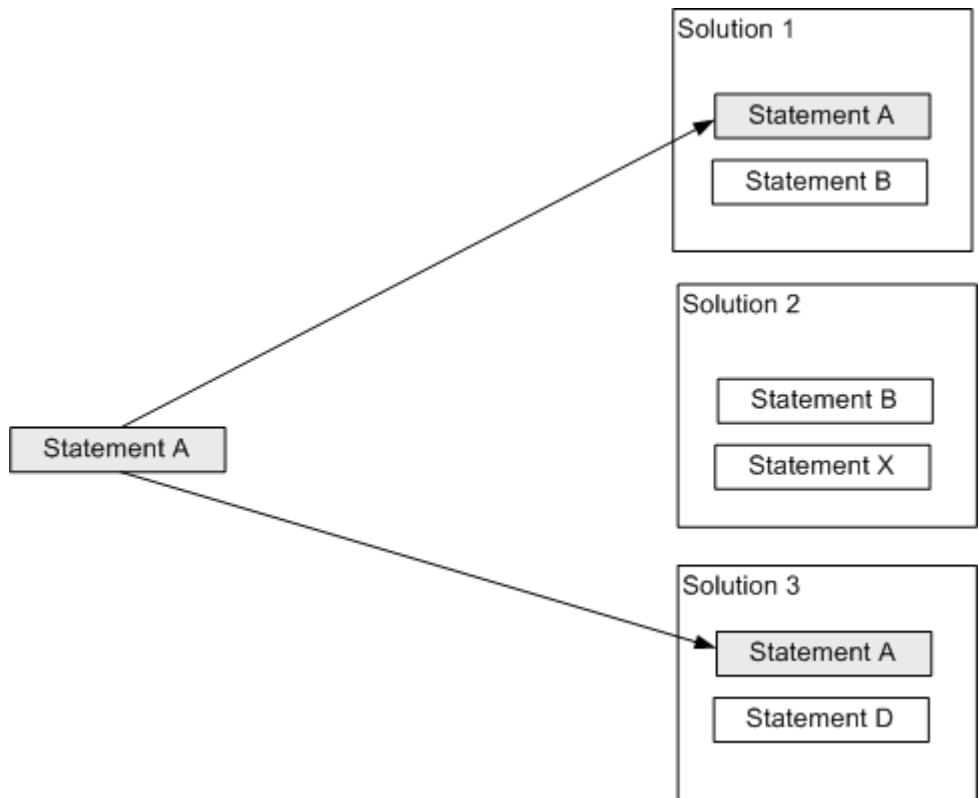
Bank ABC has set up Knowledge Management solution categories to allow teleservice representatives to easily navigate solutions, thereby replacing the need for its large employee procedure manual which is used to answer basic customer questions about the bank and its products. Solution categories for Bank ABC include Customer Address Procedures, Branch Locations and Hours, Checking Accounts, and Savings Accounts.

A customer calls the Bank ABC teleservice center and asks how late the San Jose branch is open. The Bank ABC teleservice representative navigates to the *Branch Locations and Hours* category. A list of subcategories appears. The teleservice representative then navigates into a subcategory called *Northern California Branches*. Within the *Northern California Branches* subcategory a list of results are presented in a summary table. Each row in the table shows a solution. The teleservice

representative identifies a potential solution from the search results table called, *San Jose Branch Details*. He can view the solution details by clicking on the solution title.

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. The figure below shows how Knowledge Management's advanced search identifies related statements and solutions in the knowledge base.

Figure 3–1 Related Statements and Solutions

Summary of Related Statements and Solutions Figure: Statements B and D are related to Statement A because they are part of solutions that also contain Statement A. Statement X is not related to Statement A because it is not part of a solution that contains Statement A. Solutions 1 and 3 are related to Statement A because they each contain Statement A. Solution 2 is not related to Statement A because it does not contain Statement A.

The example below provides an example of how the advanced search is used to search.

Example 3–4 Advanced Search Example

Electronics Manufacturer ABC has discovered one of the components it manufactures, the ABC Hard Drive, is defective. There are currently several solutions in the knowledge base relating to the ABC Hard Drive. In order to ensure that the knowledge base contains meaningful information, knowledge workers search for statements that contain information about or related to the ABC Hard

Drive. In addition, knowledge workers search for solutions related to these statements. The knowledge worker identifies all solutions from the search results table that relate to the ABC Hard Drive and updates the solutions and statements accordingly.

Statement Search

Statement Search allows you to search for specific statements and find their related solutions.

Solutions in Progress

Solutions in Progress (formerly known as Work Pending in prior versions of 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. 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.

Sorting Search Results

Search results within Oracle Knowledge Management are presented in a summary table and can be sorted by column. Sort data into ascending or descending order by clicking on a column heading. A blue arrow appears next to the column used to sort the search results. An up arrow indicates an ascending sort and a down arrow indicates a descending sort.

Access to Solutions and Statements

When a solution or statement is created, it is assigned a distribution level attribute by the author. This attribute along with user access levels, makes it possible to control which solutions and statements a particular user can access during a search. This allows companies to add information to the knowledge base that may be critical in helping employees do their jobs, but may not be appropriate for customers.

Distribution levels include:

- **Restricted Distribution (highest security):** A solution can only be viewed by users with restricted permissions assigned.
- **Internal Distribution:** A solution can be viewed by users with internal or restricted permissions assigned. This distribution level identifies solutions that can be viewed by internal users within a company.

- **Limited Distribution:** This distribution level has the same effect as internal distribution. Limited distribution is a way for companies to identify solutions that can be distributed manually to external customers through a mechanism like e-mail.
- **External Distribution (lowest security):** A solution can be viewed by users with external, internal or restricted permission assigned. This distribution level identifies solutions that can be viewed by internal users within a company and to external customers.

Although there are four distribution levels in effect there are only three as Internal and Limited are the same, but are a way for companies to further distinguish the solutions that are intended for internal audiences.

Most solutions and statements in the knowledge base are typically created for external distribution.

Example 3–5 Distribution Levels Example

Company ABC has created a business process that directs customer service representatives to notify the sales department by e-mail when customers call regarding a particular software solution in the knowledge base. The purpose of this notification is to provide Company ABC sales representatives with leads for their training organization.

Company ABC would like to add a statement to the solution reminding customer service representatives to follow this process but wants this interaction to be invisible to the customer. Company ABC also wants its customers to know the telephone number for its training organization at the time they access the solution.

- A knowledge worker at Company ABC creates a statement with an internal distribution that states, Forward customer name and solution number to sales@companyabc.com.
- A knowledge worker at Company ABC creates a statement with an external distribution that states, Training is available by calling Company ABC University at 800.555.4321.

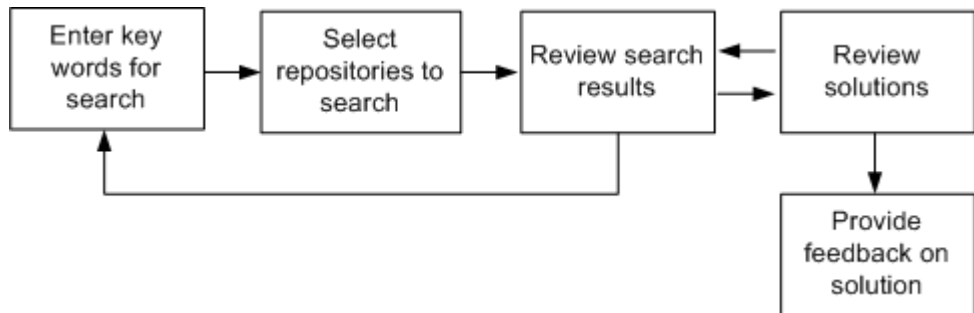
Customers accessing the knowledge base from a calling applications such as iSupport will see the telephone number statement as it is flagged for external distribution, but will not see the request to notify the Company ABC Sales department as it is flagged for internal distribution.

3.2 Using Basic Search (also known as Unified 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. Because this search is useful for key word searching it is used by all types of users. The basic search will match the words you enter across the header and body of the solution.

The diagram below illustrates the process flow for a basic solution search by showing the steps from entering the search criteria to providing feedback on a solution.

Figure 3–2 Basic Solution Search Process Diagram



Use this procedure to conduct a basic search:

Login

Navigate to the Oracle Applications login page at:

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

Prerequisites

None

Responsibility

CS_KB_KNOWLEDGE_WORKER

CS_KB_AGENT

CS_KB_SYS_ADMIN

Steps

1. Navigate to Knowledge tab > Knowledge
2. Choose a repository from the Search list.
Perform a Unified Search by choosing All. This will search across all available repositories.
3. In the Search text field, type known information to narrow down your search.
For example, to search for a solution regarding a printer type the word *printer*
4. Select Go.
Results appear in the Search Results section and are organized by repository into tables. When searching all repositories, results are organized into three tables:
 - Solutions
 - Solution Categories
 - Forums

Basic Search Results

The Basic Search results are presented into summary tables that contain the following information:

Solutions

Search results for the Solutions repository are presented in a summary table and include the following:

- Score: Shows how closely the results match the query key words entered.
- Title: Indicates the solution title. Users can click on the title to drill down to the solution details.
- Number: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.
- Last Updated: Shows the last date on which the solution was updated

Click the corresponding solution title to display the Solution Detail page.

Solution Category

Search results for the Solution Category repository are presented in a summary table and include the following:

- Score: Shows how closely the results match the query key words entered.
- Title: Shows category title and hierarchy.

Click the corresponding title to display solutions listed within the solution category.

Forums

Search results for the Forums repository are presented in a summary table and include the following:

- Score: Shows how closely the results match the query key words entered.
- Title: Indicates the forum title
- Last Updated: Shows the last date on which the forum was updated

Click the corresponding Forum to display the Message Content page.

3.2.1 Browsing Solution Categories

Solution Categories are used to organize solutions into logical groupings or subject areas. Using the analogy of a library, fiction could be characterized as a category, mysteries and classics could be characterized as subcategories, and book titles could be compared to solutions.

Oracle Knowledge Management allows you to navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base in order to find published solutions. When viewing solution details, the user can see the categories to which the solution belongs.

The diagram below illustrates the process flow for browsing solutions by showing the steps from reviewing solution categories to providing feedback on the solution.

Figure 3–3 Browse Solution Categories Process Diagram

Use this procedure to browse solution categories:

Login

Navigate to the Oracle Applications login page at:

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

Prerequisites

None

Responsibility

CS_KB_KNOWLEDGE_WORKER

CS_KB_AGENT

CS_KB_SYS_ADMIN

Steps

1. Navigate to Knowledge tab > Knowledge
2. Choose a Solution Category such as Appliances. The Solution Category page displays.
3. Choose a Solution Category (a sub-category) or a Solution.

Solutions appear in the Solutions section beneath the Solution Category section. Filter solutions by when they were last by choosing a time frame value from the View list.

Note: You can also perform a keyword search by entering a keyword in the Search Solution field. You can specify whether the search should be performed across All Solution Categories or Only in the Current Category displayed by selecting the corresponding radio button.

Solution Results within a Category

The Solution results displayed within a Category are presented in a summary table and include the following:

- **Title:** Indicates the solution summary. Users can click on the title to drill down to the solution details.
- **Number:** Indicates the solution number. It is alphanumeric and is a unique reference for the solution.
- **Last Updated:** Shows the last date on which the solution was updated

Click the corresponding title to display the Solution Detail page.

3.3 Using Advanced Search

Advanced Search searches solutions in the knowledge base, allowing you to find solutions using statements as criteria. In addition, you can specify attributes of the solution such as products and categories as well as which statement types to retain in the search. Being able to specify statements as criteria means that you can use existing statements to find a solution.

The summary below provides an overview of the search criteria that can be used in an advanced search.

Conditions

Searching Method

The Searching Method displays only if the Knowledge: Display Search Option List option is set to Yes. The default value is No.

See Appendix B for more information on the Display Search Option List.

Solution Type

Solution types help organize solutions within the knowledge base. The default solution type is symptom/cause/action (SCA) which, means the solution contains a symptom statement, a cause statement, and an action statement.

Choosing a solution type will return only statements of this type.

Filter Types

Adding a filter to the search criteria, will limit the result set. When a solution is created the author can assign the solution to solution categories, product types, and/or platforms. These groupings can be used as filters during an Advanced Search.

Examples of Filters:

- Solution Category: Hardware
- Product Type: Envoy Laptop
- Platform: Linux

Platforms are typically only used by high tech companies. The platform attribute can be hidden throughout the knowledge base by setting the Knowledge: Display Platform Attributes profile option to No.

Selecting a filter will return solutions that are associated to these categories, products, and platforms. Multiple filters can be used during an advanced search.

Statements

Statements are the basis of the advanced search.

Matching Statements

This is a text based search that searches the titles and descriptions of existing statements in the database to try and find similar statements.

Related Statements

A related statement search tries to find other statements that have been used in a solution containing a selected statement. You can execute a Related Statement search only if you have selected at least one matching statement.

Search Options

Search Solutions

This is a text based search. Search Solutions searches both solutions containing keywords in the statement section, and the solutions related to any statements selected in the statement section.

In simple terms, Search Solutions finds all solutions that match the search criteria. By default this search is used most of the time.

Search Related Solutions

This search is based on the links that the selected statements have to solutions. Any solution that has a relationship with any of the selected statements will appear in the search results. Relationships are created between a statement and a solution when a statement is used in the solution. The score reflects the number of selected statements that are contained in each solution search result. Solutions having most of the selected statements will have higher scores.

In simple terms, Search Related Solutions finds all solutions that contain the solutions specified.

Search Related Solutions appears only if the Knowledge: Expose Search Related Solutions Button option is set to Yes. The default setting is No.

Use this procedure to conduct an advanced search:

Login

Navigate to the Oracle Applications login page at:

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

Prerequisites

None

Responsibility

CS_KB_KNOWLEDGE_WORKER

CS_KB_AGENT

CS_KB_SYS_ADMIN

Steps

1. Navigate to Knowledge tab > Knowledge
2. Click Advanced Search. Solution Advanced Search page displays.
3. Under Conditions, choose a Solution Type from the list.
4. Add filters:
 - To add a solution category filter, choose a Solution Category from the list.
 - Click Add. The Select Solution Categories page appears.
 - Check the corresponding Select checkbox(es) to add solutions categories as appropriate.
 - Select Update to add the filter. The solution categories are added to the search criteria.
 - To add a product filter, select Product from the list.
 - Click Add. The Select Product page appears.
 - Check the corresponding Select checkbox(es) to add products as appropriate.
 - Select Update to add the filter. The products are added to the search criteria.
 - To add a platform filter, select Platform from the list.
 - Click Add. The Select Platform page appears.
 - Check the corresponding Select checkbox(es) to add platforms as appropriate.
 - Select Update to add the filter. The platforms are added to the search criteria.
5. Add a matching statement:
 - Choose a statement type from the Type list.
 - Type a keyword or statement in the Summary field.
 - Click Match Statement. The Search and Select: Matching Statements page displays.
 - Select the radio button corresponding to the matching statement.
 - Click Select. The statement is added to the search criteria.

Note: You can also refine your statement search on this page by choosing a new statement type, entering a modified summary, and clicking Go.

6. Add a related statement.
 - After adding a matching statement, click Search Related Statements. The Select Related Statements page displays.
 - Select checkboxes that correspond to the related statements.
 - Click Select. The statements are added to the search criteria.
7. Click Search Solutions. Results appear in the Results: Solution section on the Solution Advanced Search page.
8. Alternatively, click Search Related Solutions to search for solutions that contain the selected statements.

Advanced Search Results

The Advanced Search results are presented in a summary table and include the following:

- **Score:** Shows how closely the results match the query
- **Summary:** Indicates a summary of the solution. An expanded list of statements that are included in the solution can be displayed by selecting the plus icon next to the solution summary.

Search results can be added to the search criteria, by selecting the corresponding Select box and clicking Add to Search Criteria.

- **Usage:** Indicates how many times the solution has been viewed.
- **Last Updated:** Shows the last date on which the solution or statement was updated
- **View:** Allows you to view the Solution Detail page

Note: You cannot sort the Usage or View columns.

3.4 Viewing Solutions in Progress

Solutions in Progress or draft solutions 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.

When you navigate to the Solutions in Progress page the default view shows the solutions on which you are currently working. The Solutions in Progress page has three views and you can also search the Solutions in Progress using search criteria.

- Solutions I'm currently working on: Includes the solutions that you have created but not submitted for approval, or solutions that you have checked out for review but not submitted for approval.
- Solutions in progress that I can check out for editing: Includes the solutions that are pending approval that you can check out.
- All solutions in progress: Includes all solutions that are under edit by some users, or pending approval.

Use this procedure to search for solutions in progress in Oracle Knowledge Management.

Login

Navigate to the Oracle Applications login page at:

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

Prerequisites

None

Responsibility

CS_KB_KNOWLEDGE_WORKER

CS_KB_AGENT

CS_KB_SYS_ADMIN

Steps

1. Navigate to the Authoring tab > Solutions in Progress.

The Solutions in Progress page with all the solutions that you are working on appears. These are solutions that you have saved but have not submitted for approval.

2. Change the view by choosing a value from the View list.
3. Select Go. The new results display.

3.5 Searching Solutions in Progress

You can filter Solutions in Progress by using the Search Solutions in Progress page.

Login

Navigate to the Oracle Applications login page at:

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

Prerequisites

None

Responsibility

CS_KB_KNOWLEDGE_WORKER

CS_KB_AGENT

CS_KB_SYS_ADMIN

Steps

1. Navigate to the Authoring tab > Solutions in Progress.
2. Click Search at the bottom of the page. The Search Solutions in Progress page displays.
3. Enter Filter criteria. You can use any of the following filter criteria below to narrow your search of the solutions in progress.
 - Solution check out condition: Includes all solutions, solutions that are not checked out, and solutions that are checked out by a specific user.
 - Search within solutions I can review: Includes only solutions that you can check out.
 - Solution Number: Searches for solution number entered by user.
 - Solution Type: Filters by solution types.

- Solution Title: Searches solution titles for key words.
 - Solution Status: Filters by solution status.
 - Created between range: Searches for solutions created within a specified time frame.
 - Updated between range: Searches for solutions updated within a specified time frame.
4. Click Search. Results are displayed in the Search Results section of the page.

Reviewing Solutions in Progress Results

Solutions in Progress results are presented in a summary table and include the following:

- Solution Number: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.
- Solution Title: Indicates the solution title or solution summary. Users can click on the title to drill down to the solution details.
- Solution Type: Indicates the solution type.
- Solution Status: Indicates where the solution is in the approval cycle.
- Checked out by: Indicates the user that currently has checked out the solution.
- Created by: Lists the solution author.
- Last Updated: Shows the last date on which the solution or statement was updated.

Click the corresponding solution title to display the Solution Detail page.

3.6 Viewing Solution Detail Page

Whenever a knowledge solution is viewed within Knowledge Management or called by an application, for example, TeleService or Depot Repair, the presentation and format of the information is presented in the Solution Detail page.

The Solution Detail page identifies important information about the solution including what the solution is about (statements), the type of solution, and its authoring history. There is also information showing how the solution is applicable to specific products, categories, and platforms as well as details showing the external links (i.e. Service Requests, Repair Orders, etc.) and attachments.

There are also task group templates that may have been activated with a solution. Solution detail may include these tasks which are a description of how to action a solution. An example of a task is *schedule a field service representative*.

Information identifying the solution and its history are listed in a header. The header includes:

- Number: Indicates the solution number. It is alphanumeric.
- Type: Indicates the solution type.
- Distribution: Indicates who can access the solution.
- Author: Indicates user who created solution.
- Status: Indicates where the solution is in the approval cycle.
- Last Updated: Indicates when the solution was last updated.
- Last Updated By: Indicates by whom the solution was last updated.
- Title: Indicates the solution title or solution summary.

The elements that comprise the solution include:

- Solution Categories
- Products
- Platforms
- Statements

Note: The most critical information in the solution is the statements.

- Attachments
- Related Documents

These elements are described in detail in "Creating a Solution".

Users can submit comments that can be reviewed and added to the solution. In addition, users can indicate whether a solution *Can solve your problem?* Responses are captured in usage counts within Knowledge Management.

3.7 Searching for Statements

A solution is comprised of a series of statements. For example, the default solution type, symptom/cause/action (SCA), is comprised of three mandatory statements: a symptom statement, a cause statement, and an action statement. By searching for a statement you can find the related solutions containing that statement.

This process is typically only utilized by knowledge workers and administrators and is a useful way to find statements using statement numbers. The 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.

Use this procedure to search for statements.

Login

Navigate to the Oracle Applications login page at:

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

Prerequisites

None

Responsibility

CS_KB_KNOWLEDGE_WORKER

CS_KB_AGENT

CS_KB_SYS_ADMIN

Steps

1. Navigate to Knowledge tab > Statements. The Search Statements page appears.
2. In the Search Statements page, type some known information to narrow your search:
 - Statement Number: Indicates the number assigned to a statement in Oracle Knowledge Management when a statement is created.
 - Statement Type: Indicates the category assigned to a statement when a statement is created.

- Summary: Indicates a word or a sentence used in the summary of the statement.
 - Sort By: Indicates the sorting options, Last Updated Date, Statement Number, or Score.
3. Select Go.
- Results appear on the Search Statement Results page. To view related solutions scroll down to the Related Solutions section.
- Search results for the statement search cannot be sorted.

Statement Search Results

The Statement Search results are presented in a summary table and include the following:

- Score: Shows how closely the results match the query
- Statement Number: Indicates the statement number
- Statement Type: Indicates the statement type
- Summary: Indicates a summary of the statement

Click the corresponding statement number to display the Statement Detail page. Statement search results are not sortable.

3.8 Viewing Statement Detail Page

The Statement Detail page provides information about a statement, its history, and lists the solutions utilizing the statement.

Information identifying the statement and its history are listed in a header. The header includes:

- Number: Indicates statement number.
- Type: Indicates statement type
- Distribution: Indicates who can access the statement.
- Status: Indicates whether the statement is a draft or published.
- Created On: indicates when the statement was created.

The detail page also includes a Summary section that provides a summary of the statement, a Detail section which, indicates the content type (i.e. html) as well as

any additional descriptions of the statement, and a Related Solutions section that lists the solutions utilizing the statement.

Note: Knowledge administrators can perform global updates from this page by clicking Update.

3.9 Explaining Index Synchronization

Searching solutions is based on Oracle Text. When a search is conducted in Oracle Knowledge Management, a search for keywords is performed against an index of all of the solutions that have been added to the index.

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.

3.10 Searching with Integrated Products

Several products within the Oracle E-Business Suite integrate with Oracle Knowledge Management, allowing users to search the knowledge base from calling applications. The table below lists E-Business products with Knowledge Management search integrations:

Table 3–1 Oracle Knowledge Management Search Integrations

E-Business Suite Product	Search Integrations
Oracle iSupport	iSupport users can access Knowledge Management pages from the Support tab in iSupport. For information on using iSupport see the latest version of the <i>Oracle iSupport User Guide</i> .

Table 3–1 Oracle Knowledge Management Search Integrations

E-Business Suite Product	Search Integrations
Oracle TeleService	<p>TeleService users access Knowledge Management through the Service Request function in TeleService.</p> <p>For information on using TeleService see the latest version of the <i>Oracle TeleService User Guide</i>.</p>
Oracle Depot Repair	<p>Depot Repair users can access Knowledge Management through the Repair Orders function in Depot Repair.</p> <p>For information on using Depot Repair see the latest version of the <i>Oracle Depot Repair User Guide</i>.</p>
Oracle eMail Center	<p>eMail Center users access Knowledge Management data from eMail Center.</p> <p>For information on using eMail Center see the latest version of the <i>Oracle eMail center User Guide</i></p>
Oracle Partners Online	<p>Partners Online users access iSupport pages.</p> <p>For information on using Partners Online or iSupport see the latest versions of the <i>Oracle Partners Online User Guide</i> and the <i>Oracle iSupport User Guide</i>.</p>

Managing Solutions

This chapter includes an overview of solutions and the tasks associated with solutions in Knowledge Management. The sections in this chapter include:

- Section 4.1, "Overview of Solutions"
- Section 4.2, "Creating a Solution"
- Section 4.3, "Adding Comments to a Solution"
- Section 4.4, "Setting Up Solution Authoring Profile"
- Section 4.5, "Approving a Solution"
- Section 4.6, "Setting Up Recommended Solutions"
- Section 4.7, "Setting Up Definitions for Frequently Used Solutions"
- Section 4.8, "Setting Up Note Token Rules (also known as AutoLinks)"

4.1 Overview of Solutions

Describing Solutions

Solutions are a collection of statements and other data which, when organized together, provide users with valuable knowledge that can be used in solving product- and service-related issues. Statements can either be unique to a solution or can be shared with other solutions.

Example 4–1 Solution Example

An electronics manufacturer creates a solution entitled: *My Monitor is not Working*. This solution is made up of three statements designed to help resolve issues with a

monitor: 1) Statement: Monitor screen is blank. 2) Statement: Monitor is not plugged into computer. 3) Statement: Plug monitor into computer and reboot.

Expanding on this example further, these statements can be distinguished using statement types which helps to describe or classify statements. For example, 1) Monitor is blank, is a symptom statement. 2) Monitor is not plugged into computer, is a cause statement. 3) Plug monitor into computer, is an Action statement.

Other Solution Information

In addition to statements, solutions may contain additional information to help users identify and organize knowledge including:

Solution Type

Solutions are categorized into solution types, which help organize solutions within the knowledge base. Depending on the solution type, they are comprised of one or more mandatory statements and can include optional statements. For example, the default solution type, symptom/cause/action (SCA), is comprised of three mandatory statements: a symptom statement, a cause statement, and an action statement.

Distribution Level

When a solution or statement is created, it is assigned a distribution level attribute by the author. This attribute along with user access levels, makes it possible to control which solutions and statements a particular user can access during a search. This allows companies to add information to the knowledge base that may be critical in helping employees do their jobs, but may not be appropriate for customers.

Distribution levels include:

- **Restricted Distribution (highest security):** A solution can only be viewed by users with restricted permissions assigned.
- **Internal Distribution:** A solution can be viewed by users with internal or restricted permissions assigned. This distribution level identifies solutions that can be viewed by internal users within a company.
- **Limited Distribution:** This distribution level has the same effect as internal distribution. Limited distribution is a way for companies to identify solutions that can be distributed manually to external customers through a mechanism like e-mail.

- **External Distribution (lowest security):** A solution can be viewed by users with external, internal or restricted permission assigned. This distribution level identifies solutions that can be viewed by internal users within a company and to external customers.

Although there are four distribution levels in effect there are only three as Internal and Limited are the same, but are a way for companies to further distinguish the solutions that are intended for internal audiences.

Most solutions and statements in the knowledge base are typically created for external distribution.

Solution Title

A solution title is used to help users identify a solution in the knowledge base.

Solution Categories

Solution Categories are used to organize solutions into logical groupings. Using the analogy of a library, fiction could be characterized as a category, mysteries and classics could be characterized as subcategories, and book titles could be compared to solutions.

Products

Products are used to help identify which products may be impacted by a solution. For example, for the monitor example above it might be helpful to add all monitors the company sells to the solution.

Platforms

Platforms are used to help identify which platforms may be impacted by a solution.

Platforms are typically only used by high tech companies. The platform attribute can be hidden throughout the knowledge base by setting the Knowledge: Display Platform Attributes profile option to No.

Attachments

Attachments are used to supply additional documentation that may be helpful to the solution. An example of an attachment is a word document such as a white paper on a related topic.

Related Documents

Related documents allows external links and task templates that have been added to a solution.

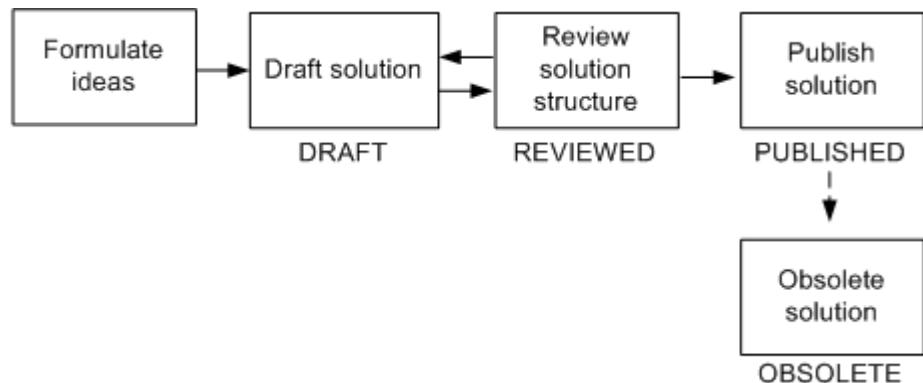
- External links: Indicate additional items in the database that are related to the solution, such as a service request or a repair order. It is useful to understand what other objects in the database have been associated with the solution.
- Task templates: Enable knowledge administrators to attach a task to a solution. These tasks help automate the service process. While solutions help describe how to fix a problem, tasks provide actions to actually fix the problem. An example of a task is, *Schedule an engineer to repair problem.*

Describing the Solution Lifecycle and Usage Counts

Solution Lifecycle

Solutions and statements have a status attribute that describes the phase of review that the solution or statement has gone through. Common solution statuses are: Draft, Under Edit, Technical Review, Editorial Review, Obsolete, and Published. The following diagram shows the solution lifecycle from when an idea for a solution is formulated, through editing and publishing, and ultimately to when it is no longer relevant and is made obsolete.

Figure 4–1 Solution Lifecycle Process Diagram



The status of a solution is used in the authoring flow process. Each status is associated with a step in an authoring flow and only users that are members of a user group that is assigned to that authoring flow and that step can modify the solution. When a user reviews a solution, he can select the next step in the flow,

bypass several steps if he is a member of multiple steps resource group, or reject the solution back to any of the previous steps.

A statement can either be in the draft status or published status. When a solution is in a draft status any newly created statements are also in a draft status. When a solution is published the draft statements are also published. Statements in a published status can be reused in other statements.

Understanding Solution Usage Count

The solution usage count describes how many times a solution has been used. In Oracle Knowledge Management the solution usage count is updated depending on the number of times a solution is used to solve a problem. In the applications that integrate with Oracle Knowledge Management, for example, Oracle iSupport, the question, *Can this solution solve your problem*, appears in the UI flow. If a user selects Yes, then the Knowledge Management Update Solution Used Count concurrent program updates the used counts in Oracle Knowledge Management based on a time schedule setup by an administrator. For example, if the schedule is every eight hours, then, the usage count will also be updated every eight hours.

4.2 Creating a Solution

Knowledge workers author and create solutions in the knowledge base. As solutions are a response to a problem, it is critical to ensure that the statements included in the solution are correct.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_AGENT
- CS_KB_SYS_ADMIN

Prerequisites

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

Steps

1. Navigate to Authoring > Create Solution. The Create Solution page opens.
2. Choose a Solution Type from the list.
3. Make a selection for the Distribution field. The options are Internal, Limited, Restricted, or External. You can view one or more of these values depending on your access level.
4. Type a solution title. The maximum length of a solution title is 500 characters.
5. You can optionally select one or more categories, products, and/or platforms to be associated with this solution. To add a category, product, or platform, select Add. The corresponding page appears. Make the required selection.

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

Creating a Statement

6. Select Create Statement to navigate to the Statement Detail page. In order to search for related statements you will need to have already selected a statement.
 - a. On the Statement Detail page, select a Statement Type

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

- b. Choose a Distribution option. The options are External, Internal, Restricted, and Limited. One or more of these values appear depending on your access level.
 - c. Type a summary for the statement. (Maximum limit is 500 characters).
 - d. Choose a Content Type. The options are: Text, Text with AutoLinks, HTML, and HTML with AutoLinks. The content type is only for the statement detail field.

- e. Type information about the statement in the Detail field. (Maximum limit is 4 GB).
- f. Optionally, you can also import or export a statement from or to a local text file by selecting Import or Export.
 - Import will allow you to import a text file from your computer into the Detail field.
 - Export will allow you to export text from the Detail field if you would like to edit using an external editor.
- g. Select Create.

Knowledge Management automatically searches the knowledge base for matching statements in order to prevent duplicate statements from being added to the knowledge base.

- If you would like to add an existing statement, choose a matching statement and click Select. The statement is added to the solution.
- Alternatively, if you do not see a matching statement you can add the statement you have created by clicking Continue. The statement is added to the solution.

When a new statement is created it will have a Draft status. Once the solution has gone through the approval process the statement will be assigned a statement number and show as published.

- 7. If you have added a published statement, you can search for related statements by clicking Search Related Statements on the Create Solution page. The Search Related Statements page appears.
 - a. Select the related statement you would like to add. You can add more than one related statement.
 - b. Click Select.
- 8. To add an attachment, select Add. The Attachment window appears. Select a file from your computer and select Attach.
- 9. Optionally, you can also add external links (Task Template Groups, Service Request, Depot Repair) to the solution by choosing an option and selecting Add. A corresponding page appears. Make your selection
- 10. Either select Save or select Save and Submit.

- a. If you select Save, the Create Solution page refreshes with a confirmation message at the top of the page indicating the solution has been saved, You can update this solution.
- b. If the Knowledge: Select Authoring Flow option is set to Yes (default value):

If you select Save and Submit and you have setup authoring flows, then the Submit Solution: Select Authoring Flow page appears. There is a confirmation that solution has been created. Choose an authoring flow and select Apply.

If the Knowledge: Select Authoring Flow option is set to No:

If you select Save and Submit, the Solution Detail page appears with a confirmation message indicating the solution has been submitted.

Note: The Oracle Workflow engine determines the user group that is associated with a particular status of the solution. An E-mail or notification about the solution being ready for a review is sent to all members of that user group who have subscribed to a product or a category in the Solution Authoring Profile page. The solution has to be related to the subscribed category/product.

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

4.3 Adding Comments to a Solution

You can add comments to a solution from the Solution Detail page. Comments are a communication tool for knowledge workers during the solution authoring process and are intended to help reviewers provide feedback on a solution during the review process.

All added comments have a draft status and an internal distribution option. Comments attached to a solution can only be viewed by Knowledge Management users.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_AGENT
- CS_KB_SYS_ADMIN

Prerequisites

Internal Knowledge Management users with permissions to add comments (CS_Solution_Comments_Add) can add and view comments to a solution.

Steps

1. Navigate to Authoring > Solutions in Progress. The Solutions in Progress page with *Solutions I'm currently working on* appears.
2. Select the solution title of the appropriate solution to navigate to the Solution Detail page to view details about the selected solution in progress.
3. Select Create Comment. The Create Comment page appears with the Solution Number, Author, and Creation Date.
4. Type the comment summary.
5. Type the comment detail.
6. Select Save
7. The Solution Detail page appears. The comment is added with a status of Not Reviewed. Once the comment is reviewed the status will be updated to Reviewed.

For information on viewing solution detail please refer to "Viewing Solution Detail Page".

4.4 Setting Up Solution Authoring Profile

Authoring flows define the steps that a solution goes through in the solution authoring flow process. After creating a solution and submitting it to an authoring flow, a Knowledge Management administrator, knowledge worker, or a customer service representative, in the assigned user group associated to the step that the solution is in, can approve or reject a solution to the next or previous step of the authoring flow.

Members of a user group can set up their own profile, i.e, select one or more products and/or categories in the Solution Authoring Profile page to receive a

notification that a solution related to that product and/or category is ready for review. Members who do not subscribe to any product or category will not receive a notification but can search for all solutions in progress from the Solutions in Progress page. Refer to the *Oracle Workflow Guide* on how to set up and monitor a workflow

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

Prerequisites

None

Steps

1. Navigate to the Oracle Applications login page at:

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

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

2. Type your user name and password.
3. Select Profile > Solution Authoring Profile. The Solution Authoring Profile page appears.
4. In the Categories sub-section, select Add. The Select Solution Categories page appears.
 - Check the check-box corresponding to the solution category that you want to select. Select Update.
5. In the Products sub-section, select Add.
 - Choose a product from the list or search for the product.
6. Select Update. The Solution Authoring Profile is updated.

4.5 Approving a Solution

After creating a solution and submitting it to an authoring flow, a Knowledge Management internal user in the assigned user group at each step can either approve the solution to the next step with or without modifications, or reject the solution to any of the previous steps of the flow. Members of a user group assigned to the next step or previous step will receive a notification that a solution is ready for review.

All new and edited solutions must be approved for publication. When a solution in an authoring flow is submitted to the step that has the publish action, then the solution is published. Once the solution is published it will need to be synched with the index to appear in the search process. For information on index synchronization for new and edited solutions, please refer to "Explaining Index Synchronization"

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_AGENT
- CS_KB_SYS_ADMIN

Prerequisites

To publish, or reject a solution to the next step or any previous step in an authoring flow, you have to be a member of the solution's user group to whom that step is assigned.

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

Steps

1. Navigate to Authoring > Solutions in Progress. The Solutions in Progress page with all the solutions that a user is working on appears.
2. Select Solutions in progress that I can check out for editing from the View list and click Go.
3. Select the title to navigate to the Solution Detail page for that solution.

4. Select Check Out and modify the solution.
5. The Solution Detail page appears. Make the required edits.

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

6. Select Save and Submit. The Resubmit Solution page appears prompting you to select the next status in the authoring flow. The page displays the current status and indicates the authoring flow to which the solution was submitted. The status options will depend on the authoring flow. Examples of authoring flow status include:
 - Author
 - Technical Review
 - Editorial Review
 - Published

Select the radio button corresponding to the status to which you would like to submit the solution. Click Apply. You will see a confirmation that the solution has been updated.

4.6 Setting Up Recommended Solutions

Recommended Solutions is a list of solutions that knowledge workers recommend for users to review. Users accessing iSupport can view a list of Recommended Solutions that is set up within Knowledge Management. In order for this list to be effective it should be actively managed. Knowledge Management Administrators may want to base this list on solution usage counts as well as other information captured by service representatives.

Example 4-2 Recommended Solutions

A television manufacturer has determined that 80% of its service inquiries over the Web and telephone can be solved with ten solutions. Accordingly, the knowledge administrator populates the recommended solutions list with these ten solutions. Users accessing the knowledge base will see these ten solutions in the Recommended Solutions view when accessing the knowledge base from Oracle iSupport.

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

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_SYS_ADMIN

Prerequisites

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

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

Steps

1. Navigate to Authoring > Top Solutions. The Recommended Solutions page appears.
2. To add a solution to the list, select Add. The Add Recommended Solution page appears. Type the Solution Number. Select Done.
3. To rearrange a solution, select the radio button next to the solution to be moved and select Move Up or Move Down.
4. To delete a solution from the list, select the radio button next to the solution to be deleted and select Delete.

4.7 Setting Up Definitions for Frequently Used Solutions

Users in iSupport can view a list of Frequently Used Solutions, which is a list of solutions that have been used within a specified time period. These time periods are defined and deleted in Knowledge Management. In addition, the default time period or definition is set in Knowledge Management.

The number of definitions should be manageable and each definition should have a descriptive name that is easy to understand.

Example 4–3 Definitions for Frequently Used Solutions

A knowledge administrator needs to create definitions for viewing frequently used solutions, so that users accessing the knowledge base can have multiple values from which to choose on the list. The company has determined that the most logical breakdown for the definitions is in 30 day rolling increments and has decided to limit the definitions to 90 days or less. Accordingly, the knowledge administrator creates three definitions: 1) The last 30 days 2) The last 60 days 3) The last 90 days

Use this procedure to add a definition.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

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

Steps

1. Navigate to Setup > Frequently Used Definition. The Frequently Used Definitions page appears.
2. Select the time period that you want to use as a default time period.

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

3. Select Update.
4. To add a new time period, select Add. The Add Definition page appears.
5. Type the new name, description, and number of days.
6. Select Save.

4.8 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.

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*.

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.

Managing Solution Types

This chapter includes information about solution types and the tasks associated with solution types in Knowledge Management. The sections include:

- Section 5.1, "Overview of Managing Solution Types"
- Section 5.2, "Creating a New Solution Type"
- Section 5.3, "Associating a Statement Type to a Solution Type"
- Section 5.4, "Disassociating a Statement Type from a Solution Type"
- Section 5.5, "Viewing a Solution Type"
- Section 5.6, "Updating a Solution Type"
- Section 5.7, "Deleting a Solution Type"

5.1 Overview of Managing Solution Types

A solution type is created by a knowledge administrator to help describe and classify solutions within the knowledge base. When a solution type is created it is assigned a name, description, and a start and end date. In addition, mandatory statement types are defined to ensure that solutions classified within that solution type have a similar format. For example, Oracle's Knowledge Management is seeded with the symptom/cause/action (SCA) solution type which requires that any solution categorized as SCA contain a symptom statement, a cause statement, and an action statement.

A solution type should have a self-descriptive and intuitive name and should follow the merchant's naming conventions. Organizing solutions into solution types makes searching for solutions more precise and the results more effective. A knowledge administrator can create an unlimited number of solution types for their

company's specific needs, however, the knowledge base will be more effective and easier to manage if the number of solution types is limited.

Examples of common solution types are:

- SCA (Symptom/Cause/Action)
- PR (Problem/Resolution)
- QA (Question/Answer)

5.2 Creating a New Solution Type

Oracle's Knowledge Management is seeded with the solution/cause/action (SCA) solution type. Perform the following procedure to create a new solution type. Knowledge Management system prevents the creation of duplicate solution types.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

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

Steps

1. Navigate to Setup > Create Type. The Create Type page appears.
2. From the Type list, choose Solution.
3. Type a name for the solution type in the Name field.
4. In the Description field, briefly describe the solution type. The description of a solution type is only for administrators and cannot be viewed by a customer.
5. Change the date in the Start Date field.
6. Change the date in the End Date field.

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.

7. Select Create. The Solution Type page reappears with a Related section to add statements and external links.

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.

8. Add a statement type:
 - a. To add a statement type to the existing solution, choose the desired statement type from the Available Statements Types box
 - b. Click the right arrow to assign it to the Selected Statement Types box. You can sort the selected statement types by using the up and down arrows.
 - c. Select Save to save the changes or select Cancel to restore the original values and return to the previous page.

5.3 Associating a Statement Type to a Solution Type

You can add additional statement types to a solution type.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Setup > Solution Types. The Solution Type page with a list of existing Solution Types appears.
2. Select the Solution Type Number link. The Solution Type page for the Solution Type Number appears.
3. Select Add/Delete. The Associate Statement Types page appears.

4. To add a statement type to the existing solution, choose the desired statement type from the Available Statements Types box and click the right arrow to add it to the Selected Statement Types box. You can sort the selected statement types by using the up and down arrows.
5. Select Save to save the changes or select Cancel to restore the original values and return to the previous page.

5.4 Disassociating a Statement Type from a Solution Type

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

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Steps

1. Navigate to Setup > Solution Types. The Solution Type page with a list of existing Solution Types appears.
2. Select Solution Type Number. The Solution Type page for the Solution Type Number appears.
3. Select Add/Delete. The Associate Statement Types page appears.
4. To delete a statement type from the existing solution, choose the desired statement type from the Selected Statement Types box and use the left-arrow key to move a statement that you want to disassociate to Available Statements Types box.
5. Select Save to save the changes or Cancel to restore the original values and return to the previous page.

5.5 Viewing a Solution Type

Use this procedure to view existing solution types.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

- CS_KB_KNOWLEDGE_WORKER
- CS_KB_AGENT
- CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Setup > Solution Types. The Solution Types page displaying a list of existing solution types appears.
2. Select the numbered link to navigate to the Solution Type page for the selected solution type to view details about it. You can also update the solution type and add/delete statement types or external links to this solution type.

5.6 Updating a Solution Type

Use this procedure to update an existing solution type.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

- CS_KB_SYS_ADMIN

Prerequisites

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

Steps

1. Navigate to Setup > Solution Types. Solution Types page with a list of existing solution types appears.
2. Select Solution Type Number. The Solution Type page for that Solution Type Number appears.
3. To update the name or description of the Solution Type, enter the new information in the appropriate fields.
4. Select Update.
5. To update the related statements types or external links, make the required selections.
6. Select Update to save the changes. Select Restore to return to the original values and not save the changes. Select Delete to delete the solution type.

5.7 Deleting a Solution Type

Use this procedure to delete a solution type. You cannot delete the default solution type, symptom, cause, action (SCA). You can delete a solution type if it has not been used by any solution. This procedure cannot be undone.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

- Knowledge Management administrators must have edit permissions (CS_Type_Edit) to delete a statement type.
- Delete any statement types associated to this solution type

Steps

1. Navigate to Setup> Solution Types. The Solution Types page appears.
2. Select the numbered link of the solution type that you want to delete.

3. In the Solution Type page, ensure that there are no related statements types/external links listed in the Related sub section.
4. To remove related statement types:
 - a. Select Add/Delete. The Associate Statement Types page appears. Disassociate the statement type from that solution type.
 - b. Select Save. Solution Type page reappears with no statement types or external links appearing in the Related section.
5. After removing the related statement types, select Delete.

Managing Statement Types

This chapter includes information about statement types and the tasks associated with statement types in Knowledge Management. The sections include:

Section 6.1, "Overview of Managing Statement Types"

Section 6.2, "Creating a Statement Type"

Section 6.3, "Viewing a Statement Type"

Section 6.4, "Updating an Existing Statement Type"

Section 6.5, "Deleting a Statement Type"

6.1 Overview of Managing Statement Types

A statement is a description of any aspect of a problem, its cause, or its resolution. Statements in Knowledge Management are organized into statement types. A statement type is an identifying name associated with a particular part of the solution type. For example, symptom is a statement type within symptom/cause/action solution type.

Statement types help organize statements by providing segmentation to the knowledge base and they should have descriptive and intuitive names. A knowledge administrator can create an unlimited number of statement types for their company's specific needs, however, the knowledge base will be more effective and easier to manage if the number of statement types is limited.

Note: Statement types in Knowledge Management can be mapped to note types in Oracle TeleService.

If a statement type is mapped to a note type and users access Knowledge Management through the advanced search from Teleservice, the note types that are mapped to the statement types will be pulled over as statement criteria in the Statement section of the Advanced Search page

6.2 Creating a Statement Type

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisite

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

Steps

1. Navigate to Setup > Create Type. The Create Type page appears.
2. In the Type list, select Statement.
3. Type a name for the statement type in the Name field.
4. Type a description for the statement type in the Description field.
5. Change the date in the Start Date field.
6. Change the date in the End Date field.

End dating a statement type will prevent any further statements of this type from being created after the end date has expired. Statements currently in progress will be allowed to complete. End dating does not delete the statement type from the database.

7. Select Create. The Statement Type page reappears with a Related section. You can also relate this statement type to a solution type or external links. To relate this statement type to an external link (e.g, a JTF Note Type), perform the following steps:
 - a. In the Related section, select External Links from the list.
 - b. Select Add. Select an External Object page appears. Select Note Type. You can relate one statement type to only one note type.
 - c. The Note Type page appears. Search for the note type that you want to add to this statement type. Use % for wildcard search.
 - d. Search results appear. Select the JTF note type that you want to add to the statement type. Select Update. The Statement Type page reappears.

6.3 Viewing a Statement Type

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

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

Steps

1. Navigate to Setup> Statement Types. The Statement Types page appears.
2. Select the numbered link to navigate to the Statement Type page for the selected statement type.

6.4 Updating an Existing Statement Type

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

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

Steps

1. Navigate to Setup> Statement Types. The Statement Types page appears.
2. Select the numbered link to navigate to the Statement Type page for the selected statement type.
3. Update the name or description of the statement type.
4. Select the Update beneath the End Date field.
5. In the Related section, you can add or update the solution types or external links.
6. Select Update.

6.5 Deleting a Statement Type

Use this procedure to delete a statement type. You cannot delete the default statement type. You can only delete a statement type if it has never been used by any statement. This procedure cannot be undone.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

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

- Remove a solution type or external link being used by a statement type

Steps

1. Navigate to Setup> Statement Types. The Statement Types page appears.
2. Select on the numbered link of the statement type that you want to delete.
3. In the Statement Type page, ensure that there are no related solutions types or external links listed in the Related sub section.
4. To remove a solution type or an external link being used by a statement type:
 - a. In the Remove column, check the boxes corresponding to the related solution types or external links. You cannot remove a solution type if it is associated with existing solutions in the knowledge base.
 - b. Select Update.
5. After removing the related solution types or external links, select Delete.

Managing Categories

This chapter includes information about categories and the tasks associated with categories in Knowledge Management. The sections include:

- Section 7.1, "Overview of Managing Categories"
- Section 7.2, "Managing Solution Categories"

7.1 Overview of Managing Categories

Categorization of solutions is the process of separating solutions into categories for browsing or for performing a category-specific search for solutions. Solutions are organized into categories for easy management. Using the analogy of a library, fiction could be characterized as a category, mysteries and classics could be characterized as subcategories, and book titles could be compared to solutions.

Because Knowledge Management allows manual category definition on its user interface it is important that categories have descriptive and intuitive names that will assist users who are searching for solutions. While a knowledge administrator can create an unlimited number of categories for their company's specific needs, categories are more effective and easier for users to navigate if their number is limited.

Categories can be both product-based and non product-based listings.

Example 7-1 Product Categories

Software Company ABC sets up product-based categories as follows: Applications, Database, Operating Systems, and Tools:

Example 7-2 Non-Product Categories

Software company XYZ sets up non-product-based categories as follows: Support

Solutions, Consulting Solutions, and Training Solutions.

Using Categories

Categories can be used by knowledge administrators and users to effectively manage the knowledge base.

Managing Categories

Knowledge administrators define and manage the number of categories in the knowledge base to ensure categories are meaningful. It is important that the knowledge administrator create enough categories for the segmentation to be useful but not create so many categories that hierarchy becomes unmanageable.

Adding Categories to Solutions

Knowledge workers can add more than one category to a solution. This is useful to categories that reference more than one product area. For example, a computer manufacturer might have a solution that addresses issues with both a printer and a laptop. If that company had categories set up for Computers and Printers, it would make sense to add both of the categories to the solution.

Browsing Categories

Knowledge Workers can navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base in order to find published solutions.

Filtering Search Results

Users can use categories as filters when conducting an advanced search to narrow search results.

7.2 Managing Solution Categories

You can add solution categories from the Manage Solution Categories page.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Setup> Categories. The Manage Solution Categories page appears.
2. Select the root category or one of the child categories to which you would like to add categories by selecting the corresponding radio button.
3. Select Add. A new field defaulted as New Category appears.
4. Overwrite the field by entering a new category name in that field.
5. Select Save.

You can view the new category by navigating to the Knowledge Base Search page on the Knowledge tab.

7.2.1 Editing Solution Categories

You can edit the names of solution categories from the Manage Solution Categories page.

Login

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Setup> Categories. The Manage Solution Categories page appears.
2. Select the root category or one of the child categories that you want to edit by selecting the corresponding radio button.
3. Select Edit. The selected category name appears as an editable field.
4. Edit the category name.
5. Select save.

7.2.2 Deleting Solution Categories

You can delete solution categories from the Manage Solution Categories page. Categories containing sub-categories or solutions cannot be deleted.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

None

Steps

1. Navigate to Setup> Categories. The Manage Solution Categories page appears.
2. Select the category that you want to delete by selecting the corresponding radio button.
3. Select Delete. You will be prompted with a confirmation asking if you are sure you want to delete this category. Select Ok and the category is deleted.

Managing Authoring Flows

This chapter includes an overview about authoring flows and tasks associated with authoring flows in Knowledge Management. The sections include:

- Section 8.1, "Overview of Managing Authoring Flows"
- Section 8.2, "Creating a New Authoring Flow"
- Section 8.3, "Viewing and Modifying Authoring Flows"

8.1 Overview of Managing Authoring Flows

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

A solution author has an option to either save the solution to his/her own work area or to save and submit the solution to an authoring flow for further processing in the Solution Detail page. For more information about workflows, see the latest version of *Oracle Workflow Guide*.

Understanding Solution Authoring Flow in Knowledge Management

A solution authoring flow in Knowledge Management is comprised of a series of steps that a solution goes through before reaching a desired state. Each step in the authoring flow has a resource group assigned to it for an action to be taken. The resource group can be comprised of one or more members. A Knowledge Management administrator can define and choose each step of an authoring flow and assign a resource group to each step of an authoring flow and, choose an action at each step of the flow. Notifications can be sent when each step is completed, to

users in a resource group depending on the solution authoring profile of the users. The notification is only for information.

When a solution is submitted to an authoring flow, a copy of the solution remains outside the authoring flow for immediate viewing by others and a new copy is created for processing within the authoring flow. The authoring flow can be as simple as one step such as publish, or it can be as complex as a business requires.

Example 8-1 Authoring Flow in Knowledge Management Example

1. An author begins creating a solution in the Solution Detail page. The solution is saved as a work-in-progress solution and has a saved status. It can be seen in the Solutions in Progress page.
2. An author can continue to work on his solution-in-progress solution. After completing the solution, he can select Save and Submit to Authoring Flow from the Solution Detail page.
3. The Available Authoring Flows page appears. Choose an appropriate workflow from the list. Also, select the step to which you want to submit the solution. The solution cannot be accessed from the author's Solutions in Progress page.
4. The members of the resource group assigned to the authoring flow step that you select are notified of the solution to be reviewed. Members who want to receive a notification have to subscribe to a category or a product in the Solution Authoring Profile page and the solution has to be related to the subscribed product/category.
5. Any member of the resource group, can navigate to the Search Solutions in Progress page and search for the solution that is ready to be reviewed. After the solution is found, a member can select Check-Out to lock the solution. No other member can work on this solution until it is back in the authoring flow.

Note: A system administrator can get the lock for a solution that has been locked by another user if the person who had locked the solution is no longer available to unlock it and put it back in the authoring flow.

6. A member can review the solution, make edits, move the solution to the next step (to continue the current authoring flow), or reject the solution.

7. A member can select the next or previous step for the solution. If the solution is rejected to an author, then the solution will appear in the Author's Solution in Progress page and he can check-out the solution, review comments, make required edits, and Save and Submit the solution back to the authoring flow.
8. When the solution is submitted to a step whose action is publish, then the solution is published.

8.2 Creating a New Authoring Flow

A Knowledge Management administrator can setup an authoring flow. For each authoring flow, you can define the following parameters: order, step, assigned to, and action.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

Administrative permissions to create a new authoring flow.

Steps

1. Navigate to Setup > Authoring Flows. The Authoring Flows page appears.
2. Select Create. The Authoring Flow Set Up page appears.
3. Type a flow name.
4. For each row, enter an order number, select the Step, Assigned to, and Actions fields.
 - Order: defines the sequence of steps in an authoring flow. It is a numbered order determining how the steps in a flow will be viewed. For example, a step with an order number 1 will be viewed before a step with the order number 5.
 - Step: represents the various transitions within an authoring flow. An authoring flow can be assigned any of the following steps: Deleted, Draft, Editorial Review, Public, Public Internal, Public Limited, Published,

Technical Review, and Under Edit. You can modify these steps by modifying the CS_KB_STATUS lookup type.

- Assigned To: represents the resource group that has permissions to check out and modify a solution in a specific step of an authoring flow. Each step in an authoring flow can be assigned to any of the available user groups that have required permissions. For example, Business User Group, Editorial Reviewers, Technical Reviewers, etc.
- Action: represents the action that the Knowledge Management system has to take at each step of an authoring flow. An authoring flow can have Notify, Obsolete, or Publish actions. These actions imply the following:
 - * Notify: a notification is sent to the members of the resource group assigned to this step.
 - * Obsolete: in Knowledge Management, a flag for the solution is set to Obsolete. The solution is still retained in the database, but it is no longer visible to any user. A notification is sent to the members of the resource group assigned to this step.
 - * Publish: in Knowledge Management, a flag for the solution is set to Publish. If the distribution for the solution in the Solution Detail page had been set to External, then the solution is visible to external users. A notification is sent to the members of the resource group assigned to this step.

5. Select Update.

Enabling and Disabling an Authoring Flow

A Knowledge Management administrator can enable or disable the authoring flows that have been created.

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

Administrative permissions to create a new authoring flow.

Steps

1. Navigate to Setup >Authoring Flows. The Authoring Flows page appears.
2. Identify the authoring flow you would like to enable or disable.
 - To enable a flow, select the Enable box corresponding to the authoring flow.
 - To disable a flow, deselect the Enable box corresponding to the authoring flow.
3. Click Apply to save the changes.

8.3 Viewing and Modifying Authoring Flows

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

Login

Navigate to the Oracle Applications login page at:

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

Responsibility

CS_KB_SYS_ADMIN

Prerequisites

Administrative permissions to view (CS_Workflow_Setup_View) a workflow.

Steps

1. Navigate to Setup >Authoring Flows. The Available Flows page appears.
2. Select the Update More Details icon corresponding to the authoring flow. The Authoring Flow Set Up page appears with the authoring flow details.

On this page you can modify the Order, Step, Assigned To, and Actions parameters for each authoring flow.
3. To modify the Order, renumber the step numbers.
4. To modify a Step, choose a new value from the Step list for the corresponding step.
5. To modify the Assign To group, choose a new value from the Assign To list for the corresponding step.

6. To modify an Action, choose a new value from the Action list for the corresponding step.
7. Add a new row of values by selecting the More Rows arrow and enter the Order, Step, Assigned To, and Actions values.
8. Delete a row by selecting Remove.
9. After you have finished editing, select Update. The changes will be saved and the Authoring Flow Set Up page will display the modified authoring flow.

Knowledge Management Frequently Asked Questions

A.1 Frequently Asked Questions

What is Knowledge Management?

Knowledge management is the process by which knowledge is identified, accessed, enhanced, and protected through the use of advanced technology, user friendly portals, and the development of a culture of openness, sharing, and collaboration.

Knowledge becomes an asset for an organization only when it is available in an ordered and accessible format for use by its employees and customers. Knowledge can exist in different structured formats such as databases, white papers, presentations, etc.

Knowledge management is designed to prevent duplication of effort, and poor decision making due lack of quality information. Knowledge management is also designed to improve communication, reduce costs, and to develop competitive advantage.

More than eighty percent of incoming customer assistance requests to service centers involve issues that have already been resolved. If a knowledge management system is not available, a frequently-posed question has to be repeatedly researched and relayed by the agent. In this scenario, several costs, both real and in terms of customer satisfaction, are incurred. Real costs are associated with the life cycle of the problem: customer service representatives must answer the initial customer call, log the problem, request more information, escalate the problem, deal with bugs, find out if a solution already exists, communicate the fix back to the customer, and close the problem. Intangible costs are associated with low customer and agent satisfaction.

A good knowledge management system helps build strong customer relationships by enhancing the customer experience with a company's product or service. A knowledge management module is an important part of any complete customer support application. It allows customer support representatives to match the problem that they face with the problems that have been previously experienced and recorded. Reuse of existing problem descriptions and solutions, improves customer service efficiency.

What is the business need of Knowledge Management?

Customer expectations are driving customer service innovations. To meet the round-the-clock demands of the Internet, e-commerce sites must provide additional personnel to handle customer support needs. Unless you can afford a 24/7 staffed call center, you'll have to make preparations for middle of the night shoppers and Internet users in global time zones.

Knowledge bases are an excellent way to provide information to customers on a self-serve basis, particularly for complex services, such as technical support. If your visitors are coming to you with questions about installing a new sound card, upgrading the BIOS, installing a modem, or cleaning up after a virus, then you'll most likely need more than an FAQ.

What is Oracle's Knowledge Management?

Oracle's Knowledge Management is a solution management and document access system that allows customers to search for and resolve their own issues. It has a tight integration with other Oracle applications.

Oracle's Knowledge Management also provides easy solution capture and immediate access to new solutions. The relational aspect of Knowledge Management provides focused results that relate more directly to the issues being researched.

Using natural language queries, customers are able to find immediate and accurate solutions to problems and answers to questions, thereby attaining satisfaction quickly and increasing your return on investment. Self service support can present a viable 24/7 alternative to heavily staffed call centers at a fraction of the cost.

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

What is it aimed to do?

Oracle's Knowledge Management aims to:

- Reduce support operation costs
- Retain profitable customers
- Address diverse customer needs by providing the information to meet those needs
- Empower customers to help themselves through web self-service 24 x 7
- Increase customer satisfaction
- Increase support agent satisfaction and retention

Why is this important?

The phone has been the traditional method for an organization for delivering service to its customers. A clear global trend is increasing customer usage of the web to receive answers to their questions immediately. Internet enabled self service has become the most important trend in customer service because customers can get service wherever and whenever they want without waiting in phone queues.

Are there any techniques to help in searching the Knowledge Base effectively?

You can use the Advanced Search functionality, or the category headings on the Basic Search page to reduce the number of solutions for your query. A search performed by entering a word or a phrase in the Basic Search page will search the entire Knowledge Base.

What search method should I use, if I don't know the Solution Number?

If a Solution Number is not known, then you can use the keyword search. This search is not case sensitive. More keywords will result in a narrower search. Enter appropriate keywords for quicker and more specific results.

After checking out and locking a solution, how can I check it in, without having to submit it to a work flow?

There is currently no way to check in a solution. You have to Save and Submit a solution back to a workflow.

How do I publish a statement?

A newly created statement is by default in the draft status. It is published when the solution that it is associated with is published.

What is “Oracle Trading Community”?

Trading Community and Trading Community Architecture (TCA) is an architecture designed to support trading communities. The goal of TCA is to provide the foundation for Oracle applications. To do this, TCA strives to model all relationships within a ‘trading community’. This enables one data model to store B2B, B2B2C, B2C and B2C2C data. For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers and business consumers. The appliance manufacturer not only wishes to track relationships between itself and other entities within the trading community. The manufacturer may also be interested in relationships that other community members have with each other. The appliance manufacturer may not even have direct relationships with all the members of its trading community. But, it is important that the appliance manufacturer knows about these entities and how they relate to other entities within the community. Important to point out is that there is only one customer data model/schema, used in all Oracle Applications. The 11i Customer Model is not a product that can be purchased, Rather, it is the underlying data model that stores customer information and is included with any Oracle application. All CRM modules utilize the Customer Model to store customer information, although the degree to which the Customer Model is utilized differs from module to module.

Does Oracle’s Knowledge Management support different languages

Yes. Oracle’s Knowledge Management is MLS (Multi Lingual Support) compliant and supports multiple languages. Users can set the preferences to a language that they like to display and this can be changed at any time. For example, customers at one particular site can change to a combination of English and Spanish at the same site.

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

When you create a solution in one language, a copy of the solution is also 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. You need to make sure that the solution is ready for all the installed languages before you assign the publish status to the solution.

How do I customize Oracle's Knowledge Management?

Oracle JDeveloper can be used for Knowledge Management custom development. It can be used to write, debug, deploy, and test Java and JSP applications. You can customize menu, roles, permissions, responsibilities and AK prompts. You can also customize lookups and profile options.

Are there options available in the Rapid Installer for Oracle's Knowledge Management?

No

Where are the documents in Knowledge Management stored?

Solutions in Knowledge Management are stored on the main instance where Knowledge Management is installed.

How are attachments to solutions in Knowledge Management stored?

Attachments are stored on the database.

Why can't I find the solution that I created when I search for them using Advanced Search or Basic Search pages?

To see the new solutions, you have to first run the Knowledge Base Sync index concurrent program to refresh the data in the knowledge base.

You also have to check the distribution level. To view restricted solutions, you need to have the role with View_Solution_Restricted permission.

While doing a Knowledge Base Search, why can't I find statements that I used in creating a solution.

The solution that you have created is in a draft status.

- You cannot search draft solutions and statements in Basic or Advanced Search.
- You can only find in-progress solutions in the Solutions in Progress pages, including the search for solutions in progress.

Publish your solution and run the sync index program again to search both published solutions and statements from Basic Search/Advanced Search/Statement Search pages.

Display Search Option List

B.1 Describing Searching Methods

The Searching Method displays in the Advanced Search page only if the Knowledge: Display Search Option List option is set to Yes. The default value is No.

The Knowledge: Default Searching Method profile option determines the default search option used in both advanced search and basic search (also known as unified search). Accumulate is the default searching value.

The following text search options are in Advanced Search if the option is set to Yes:

- All Keywords: This search uses the AND operator. The search results must match all terms in the query. For example, if you enter *Oracle server* as a search query, Oracle's Knowledge Management would read it as *Oracle AND server* and send it to Intermedia.
- Any Keywords: This search uses the OR operator. This search can match one or more query terms.
- Fuzzy Match: In this search, the query keywords are expanded into a set of similarly spelled keywords, before a search is performed. This search is helpful if there are frequent misspellings of the query keyword in the repository. The search will find incorrect spellings and synonym matches to the query terms.
- Theme: This is also called an *about search* in Intermedia. Intermedia categorizes the documents in its repository into themes, based on their textual content. When this search is performed, the query keywords are compared with the theme index. Documents having the same themes as the keywords appear in the result list. For example, if the query term is *soccer*, a document about the World Cup could be among the results. This search will determine the theme of the query and locate any references to that theme.

- **Accumulate:** This search will find documents that contain at least one of the query terms. The results are scored based on two criteria:
 - **Document term scores:** Each query keyword that appears in the result is given a score of 1 and the query keywords that don't appear in the result are given a score of 0.
 - **Document term weights:** Refers to the total weight that you place on each query term. For example, a query such as x, y, z may have term weights of 1 for each term. A query such as x, 3*y, z may have term weights of 1, 3, and 1 for each term in that order. The highest score is assigned to documents that have the highest total term weight.
- **Intermedia:** In this search you can enter your own Intermedia operators like OR, AND, PHRASE, +, -, etc. If you do not enter an operator, this search performs a phrase search. It was previously known as Intermedia Syntax search.
- **Reference Number:** Every solution in Oracle's Knowledge Management is assigned a unique number. This search will find the solution that is associated with the number entered in the search query field.

The Reference Number option should not be set as the default search method.

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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