

**Oracle® Knowledge Management**

Implementation and Administration Guide

Release 12

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Oracle Knowledge Management Implementation and Administration Guide, Release 12

Part No. B25892-01

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## Oracle Knowledge Management Implementation and Administration Guide, Release 12

### Part No. B25892-01

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
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# Preface

## Intended Audience

Welcome to Release 12 of the *Oracle Knowledge Management Implementation and Administration Guide*.

This guide is intended for members of the vendor organization who are responsible for implementing and administering the Oracle Knowledge Management application.

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

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

To learn more about Oracle Applications Framework applications, refer to the *Oracle Application Framework Personalization Guide*.

- JTT

To learn more about JTT applications, refer to the *Oracle Applications CRM System Administrator's Guide*.

- The Oracle Applications graphical user interface

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

See Related Information Sources on page xiii for more Oracle Applications product information.

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## Structure

- 1 Introduction**
- 2 Dependencies and Integration Points**
- 3 Implementation Overview**
- 4 Implementation Tasks**
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- 6 Verifying Implementation**
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- 9 Managing Solution Types**
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- 11 Managing Categories**
- 12 Managing Authoring Flows**
- 13 Managing Repositories and Contexts**

This chapter is applicable only to service providers. For service requestors through Oracle iSupport, please refer to Customizations and Extensions, page 5-1.

- 14 Managing Security**

**15 Managing Autolinks**  
**A Seeded Information**  
**B Profile Options**  
**C Lookup Types**  
**D Concurrent Programs**  
**E Sample File For Solution Import Program**  
**F Frequently Asked Questions**  
**Glossary**

## Related Information Sources

### Related Documents

*Oracle Applications CRM System Administrator's Guide*

Refer to this guide for information on installing and using CRM technology components (JTT) to develop software solutions.

*Oracle Applications Concepts*

Refer to this guide for an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications. It provides a useful first book to read before an installation of Oracle Applications.

*Oracle Applications Framework Personalization Guide*

This guide describes how to personalize Oracle Application Framework-based Oracle E-Business Suite application pages as an end-user and as a personalization administrator using the Oracle Application Personalization Framework.

*Oracle Applications Installation Guide: Using Rapid Install*

Refer to this guide for instructions on managing the installation of Oracle Applications products. Much of the installation process is handled using Rapid Install, which minimizes the time to install Oracle Applications, the technology stack, and the Server technology stack by automating many of the required steps. This guide contains instructions for using 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 guides and implementation guides.

*Oracle Applications Multiple Organizations Implementation Guide*

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

*Oracle Applications System Administrator's Guide*

Refer to this guide for information on setting up foundation components and function and menu security.

*Oracle Applications User's Guide*

This guide explains how to enter data, query, run reports, and navigate using the

graphical user interface (GUI) available with this release of Oracle Knowledge Management (and any other Oracle Applications products). This guide also includes information on setting user profiles, in addition to running and reviewing reports and concurrent processes.

*Oracle Common Application Calendar Implementation Guide*

Refer to this guide for information about using the Notes component to achieve integration with the service request module.

*Oracle Depot Repair Implementation Guide*

Refer to this guide for information about integration with Oracle Depot Repair.

*Oracle Depot Repair User Guide*

Refer to this guide for information about how a repair agent can use Knowledge Management to solve problems.

*Oracle eMail Center Implementation Guide*

Refer to this guide for information on integration with Oracle eMail Center.

*Oracle eMail Center User Guide*

Refer to this guide for information on inbound e-mail processing.

*Oracle Field Service User Guide*

Refer to this guide for information about integration with Oracle Field Service.

*Oracle iSupport Implementation and Administration Guide*

Refer to this guide for information on permissions that control Oracle Knowledge Management page access.

*Oracle HRMS Implementation Guide*

Refer to this guide for information on accessing employee data.

*Oracle Inventory User's Guide*

Refer to this guide for information on ways to categorize solutions during solution search or solution creation.

*Oracle Partner Management Vendor User Guide*

Refer to this guide for information on ways that users of Oracle Partner Management can access Oracle Knowledge Management through Oracle iSupport.

*Oracle TeleService Implementation Guide*

Refer to this guide for information on ways that Contact Center users can navigate to Oracle Knowledge Management.

*Oracle Trading Community Architecture Technical Implementation Guide*

Refer to this guide for information on Resource Manager.

*Oracle Workflow Administrator's Guide*

Refer to this guide for information on sending notifications during authoring flows.

## Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## 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 an Oracle Applications form 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.



# Part 1

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## Getting Started

This part of the *Oracle Knowledge Management Implementation and Administration Guide* contains the following chapters:

- Introduction, page 1-1
- Before You Begin, page 2-1



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# Introduction

This chapter covers the following topics:

- Overview
- Key Features
- Integration
- System Requirements

## Overview

Oracle Knowledge Management is an information management system that uses knowledge capture, storage, and distribution tools that Oracle has developed. Implementing Oracle Knowledge Management provides the features of solution search, creation, organization, and 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 provides solution management functionality to other Oracle Applications, such as Oracle iSupport, Oracle TeleService, Oracle Field Service, Oracle Depot Repair, Oracle Customer Support, and Oracle EMail Center. The architecture supports diverse use. Other Oracle products share the architecture.

You can classify information in Oracle Knowledge Management into different subject areas. You can set up different levels of access controls to restrict the access of information for different types of users.

## Key Features

Key features in Oracle Knowledge Management include:

- Flexible Structure of Knowledge, page 1-2

- Security Control on Data, page 1-2
- Effective Text Searching, page 1-2
- Solution Management, page 1-3

### **Flexible Structure of Knowledge**

The flexible structure of knowledge offers you:

- Categorization of Solutions, page 1-2
- Creation and Searching by Multiple Solution Types, page 1-2

### **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 retrieval by its users. A user can choose a category or a subcategory during search to direct the search to a specific information area.

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

Information in Oracle Knowledge Management is organized into solutions, which is a collection of statements. You can create multiple Solution Types to organize solutions. You can also search by either the **Symptom-Cause-Action** (default) Solution Type or any other Solution Type, such as **Problem and Resolution**, that you can create.

### **Security Control on Data**

Solution Security allows you to restrict which areas of the knowledge base that users can search and browse. It also provides the ability to control the categories for which a knowledge worker can create and update solutions.

Security for solutions and solution categories are based on:

- **Category Security Group** (also known as **Category Group**): Controls the part of the category tree that you can access.
- **Visibility**: Indicates how sensitive the category, solution or statement is on a linear scale. Solution and category visibility are extensible.

### **Effective Text Searching**

Oracle Knowledge Management provides searching capability through both structured and unstructured content. The application integrates with Oracle Text to provide the text searching functionality through structured knowledge such as service requests, solutions, and categories. Oracle Knowledge Management allows you to search using different search options, such as Any Keywords, or All Keywords. To focus search results, you can search for solutions under different products, platforms, or categories.

Scoring of each solution is based on the text match that Oracle Text performs. The

maximum score is 100. Solution scores vary depending on the search method that you are using.

The search score can incorporate users' feedback.

Oracle Knowledge Management provides the Simple Search to allow you to search for solutions and other useful information, such as service requests messages. You can include different repositories in the Simple Search. If you would like to perform a more detailed and expanded search on solutions, you can use the Advanced Solution Search.

With the enterprise search capability, which utilizes Oracle Secure Enterprise Search, you can search for *unstructured* content stored in external repositories such as file servers, in addition to the structured content stored in the Oracle Knowledge Management repository. The enterprise search capability is available both during the standalone knowledge search flow and the knowledge search flow during service request creation.

### **Solution Management**

Oracle Knowledge Management provides the functionality to create, update, and approve solutions. A solution is a structured piece of knowledge that consists of the following primary attributes: title, type, Visibility, an associated category, and statements. You can classify solutions by associating the solutions to items (products) or platforms. Solution can also contain attachments, task group templates, and references to external objects.

Oracle Knowledge Management provides an HTML content creation tool for those who create statements through the Rich Text Editor. While creating a statement, you can find matching statements in the knowledge base to prevent duplication. You can reuse statements in more than one solution.

When you work on a solution, you can lock the solution and work on a local copy before the solution is ready to submit for approval.

When the solution is ready for submission, you can preview the solution before submitting it. The preview allows users to detect any potential errors and correct mistakes in the solution content.

Solution reviewers can use comments as a communication channel.

## **Integration**

Oracle Knowledge Management integrates with:

- Oracle TeleService
- Oracle Customer Support
- Oracle Depot Repair
- Oracle Field Service

- Oracle iSupport
- Oracle Email Center
- Oracle Partner Management

Users of all these applications can search the same knowledge base for solutions and contribute new solutions to the knowledge base. For information on how these products integrate with Oracle Knowledge Management, see Integration, page 8-1.

## System Requirements

The hardware and software components required to implement Oracle Knowledge Management largely depend on your particular installation. For information on system requirements, see *Oracle Applications Installation Guide: Using Rapid Install* and the *Oracle Applications CRM System Administrator's Guide*.

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## Dependencies and Integration Points

This chapter covers the following topics:

- About This Chapter
- Related Documentation and Training
- Dependencies
- Installation and Dependency Verification

### About This Chapter

This chapter describes resources and dependencies that you must be familiar with before you implement Oracle Knowledge Management.

### Related Documentation and Training

The following documents provide information about Oracle Knowledge Management and integrated products:

- *Oracle iSupport Implementation and Administration Guide*
- *Oracle eMail Center User Guide*
- *Oracle eMail Center Implementation Guide*
- *Oracle Depot Repair User Guide*
- *Oracle Depot Repair Implementation Guide*
- *Oracle Field Service User Guide*

For information on how these products integrate with Oracle Knowledge Management, see *Integration*, page 8-1.

## Dependencies

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

### Mandatory Dependencies

Oracle Knowledge Management integrates with other Oracle modules to provide and extend its functionality. For Oracle Knowledge Management to run, you must set up the following mandatory modules:

- Oracle Application Foundation, page 2-2
- Oracle Text, page 2-2
- Oracle Human Resources, page 2-2
- Resource Manager and Notes, page 2-3
- Oracle CRM Technology Foundation, page 2-3

#### Oracle Application Foundation

The Oracle Application Foundation provides a collection of module components and facilities for building and adding extensions to Oracle Applications. It is a required dependency of all Oracle Application modules. Oracle Knowledge Management uses Oracle Applications Foundation to access all standard library objects, for example, users, menus, responsibilities, and profile options.

For more information, see:

- *Oracle Applications System Administrator's Guide*
- *Oracle Applications User's Guide*

#### Oracle Text

Oracle Text provides integrated management of free-form text stored in the database, on Web sites, or on file systems. It extends the Oracle SQL query language to provide content-based search and to retrieval information from formatted documents and free text. This lets you access a number of advanced text search capabilities from any SQL tool or interface. You do not have to do anything explicitly to set up Oracle Text. It comes with the tech stack as part of the database installation.

For more information about Oracle Text, navigate to:  
<http://otn.oracle.com/products/text/content.html>.

#### Oracle Human Resources

Oracle Knowledge Management uses Oracle Human Resources to get employee data.

Define or confirm the definitions of your employees in Oracle Human Resources Management System. For more information, see the *Oracle HRMS Implementation Guide*.

### **Resource Manager and Notes**

Oracle Knowledge Management leverages the following Oracle Common Application Components:

- **Resource Manager:** You use Resource Manager in Oracle Knowledge Management to set up the various resource groups for authoring flows. The Resource Manager provides lists of resources, such as individuals, groups, and teams, for applications to access and manage their resources. Resources are employees, supplier contacts, parties, and partners that different modules use to accomplish business objectives. You can use Resource Manager to import and view resources, define resources, define roles and role types, create teams and groups, and organize resources within those teams and groups.

For more information, see the *Oracle Trading Community Architecture Technical Implementation Guide*.

- **Notes:** Oracle Knowledge Management uses the Notes component to achieve the integration with service request through the Note Type to Statement Type mapping. You use the Notes component in Oracle Knowledge Management to map Statement Types to Note Types such that information from a service request can transfer to Oracle Knowledge Management for searching and creation of solutions.

For more information, see the *Oracle Common Application Calendar Implementation Guide*.

### **Oracle CRM Technology Foundation**

Oracle CRM Technology Foundation (JTT) provides Java-based infrastructure software that is used to develop E-Business solutions such as Sales, Marketing, Service, E-Commerce, Contracts, and Interaction Center applications. It offers a common platform for developing applications with HTML, XML, and Java. The CRM Technology Foundation also provides user-friendly windows for centralized setup and administration. This Web-based interface is called the System Administrator Console.

For more information, see the *Oracle Applications CRM System Administrator's Guide*.

## **Conditional Dependencies**

You can set up the following Oracle E-Business Suite modules or third party applications to provide additional functionality:

- Oracle Workflow, page 2-4
- Oracle Inventory, page 2-4
- Oracle Secure Enterprise Search Server, page 2-4

## Oracle Workflow

Oracle Knowledge Management uses Oracle Workflow to send notifications during the solution authoring flow. For more information, see the *Oracle Workflow Administrator's Guide*.

## Oracle Inventory

Oracle Inventory provides the product and platform lists that Oracle Knowledge Management uses to categorize solutions during solution search or solution creation. For more information, see the *Oracle Inventory User's Guide*.

You must set the following profile options for selecting product and platform items from Inventory:

- Knowledge: Default Product Category Set, page B-9
- Service: Default Platform Category Set

## Oracle Secure Enterprise Search Server

Oracle Knowledge Management provides access to an external search engine and allows that external system to provide search and crawling services, while integrating the information into Oracle Service applications. You can implement Oracle Secure Enterprise Search (SES) to search against content in web sites, files systems, or both. The integration of this system into Oracle Knowledge Management is entirely optional.

## Dependency Setup Checklist

The following table, Dependency Setup Checklist, page 2-4, provides a suggested order for setting up the Oracle Knowledge Management dependencies. You must perform the required steps. The optional steps can be necessary if you plan to use the related features or complete certain business functions.

If you do not plan to create solutions in Oracle Knowledge Management, but only leverage Oracle Secure Enterprise Search, then only steps 1, 2, and 8 are required.

### *Dependency Setup Checklist*

Check	Step	Item	Required or Optional
	1.	Install Software	Required
	2.	Set up Oracle Application Foundation	Required

Check	Step	Item	Required or Optional
	3.	Oracle Human Resources	Required
	4.	Oracle CRM Foundation	Required
	5.	Resource Manager and Notes	Required
	6.	Set up Oracle Workflow	Optional
	7.	Set up Oracle Inventory	Optional
	8.	Set Up Oracle Secure Enterprise Search Server	Optional

## Installation and Dependency Verification

Before you start configuring the profile options, search for solutions, or create solutions in Oracle Knowledge Management, verify that you have completed the installation of Oracle Knowledge Management. For more information, see the *Oracle Applications Installation Guide*.



# Part 2

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## Implementing Oracle Knowledge Management

This part of the Oracle Knowledge Management Implementation Guide contains the following chapters:

- Implementation Overview, page 3-1
- Implementation Tasks, page 4-1
- Customizations and Extensions, page 5-1



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## Implementation Overview

This chapter covers the following topics:

- About Implementation
- Access Control
- Job Roles and Process Flows
- Implementation Tasks

### About Implementation

This chapter provides an overview of how to access Oracle Knowledge Management, the associated job roles and process flows, and a summary of the implementation tasks.

### Access Control

In Oracle Knowledge Management, function and menu security control user access to the agent pages. The following sections discuss the setup of these security features.

Roles and permission control customer pages. For a list of permission that control Oracle Knowledge Management page access, see Roles and Permission, page A-1. For related information, see the *Oracle iSupport Implementation and Administration Guide*.

Topics in this section include:

- Set Up Function Security and Menu Security, page 3-1
- Menus, page 3-3
- Functions, page 3-6

### Set Up Function Security and Menu Security

You can use **function security** to restrict user access to certain functions and actions in

agent pages in Oracle Knowledge Management. An administrator also has the option of setting **menu security**. Menu security is a security setting that prevents user access to entire menus and submenus within Oracle Knowledge Management. You define both function security and menu security attributes at the Responsibility level.

For more information, see the *Oracle Applications System Administrator's Guide - Security*.

The following table, page 3-2 shows responsibilities, menus, and tabs that pertain to internal, agent Oracle Knowledge Management users. For customer-facing users, see the *Oracle iSupport Implementation and Administration Guide*.

**Responsibilities, Menus, and Tabs for Internal Users**

<b>Responsibility</b>	<b>Functional Role</b>	<b>Description</b>	<b>Menus</b>	<b>Tabs</b>	<b>Subtabs</b>
CS_KB_SYS_ADMIN	Knowledge Administrator	Sets up Oracle Knowledge Management system, such as knowledge base structure, security, and authoring flows for Oracle Knowledge Management users.	CS_KB_TOP_MENU	Knowledge, Authoring, and Setup	Knowledge: Search, Statements.  Authoring: Solutions in Progress, Recommended Solutions, Subscriptions  Setup: Categories, Security, Repositories, Authoring Flows, Types, Autolinks, Time Periods, Concurrent Requests.

Responsibility	Functional Role	Description	Menus	Tabs	Subtabs
CS_KB_KNOWLEDGE_WORKER	Knowledge Worker	Creates, edits, and reviews technical information in Oracle Knowledge Management.	CS_KB_TOP_KW_MENU	Knowledge, Authoring	Knowledge: Search, Statements.  Authoring: Solutions in Progress, Recommended Solutions, Subscriptions
CS_KB_AGENT	Customer Service Agent	Interacts with customers to record their problems and provides them existing solutions or creates new solutions.	<b>Note:</b> The Responsibility for agent can be the Responsibility of the applications that integrate with Oracle Knowledge Management, such as Service Agent, or Depot Repair User.	CS_KB_TOP_AG_MENU	Knowledge: Search. Authoring: Solutions in Progress, Subscriptions

### About Accessing Agent Pages

To access agent pages, use the Self-Service login (for example, PHP) instead of jtflogin.jsp.

Oracle Knowledge Management responsibilities must be of type **Self-Service**. Otherwise, jinitiator invokes when you start Oracle Knowledge Management.

## Menus

Oracle Knowledge Management has the following types of menus:

- **Responsibility:** Menus that are attached to the Responsibility setup.
- **Navigation:** Controls the tabs and subtabs that you see as you navigate in Oracle Knowledge Management.

- **Security:** Controls the list of functions that you can access.

The following table, page 3-4 shows a list of menus for Oracle Knowledge Management.

**Oracle Knowledge Management Menus**

<b>System Name</b>	<b>Menu</b>	<b>Description</b>
CS_KB_TOP_MENU	Knowledge Admin Root Menu	Responsibility menu for Oracle Knowledge Management Admin Responsibility
CS_KB_TOP_KW_MENU	Knowledge Worker Root Menu	Responsibility menu for Oracle Knowledge Management Knowledge Worker Responsibility
CS_KB_TOP_AG_MENU	Knowledge Agent Root Menu	Responsibility menu for Oracle Knowledge Management Agent Responsibility
CS_KB_HOMEPAGE	KM Home Page	Navigation menu for Oracle Knowledge Management
CS_KB_KNOWLEDGE_TAB	KM Knowledge Tab	Navigation menu for Knowledge tab
CS_KB_AUTHORIZING_TAB	KM Authoring Tab	Navigation menu for Authoring tab
CS_KB_ADMIN_TAB	KM Administration Tab	Navigation menu for Setup tab
CS_KB_SECURITY_TAB	KM Security Setup Tab	Navigation menu for Security subtab
CS_KB_TYPES_TAB	KM Type Setup Tab	Navigation menu for Types subtab
CS_KB_AUTOLINK_TAB	KM Autolink Setup Tab	Navigation menu for Autolinks subtab

<b>System Name</b>	<b>Menu</b>	<b>Description</b>
CS_KB_SMS_MENU	KM Administrator Security Menu	Security menu for Oracle Knowledge Management Admin
CS_KB_SMS_KW_MENU	KM Knowledge Worker Security Menu	Security menu for Oracle Knowledge Management Knowledge Worker
CS_KB_SMS_AG_MENU	KM Agent Security Menu	Security menu for Oracle Knowledge Management Agent
CS_KB_SMS_SEARCH_AG_MENU	KM Knowledge Security Menu	Security menu for Knowledge tab
CS_KB_UNISRCH_GRANT	KM Unified Search Security Menu	Security menu for Simple Search
CS_KB_VIEW_GRANT	KM View Solution and Statement Security Menu	Security menu for Solution and Statement Details
CS_KB_ADVSRCH_GRANT	KM Advanced Search Security Menu	Security menu for Advanced Solution Search
CS_KB_STMT_SRCH_GRANT	KM Statement Search Security Menu	Security menu for Statement Search
CS_KB_SMS_SOLUTION_KW_AG_MENU	KM Authoring Security Menu	Security menu for Authoring tab
CS_KB_WIP_GRANT	KM In Progress Solution Security Menu	Security menu for Solutions in Progress
CS_KB_SOLUTION_CREATE_GRANT	KM Create or Update Solution Security Menu	Security menu for Create/Update Solution
CS_KB_STMT_CREATE_GRANT	KM Create or Update Statement Security Menu	Security menu for Create/Update Statement
CS_KB_REC_SOLN_GRANT	KM Recommended Solutions Security Menu	Security menu for Recommended Solution Setup

<b>System Name</b>	<b>Menu</b>	<b>Description</b>
CS_KB_SMS_SETUP_MENU	KM Admin Setup Security Menu	Security menu for Setup tab
CS_KB_CATEGORY_SETUP_GRANT	KM Category Setup Security Menu	Security menu for Category Setup
CS_KB_CAT_GRP_SETUP_GRANT	KM Category Group Setup Security Menu	Security menu for Category Security Group Setup
CS_KB_VIS_SETUP_GRANT	KM Visibility Setup Security Menu	Security menu for Visibility Setup
CS_KB_REPOSITORY_SETUP_GRANT	KM Repository Setup Security Menu	Security menu for search repository setup
CS_KB_AUTOLINK_SETUP_GRANT	KM Autolink Setup Security Menu -	Security menu for Autolink setup

## Functions

For example, if you have defined your own menu for your own responsibility, and you would like to allow a user to access Oracle Knowledge Management, you can include **KM Agent Security Menu** as a submenu of your new menu such that users who have this new responsibility can perform activities that Oracle Knowledge Management agents can.

The following table, page 3-6 shows the functions that you can use to establish function security in Oracle Knowledge Management.

### **Oracle Knowledge Management Functions**

<b>System Name</b>	<b>Menu</b>	<b>Description</b>
CS_KB_SMS_SOLN_ASEARC_H_FN	CS_KB_SMS_SOLN_ASEARC_H_FN	Controls access to Advanced Solution Search.
CS_KB_SMS_SOLN_AUDITC_REATE_FN	CS_KB_SMS_SOLN_AUDITC_REATE_FN	Controls access to Create Solution button.

System Name	Menu	Description
CS_KB_GET_LOCK_FN	CS_KB_GET_LOCK_FN	Controls access to Get Lock button.
CS_KB_GLOBAL_UPDATE_FN	CS_KB_GLOBAL_UPDATE_FN	Controls access to Update button from Statement Search.
CS_KB_REC_SOL_ADD_FN	CS_KB_REC_SOL_ADD_FN	Controls access to update Recommended Solutions.
CS_KB_CATEGORY_DETAIL_FN	CS_KB_CATEGORY_DETAIL_FN	Controls access to update Category.

If you do not want to grant certain functions to a particular responsibility, then you can exclude the functions from that responsibility. For more information, see *Oracle Applications System Administrator's Guide*.

## Job Roles and Process Flows

Topics in this section include:

- About Process Flows and Associated Job Roles, page 3-7
- Knowledge Administrator Flows, page 3-9
- Knowledge Worker Flows, page 3-14

### About Process Flows and Associated Job Roles

The process flows that this section describes provide you with a general, high-level understanding of the tasks that Knowledge Administrators, Knowledge Workers, and end users perform in Oracle Knowledge Management.

The following table, page 3-8 provides a cross reference of the process flows and the associated job roles.

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

**Job Roles and Process Flows Matrix**

<b>Process Flows</b>	<b>Knowledge Administrator Flows, page 3-9</b>	<b>Knowledge Worker Flows, page 3-14</b>	<b>Customer Service Agent</b>	<b>End User Flows, page 8-5</b>
Create Authoring Flows, page 3-13	YES	NO	NO	NO
Manage the Knowledge Base Structure, page 3-10	YES	NO	NO	NO
Set Up Category Security Groups, page 3-13	YES	NO	NO	NO
Set Up Repositories, page 3-14	YES	NO	NO	NO
Set Up Autolinks, page 3-14	YES	NO	NO	NO
Create Top Solutions for Oracle, page 3-24	YES	YES	NO	NO
Author Solutions, page 3-15	YES	YES	YES	NO
Review Solutions in Progress, page 3-17	YES	YES	NO	NO
Update a Solution, page 3-20	YES	YES	YES	NO

<b>Process Flows</b>	<b>Knowledge Administrator Flows, page 3-9</b>	<b>Knowledge Worker Flows, page 3-14</b>	<b>Customer Service Agent</b>	<b>End User Flows, page 8-5</b>
Search the Knowledge Base, page 3-22	-	-	-	-
Conduct a Simple Search, page 8-5	YES	YES	YES	YES
Browse Solution Categories, page 8-6	YES	YES	YES	YES
Conduct an Advanced Solution Search	YES	YES	YES	YES
Search for Statements	YES	YES	NO	NO
View Top Solutions in Oracle iSupport, page 8-7	NO	NO	NO	YES

## Knowledge Administrator Flows

The flows that appear in this section are primary responsibilities of the knowledge administrator. The primary functions that knowledge administrators perform in Oracle Knowledge Management include:

- Manage the Knowledge Base Structure, page 3-10
- Set Up Category Security Group, page 3-13
- Create Authoring Flows, page 3-13
- Set Up Repositories, page 3-14
- Set Up Autolinks, page 3-14
- Create Top Solutions for Oracle iSupport Users, page 3-24

**Note:** Knowledge Administrators also perform some of the processes associated in this chapter with Knowledge Workers and end users. For a more complete listing of the tasks that a Knowledge Administrator can perform, see the Job Roles and Process Flows Matrix, page 3-8 table.

### **Manage the Knowledge Base Structure**

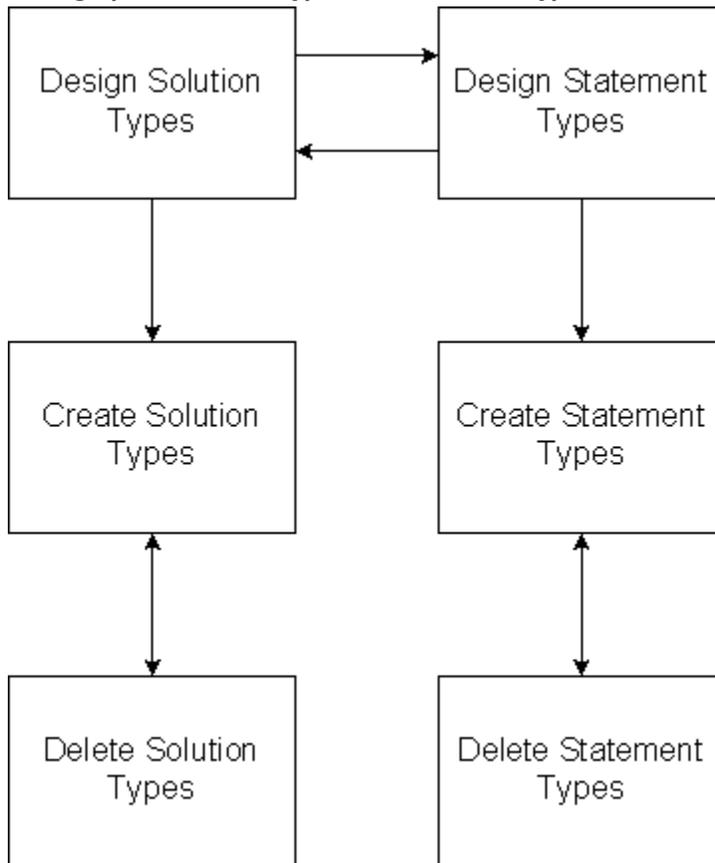
The knowledge base structure provides the basis for partitioning information in the knowledge base. Its main components are solution types, statement types, and solution categories. The following flow diagrams show the tasks that you perform to set up the knowledge base structure.

**Note:** Designing the knowledge base structure is a very important aspect of implementing Oracle Knowledge Management. After adding solutions to the solution types, it is difficult to change the knowledge base structure.

### **Set Up solution types and Statement Types**

solution types and statement types provide a structure for organizing the type of information that comprises solutions and statements in the knowledge base. The following figure is a flow diagram that shows the parallels in creating and maintaining solution types and statement types.

### ***Setting Up the Solution Types and Statement Types***



Although you create solution types and statement types separately, both are interrelated. You should design them in conjunction with the other:

- **Design Solution Types:** Determine the number of solution types that you need and the statement types that each solution type includes.
- **Design Statement Types:** Determine the number of statement types and a description of the content that comprises the statement type.

When the knowledge administrator designs the solution types and statement types, he or she must create the actual structures:

- **Create Solution Types:** Add solution types to knowledge base. You must associate at least one statement type with a solution type.
- **Create Statement Types:** Add statement types to the knowledge base.

To manage the knowledge base, the knowledge administrator must also know how to:

- **Delete a Solution Type:** Delete a solution type from the knowledge base. You

cannot delete a solution type if solutions are associated with the solution type.

- **Delete a Statement Type:** Delete a statement type from the knowledge base. You cannot delete a statement type that is associated with a solution in the knowledge base.

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

**Note:** You can end-date solution types when a solution type becomes obsolete or is no longer valid. End-dating the type becomes effective on the date that the Knowledge Administrator specified. When a solution type has been end-dated, no one can create new solutions of that type. However, solutions of that type remain in the knowledge base, and users can search and edit them.

**Note:** You can end-date statement types when an associated solution type is end-dated. You cannot end-date the statement type if relationships with other solution types are still valid.

**Note:** When a solution type or statement type has been end-dated, you cannot use that type in your search criteria.

### Set Up Solution Categories

Solution categories are folders that you use to sort solutions into logical groupings. The following figure shows a flow diagram of designing, creating, and deleting solution types.

#### Setting Up Solution Categories



Setting up and maintaining solution types involves:

- **Designing Solution Categories:** Determine how many solution types, the names of the solution types, and the category hierarchy.
- **Creating Solution Categories:** Create solution types.

- **Deleting Solution Categories:** Delete a solution type from the knowledge base. You cannot delete a solution type that has an associated solution.

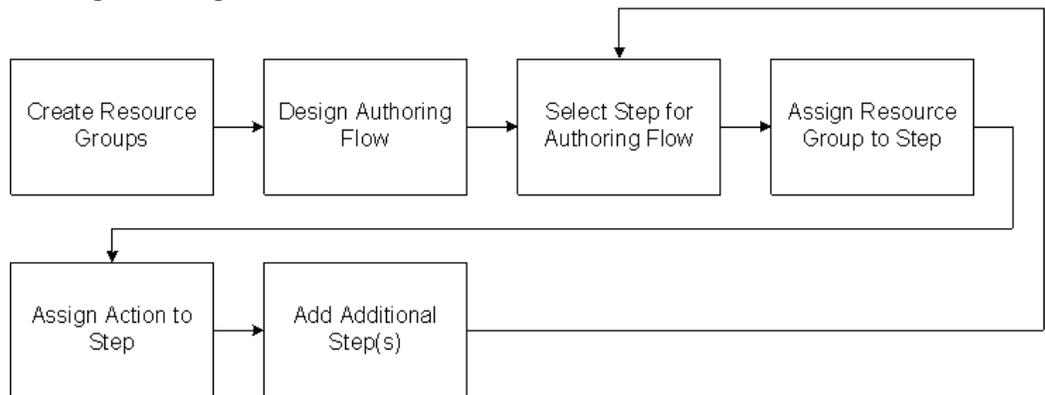
### Set Up Category Security Group

Category Security Groups are defined views of categories that determine whether or not a particular user can access a category, solution, and statement. Category Security Groups are subsets of the master category hierarchy and represent subject areas. After you define the master category hierarchy, you must also define the views--the Category Security Groups--of the master category hierarchy.

### Create Authoring Flows

You use authoring flows to automate the review and publication of solutions in the knowledge base. Knowledge administrators create authoring flows. The following figure shows the process to create authoring flows:

#### Creating Authoring Flows



Creating an authoring flow includes:

- **Creating resource groups:** Create groups of users whom you can assign to steps within the authoring flow process. For example, you can create a group called Editorial Reviewers, who are responsible for performing editorial reviews of solutions.
- **Designing authoring flow:** Specify the number of steps, their order within the authoring flow, the resource group associated with each step, and the action that follows each step. Before designing an authoring flow, it is important to understand which review steps and actions from which you can choose.
- **Specifying the step for authoring flow:** Add steps to the authoring flow, for example, Editorial Review.
- **Assigning action to step:** Assign an action to the step, for example, Publish.
- **Assigning resource group to step:** Assign the group that is responsible for

performing a particular step within the authoring flow.

- **Specifying additional step:** Add as many steps as you need to construct the authoring flow.

### Set Up Repositories

A repository resides on a file server or internal Web site and defines a collection of documents that can be searched.

Setting up repositories includes:

- Setting up Oracle Secure Enterprise Search to index data from the respective source.
- **Defining repositories:** Provide the name, type, and property details of desired repositories.
- **Mapping repositories to contexts:** Control access to defined repositories by assigning them to a particular context type, such as Responsibility, and value, such as iSupport User.

### Set Up Autolinks

Whenever a knowledge worker views a solution that contains a reference to an autolink's specified keyword, the reference appears as a hyperlink.

Setting up autolinks includes:

- **Defining autolinks:** Specify the keyword pattern, parameter properties, destination type, and date usage of autolinks. Also write any referenced function that is not already prepared.
- **Associating autolinks with the appropriate context:** Specify which context, such as Service Requester, is used with autolinks.
- **Previewing autolinks to ensure their correctness:** Test autolinks and consult the list of possible errors that may prevent a link from working.

## Knowledge Worker Flows

The primary tasks that knowledge workers perform in Oracle Knowledge Management include:

- Authoring Solutions, page 3-15
- Reviewing Solutions in Progress, page 3-17
- Update a Solution, page 3-20
- Search the Knowledge Base, page 3-22

- Create Top Solutions for Oracle iSupport Users, page 3-24

**Note:** Knowledge workers also perform some of the processes associated in this chapter with knowledge administrators and end users. For a more complete listing of the tasks that a knowledge administrator can perform, see the Job Roles and Process Flows Matrix, page 3-8 table.

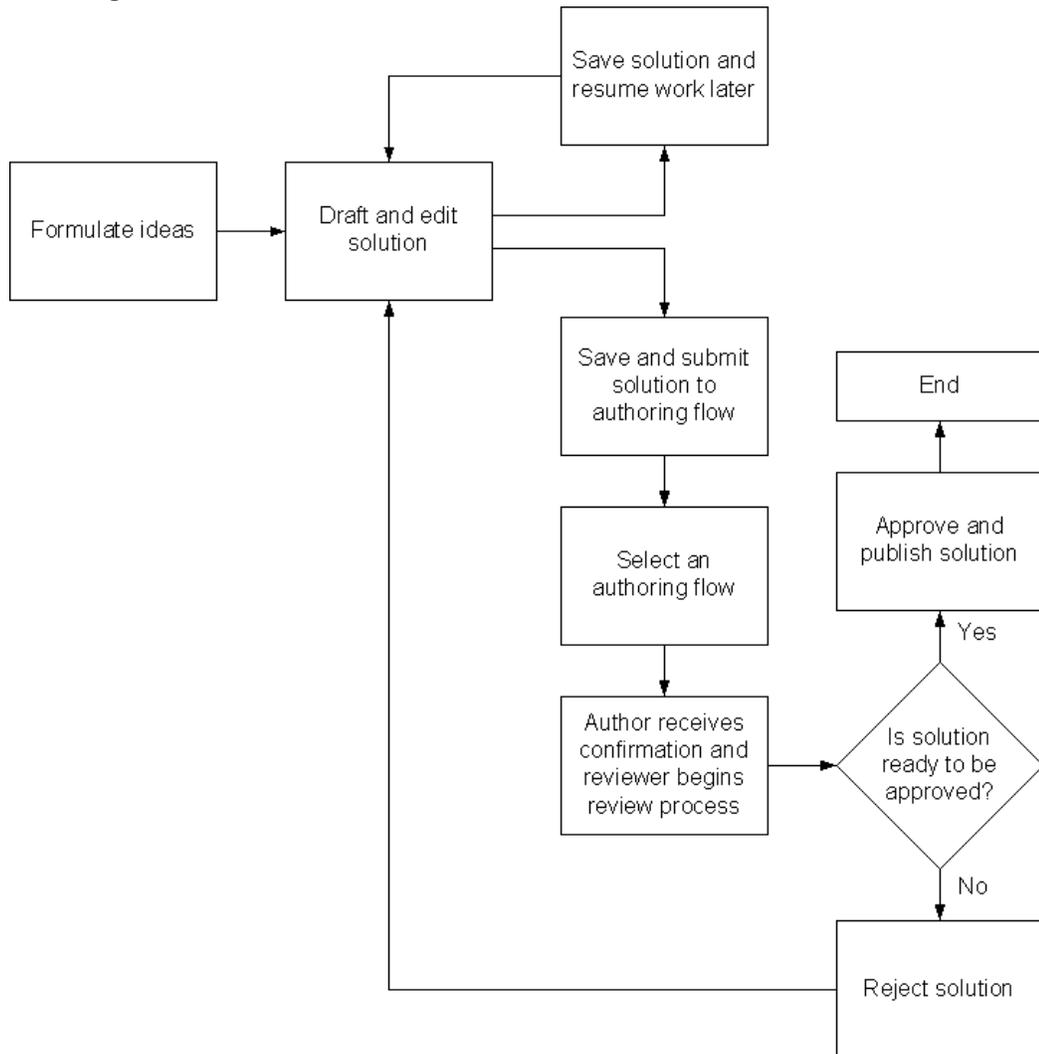
**Note:** The flows that appear in this section are the primary responsibilities of the knowledge worker.

### **Author Solutions**

Solutions are the cornerstone of the knowledge base. Knowledge workers are generally responsible for managing content in the knowledge base.

The following figure shows the tasks that you use to create a solution.

### Authoring a Solution



The tasks to consider for authoring solutions include:

- **Formulate ideas:** Determine the solutions that you need to create.
- **Draft and edit solutions:** Create the solution content and assign associated attributes to create a solution in Oracle Knowledge Management. You can review solutions on which you are currently working and have saved from the Solutions in Progress page.
- **Save solution and resume work later:** Save the solution so that you can work on it later.
- **Save solution and submit solution to authoring flow.**

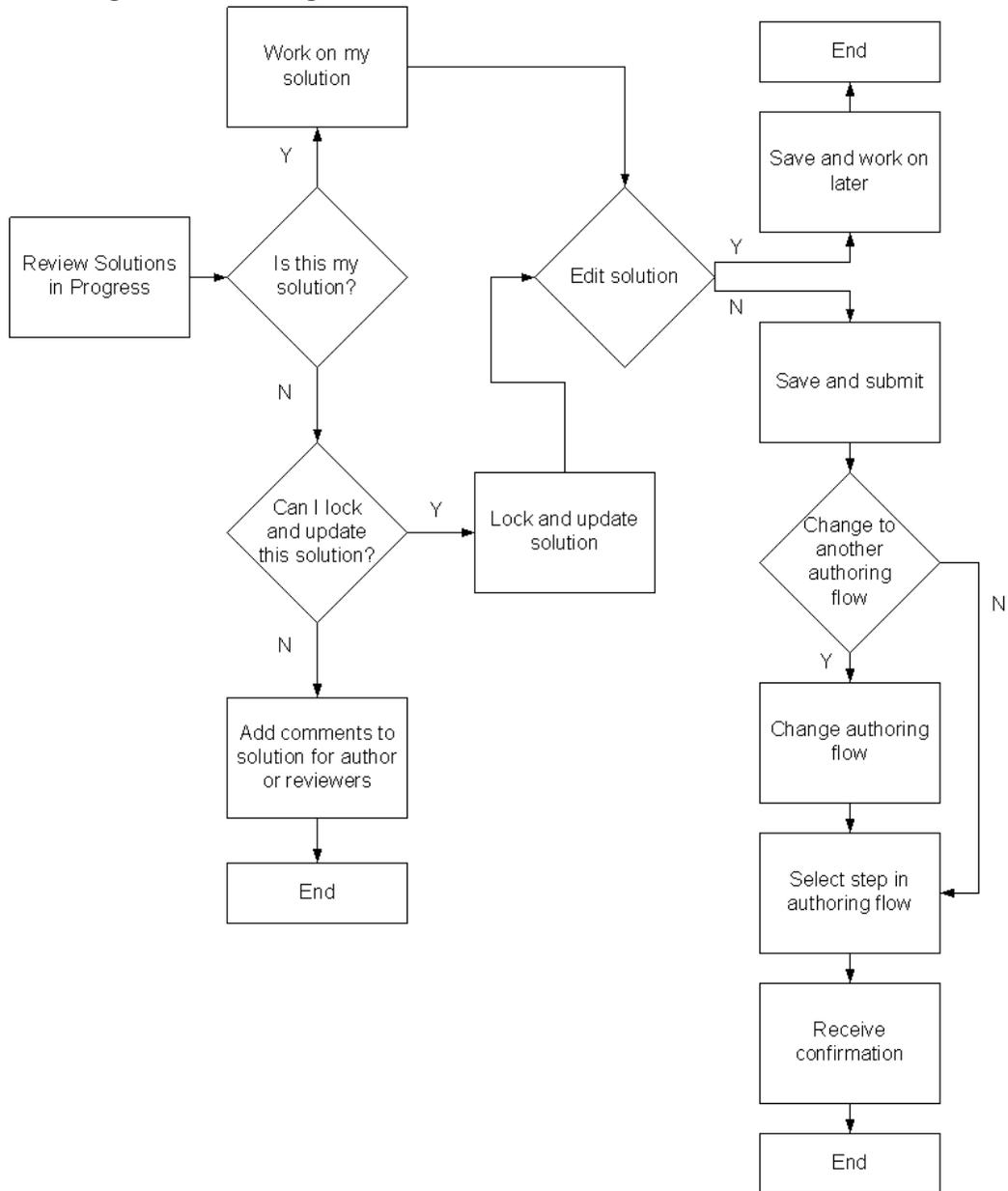
- **Select an authoring flow:** Submit the solution to an authoring flow where participants review and edit the solution.
- **Author receives confirmation and reviewer begins review process:** Review confirmation that the solution has been submitted to a step within one of the authoring flows. You can review the status of the solution on the confirmation page. For example, if you submit the solution to the initial draft or authoring step in an authoring flow, the status indicates the step that the solution has been submitted to.
- **Is solution ready to be approved?** Verify approval of solution at each step of the authoring flow. Members of the resource groups, who have been assigned to each step in the authoring flow, review and approve solutions.
- **Track publishing of solution:** The resource group who has been assigned to the step before Publishing determine when a solution is ready for publishing.
- **Track rejection of solution:** Solution is rejected and returned to the author for modification. The solution must be saved and submitted again.

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

### **Review Solutions in Progress**

A critical responsibility of a knowledge worker is authoring and reviewing solutions. The following figure shows that tasks that are associated with reviewing a solution.

### Reviewing Solutions in Progress



The tasks to review a solution include:

- **Review Solutions in Progress:** Review the Solutions in Progress tab to see a list of solutions that are currently being authored. Views include **Solutions that I am currently working on**, **Other Solutions that I can lock and update**, and **All solutions in progress**.
- **Determine if this is a solution that you have drafted or locked:** You can view the

solutions that you are currently working on by choosing the **View solutions that I'm currently working on** view from the Solutions in Progress page.

- **Work on my solution:** Modify or update a solution on which you are currently working.
- **Lock and update the solution:** Determine whether you have proper permission and whether you can approve the solution that someone else has authored.
- **Add comments to solution for author or reviewers:** If you cannot lock and update the solution, you can add comments for viewing by other reviewers. These comments are not published.

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

- **Lock and update the solution:** Lock and update the solution for editing. This option locks the solution, so that no other Knowledge Workers can lock and update the solution while you have it checked out.
- **Edit the solution:** Modify the solution. You must have sufficient permission to edit a solution.
- **Save and resume work later:** Save the solution so that you can work on it later.
- **Save and submit the solution to** authoring flow: Save changes and submit the solutions to a step or status in the authoring flow, for example, Publish. This step checks the solution back in so that other Knowledge Workers can lock and update the solution.

The Searches in the Knowledge Base, page 3-23 table summarizes the flow for viewing a Solution in Progress that has not already been published. For solutions that have been published and have subsequently been checked out, the system prompts the user to select an authoring flow after clicking the Save and Submit button rather than selecting a step in the current flow.

- **Change authoring flow:** Determine whether you want to submit the solution to a new authoring flow.

The Knowledge: Select Authoring Flow profile option must be **Yes** for you to have the ability to select an authoring flow. Otherwise, the system submits the solution to the default authoring flow.

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

An updated solution can be rejected and returned to the author by changing the

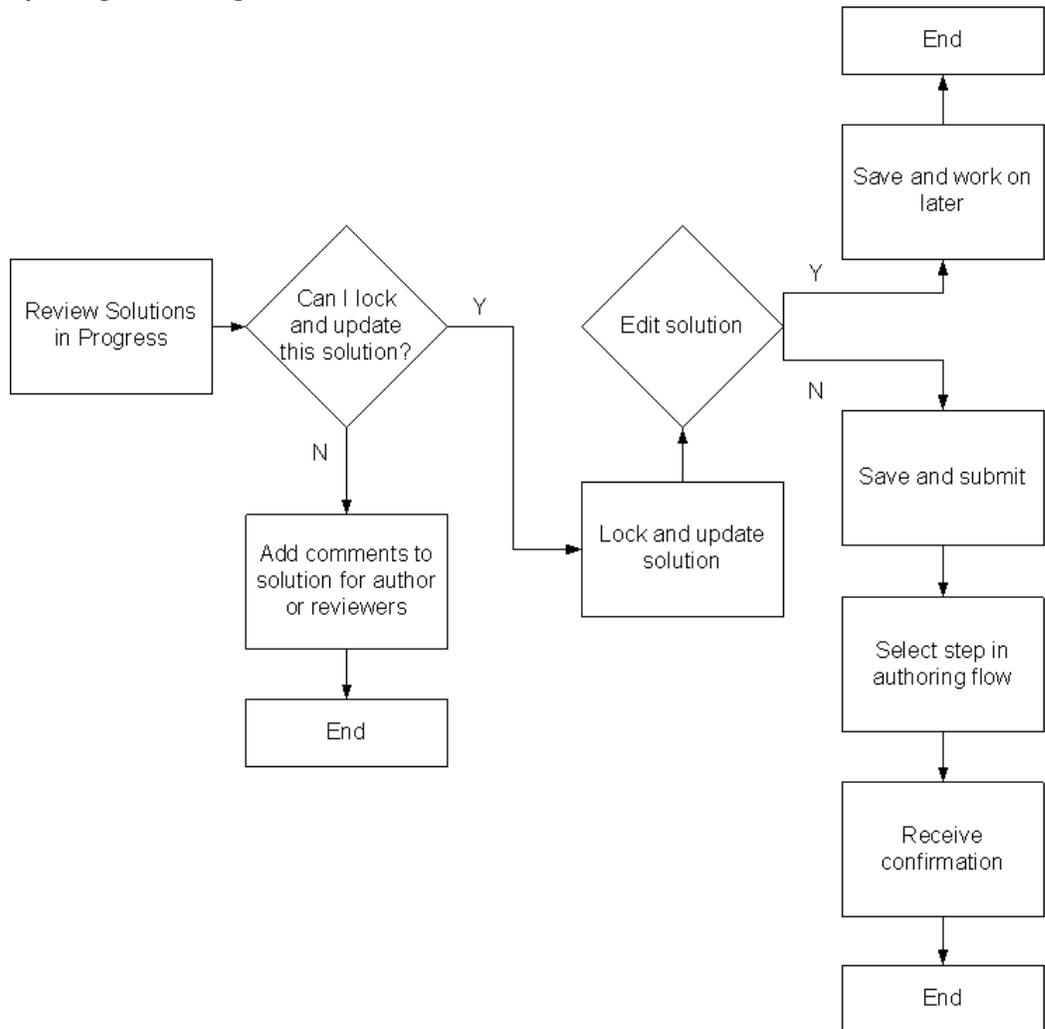
solution to the initial Draft or **Authoring** status.

- **Receive confirmation:** Review confirmation that the solution has been submitted to a step within one of the authoring flows. You can review the status of the solution on this confirmation page.

### **Update a Solution**

Knowledge Workers can also update an existing or published solution. The Updating an Existing Solution, page 3-21 figure shows tasks that you perform to update an existing solution.

### Updating an Existing Solution



Updating an existing solution includes:

- **Reviewing published solutions:** Search for and review a published solution.
- **Determining whether or not you have proper permission:** You need permission to lock and update a solution and edit it.
- **Adding comments to solution for reviewers:** If you cannot lock and update the solution, you can add comments for viewing by other reviewers. These comments are not published.

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

- **Locking a solution:** Determine whether you have proper permission and whether you can approve the solution that someone else has authored.
- **Editing a solution:** Modify the solution.
- **Saving and resuming work later:** Save the solution so that you can work on it later.
- **Saving and submitting solution to authoring flow:** Save changes and submit the solutions to a step or status in the authoring flow, for example, **Publish**. This step checks-in the solution so that other Knowledge Workers can lock and update the solution.
- **Selecting an authoring flow:** Select an authoring flow to submit the edited solution for review.

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

- **Receiving confirmation:** Review confirmation that the solution has been submitted to an authoring flow. You can see which flow to which the solution has been submitted by verifying the status that appears on the confirmation.

### Search the Knowledge Base

Knowledge Workers frequently must search the knowledge base to maintain its relevancy. As part of this process, the Knowledge Worker must determine the search criteria and subject matter and which type of search to conduct. Oracle Knowledge Management offers several ways to search the knowledge base.

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

The following table, page 3-23 shows the types of searches, the usage, and the objectives or results that are available in Oracle Knowledge Management.

### Searches in the Knowledge Base

Search Type	Usage	Objectives or Results
Perform a Simple Search	Knowledge Administrator	Keyword Test
	Knowledge Worker	Published Solutions
	Customer Service Agent	Published Solutions
	End User	Multiple Repositories Service Requests
Perform an Advanced Solution Search	Knowledge Administrator	Related Statements
	End User	Matching Statements
	Knowledge Worker	Ability to Add Filters
	Customer Service Agent	Published Solutions
Search Solutions in Progress	Knowledge Worker	Solutions in Progress
Search for Statements	Knowledge Administrator	Published Statements
	Knowledge Worker	

You can search the knowledge base using different search criteria:

- **Simple Search:** Simple Search lets you enter significant words, known as keywords, to perform a search for solutions across multiple repositories within the knowledge base. By default, Solutions, Categories, and Service Requests are the repositories that are available for search. The keyword search also matches against the names and descriptions of the products and platforms that are tied to the solution, if there are any.

The Simple Search for solutions performs a keyword search of the solution title, solution number, statement summary, and statement description. For categories, a keyword search occurs across the category name. The search does not apply to the whole path of the category.

From the Simple Search page you can also browse solution types. Solution categories are a way to organize the knowledge base. Solution categories let you navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base.

- **Advanced Solution Search:** Advanced Solution Search lets you search for solutions that meet specific user-defined criteria. This is a more comprehensive search that

lets you set conditions and filters and incorporate similar and identical statements into your search. Solutions consist of statements. The Advanced Solution Search allows users to find solutions using statements as the search criteria. The Advanced Solution Search can search similar statements or solutions based on a statement. From a given statement, users can find any other solution that uses this statement.

- **Solutions in Progress:** Solutions in Progress is a search that searches draft solutions or solutions that are not yet published. This search functionality is not available to calling applications directly, although users accessing from calling applications can navigate to this page by choosing from the menu. You can view or search solutions in progress from the Solutions in Progress page. In addition to solutions that have not been approved for publishing, Solutions In Progress includes saved solutions that have not been submitted for approval.
- **Statement Search:** By searching for a statement, you can find the related solutions containing that statement. Typically, only knowledge workers and knowledge administrators use this process. This process is a useful way to find statements using statement numbers. The knowledge administrator can use this search to find a statement 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 Advanced Solution Search page rather than using the Search Statements page.

### Create Top Solutions for Oracle iSupport Users

Knowledge workers can designate certain solutions as **Recommended**. Recommended solutions are a list of particularly worthy or desirable solutions for users to view. For example, solutions that are on this list may include fixes for a recently discovered product problem. Users who navigate to the Top Solutions tab in Oracle iSupport can view a listing of recommended solutions as well as a list of frequently used solutions. Frequently Used Solutions is a separate list of solutions based on usage counts.

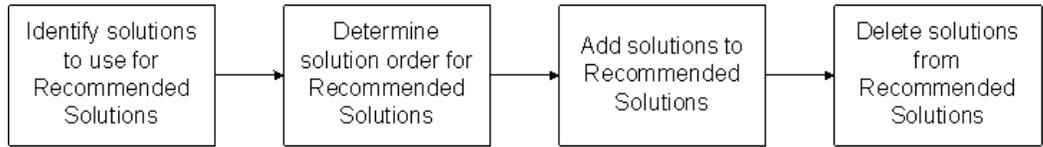
#### Top Solutions: Recommended Solutions List

The Recommended Solutions list shows solutions that the knowledge worker chose to show in Oracle iSupport.

**Note:** A knowledge worker often adds recommended solutions.

The following figure and the following list show or describe the tasks that a knowledge worker performs to manage the lists on the Top Solutions tab.

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



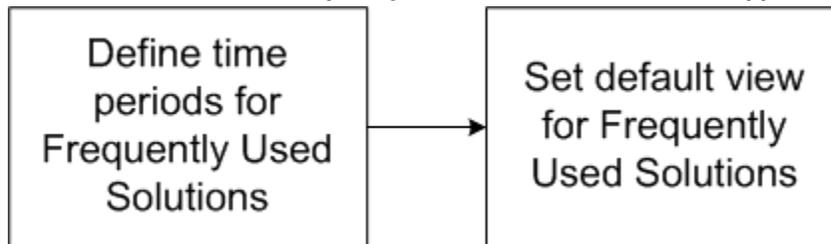
- **Identify solutions to use for Recommended Solutions list:** Identify how many and which solutions to include on the Recommended Solutions list. This can involve working with Knowledge Workers to determine the solutions that are most useful to users.
- **Determine solution order for Recommended Solutions list:** Determine the sequence in which the solutions appear in Oracle iSupport.
- **Add solutions to the Recommended Solutions list:** Add the solutions to the Recommended Solutions lists. You set up the list Oracle Knowledge Management. The list appears in Oracle iSupport.
- **Delete Solutions from the Recommended Solutions list:** Delete solutions as part of an ongoing maintenance of the Recommended Solutions list.

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

The Frequently Used Solutions list is based on usage counts. You can change the view for these counts by specifying a new date range from a list. You specify and create these date ranges or definitions in Oracle Knowledge Management. In addition, you specify the default view or date range in Oracle Knowledge Management.

The following figure is a flow diagram that shows the sequence of creating definitions for Frequently Used Solutions for Oracle iSupport users.

### ***Define Time Periods for Frequently Used Solutions for Oracle iSupport***



Creating definitions for Frequently Used Solutions for Oracle iSupport Users includes:

- **Defining time periods for Frequently Used Solutions:** Specify date ranges, such as **within the last year**, that appear in the Frequently Used Solutions list. This list controls the date range of the frequently used solutions.

- **Setting the default view for Frequently Used Solutions:** Specify the date range or definition that you would like to use as the default view for the Frequently Used Solutions list.

## Implementation Tasks

The following table, page 3-26 shows the setup steps that you must complete to implement Oracle Knowledge Management. These steps are in addition to Installation and Dependency Verification, page 2-5.

### *Implementation Tasks*

<b>Task</b>	<b>Reference</b>	<b>Mandatory or Optional</b>	<b>Setup</b>
Prerequisites or Implement Mandatory Dependencies	Before You Begin, page 2-1	Mandatory	Forms
Create Users and Resource Groups	Create Users and Resource Groups, page 4-1	Mandatory	Forms
Set Up Repositories	Set Up Repositories, page 4-5	Optional	Oracle Knowledge Management
Set Up Security	Set Up Security, page 4-6	Mandatory	Oracle Knowledge Management
Set Up Knowledge Base Structure	Set Up the Knowledge Base Structure, page 4-8	Mandatory	Oracle Knowledge Management
Set Up Authoring Flows	Set Up Authoring Flows, page 4-3	Mandatory	Oracle Knowledge Management
Set Profile Options	Set Profile Options, page 4-10	Optional	Forms
Set Up Autolinks	Set Up Autolinks, page 4-9	Optional	Oracle Knowledge Management

<b>Task</b>	<b>Reference</b>	<b>Mandatory or Optional</b>	<b>Setup</b>
Additional Steps	Additional Integration Setups, page 8-10	Optional	Forms or Oracle Knowledge Management
Import Solutions	Import Solutions, page 4-10	Optional	Forms
Set Up Top Solutions for Oracle iSupport Users	Set Up Top Solutions for Oracle iSupport Users, page 4-11	Optional <b>Note:</b> You must have either added or imported solutions into the knowledge base to perform this setup.	Oracle Knowledge Management



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## Implementation Tasks

This chapter covers the following topics:

- About this Chapter
- Prerequisites and Mandatory Dependencies
- Create Users and Resource Groups
- Set Up Authoring Flows
- Set Up Repositories
- Set Up Security
- Set Up the Knowledge Base Structure
- Set Up Autolinks
- Set Profile Options
- Import Solutions
- Set Up Top Solutions for Oracle iSupport Users
- Performance Considerations

### About this Chapter

This chapter includes the required implementation tasks to set up Oracle Knowledge Management.

### Prerequisites and Mandatory Dependencies

For a list of prerequisite and mandatory dependencies see Before You Begin, page 2-1.

### Create Users and Resource Groups

The System Administrator creates users for Oracle Knowledge Management, including

the Knowledge Administrator. Subsequently, the Knowledge Administrator must create resource groups which are required for automating the authoring flow life cycle. To create a resource group you must:

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

Following are details on how to create a Knowledge Administrator and how to create a resource group:

- Create a Knowledge Administrator, page 4-2
- Create a Resource Group, page 4-4

## Create a Knowledge Administrator

The System Administrator assigns the Knowledge Administrator responsibility--CS\_KB\_SYS\_ADMIN--to a user who performs setups and maintenance for Oracle Knowledge Management.

The System Administrator should also assign the CS\_SYSTEM\_ADMIN role to the Knowledge Administrator user.

### Login

Oracle Forms module

### Responsibility

System Administrator

### Prerequisites

None

### Navigation

Security > User > Define...Users form

### Steps

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

**Example:** KMADMIN

2. To associate the user with an employee:

1. Click the **Person** field to display the **Person Names** list.

2. Search for and choose the appropriate employee.
3. To create a password for the new user:
  1. In the **Password** field, enter a password for the new user.
  2. Use the **Tab** key to clear the field and re-enter the same password to validate.
4. In the **Responsibilities** area, search for and choose the Knowledge Administrator responsibility.
5. **Save** your work.

## Set Up Authoring Flows

To automate the solution authoring process, you must set up authoring flows in Oracle Knowledge Management. Each authoring flow consists of a series of steps that a member of an assigned resource group must complete before publishing a solution.

**Note:** You must associate the authoring flow to a Category Security Group before you can use the authoring flows.

### *Example: Authoring Flow Example*

A health and fitness equipment manufacturer company creates an authoring flow that requires all solutions in the knowledge base to have an editorial review and marketing approval prior to publication. In addition, the company would like to ensure that the legal review team has final authority on publication of a solution. To ensure that the proper controls are in place, the company sets up steps in the authoring flow and associates a unique resource group to each step. The following table, page 4-3 shows the steps and assigned resource groups.

### **Authoring Flow Example**

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

## Create a Resource Group

To automate the solution authoring process, you must set up authoring flows in Oracle Knowledge Management. Each authoring flow consists of a series of steps that a member of an assigned resource group must complete before publishing of a solution can occur. A resource group can include one or more users. To create a resource group, you must first create a user, associate that user with an employee, and create a resource for an employee.

### *Example: Resource Group Example*

A software company creates an authoring flow that requires all solutions to have a technical review and an editorial review prior to publication. To ensure that the proper controls are in place, the company sets up the following resource groups:

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

The following procedures describe how to create a resource for an employee or party.

### **Login**

Oracle Applications Forms

### **Responsibility**

System Administrator

### **Prerequisites**

None

### **Navigation**

Responsibilities window

### **Steps**

1. Switch the Responsibility to the CRM Resource Manager.
2. Navigate to Maintain Resources > Import Resources.  
The Selection Criterion window opens.
3. In the Resource Category field, choose an employee from the list.
4. Enter the employee name or employee number to narrow search criteria.
5. Click Search.

The Search Results section shows the matching results.

6. Click Create Resource.

The Default Values window opens.

7. Enter mandatory and other information and click OK.

The Selected Resources window appears.

8. Click Save Resource.

9. To create a resource group:

1. Switch the Responsibility to the CRM Resource Manager Responsibility.
2. Navigate to Maintain Resources > Groups. The Define Groups window opens.

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

3. Enter the group name.

4. On the Members tab, enter the names of the employees that you want in the group.

5. Navigate to the Usages tab and click Oracle iSupport.

6. Save the record.

**Note:** You can set up employee resources and resource groups in HTML. For information on creating employee resources and resource groups in HTML, see the *Oracle Common Application Calendar Implementation Guide*.

## Set Up Repositories

With Oracle Knowledge Management, administrators can define new repositories for the searching of knowledge. These repositories can be either of type Custom or Oracle Secure Enterprise Search (SES). The following sections of the current book guide you through setting up repositories:

1. If you want to set up repositories for a service provider, then refer to Manage Repositories, page 13-1 and Map Contexts to Repositories, page 13-2.

2. If you want to set up repositories for a service requestor, such as a user from Oracle iSupport, then refer to *Define a Simple Search Repository for a Service Requestor*, page 5-12.

## Set Up Security

The following sections guide you through setting up Security:

- Define Visibility, page 4-6
- Define Categories, page 4-7
- Define Category Security Groups, page 4-7
- Associate Categories with Category Security Groups, page 4-7
- Associate Authoring Flows with Category Security Groups, page 4-8

## Define Visibility

The sensitivity or visibility of categories, solutions, and statements is a factor that determines whether or not a particular user can access a category, solution, and statement. The **visibility level** is a reflection of the confidentiality or sensitivity of the category, solution, and statement.

Visibilities:

- Restrict certain users from viewing secure or sensitive information.
- Control the level of access a user has to a category, a solution, or a particular statement within a solution.

You define visibilities on a linear scale, from the most sensitive--such as highly secure or Internal--to the least sensitive--such as low security or External. Visibility levels for categories and solutions are extensible. You should plan and define visibility levels at implementation time. For statements, visibility levels are limited to Internal and External. Users assign visibility levels to data--such as categories, solutions, and statements--when they create the data.

Users are assigned a visibility level through a **mandatory** profile option, **Knowledge: Assigned Visibility Level**. A user who has a particular visibility level has access to all data that has that same or less secure level. You can set the profile option at the Site, Application, or Responsibility levels. The **Knowledge: Assigned Visibility Level** profile option is seeded at the:

- **Application level** for seeded applications that integrate with Oracle Knowledge Management.

- **Responsibility level** for the seeded Oracle Knowledge Management responsibilities.

**Note:** It is a **requirement** to assign a value for the **Knowledge: Assigned Visibility Level** profile at implementation time for any custom applications or responsibilities that are defined that use Oracle Knowledge Management. For more information on the seeded values, see *Seeded Visibility Levels*, page 14-4.

## Define Categories

Categorization of solutions is the process of grouping solutions together for browsing or for performing a category-specific search for solutions. You organize solutions into categories for convenient management. 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 you limit their number.

For some examples of Solution Categories, see *Solution Categories*, page 4-9.

## Define Category Security Groups

Category Security Groups are defined views of categories that determine whether or not a particular user can access a category, solution, and statement. Category Security Groups are subsets of the master category hierarchy and represent subject areas. After you define the master category hierarchy, you must also define the views--the Category Security Groups--of the master category hierarchy.

By default, there is a single defined seeded Category Security Group. Users have access to the content within a Category Security Group through the **Knowledge: Assigned Category Security Group** profile option. You can set the profile at the Site, Application or Responsibility level. The profile option is seeded at the site level with the single default security group.

## Associate Categories with Category Security Groups

When you add a new category, you must associate the category with one of the Category Security Groups before anyone can use the category. This requirement applies even if a user does not want to define extra security settings if the user has defined new categories at the top level, under Home. At the very least, you can associate the newly added category to a default Category Security Group. If you create a category beneath another category, and the parent category is already associated with a category group, then you do not need to associate the new category with a category group. It inherits the category group association from the parent.

## Associate Authoring Flows with Category Security Groups

Before you can use any of the user-defined authoring flows, you must assign the flow to a category security group. This requirement applies even if a user does not want to define extra security settings. At the very least, you can associate all defined authoring flows to a default category security group.

For more information, see *Set Up Authoring Flows*, page 4-3.

## Set Up the Knowledge Base Structure

To effectively manage Oracle Knowledge Management, it is critical to spend some time designing the structure of the knowledge base. Oracle Knowledge Management lets you set up structures that help organize and partition information in the knowledge base. Creating a knowledge base structure that is either overly complex or simple minimizes the effectiveness of the knowledge base.

The knowledge base consists of a series of solutions that contain statements that help solve problems. To organize how to create and identify solutions, Oracle Knowledge Management requires that all statements be associated to a Solution Type and all solutions be associated to a Statement Type. Each Solution Type must have at least one Statement Type associated to it. In addition, Oracle Knowledge Management provides the ability to create Solution Category folders to help organize the knowledge base.

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

Following are descriptions of Statement Types, page 4-8, Solution Types, page 4-9, and Solution Categories, page 4-9.

### Statement Types

The most granular level of information in the knowledge base is a statement. Statements are the main source of information within the solution. Each statement belongs to a statement type that helps identify the type of information that the statement contains. For example, Action is a statement type--a statement that directs the user to do a particular task to solve an issue.

*Example: Statement Type Example*

**Statement Type:** Action

**Action Statement:** Replace ink cartridge in printer

## Solution Types

Similarly, solutions belong to Solution Types that classify the solution. The Solution Type identifies the mandatory Solution Types that the solution contains. The default Solution Type is the **Symptom-Cause-Action**, which by definition contains at least one Symptom statement, one Cause statement, and one Action statement.

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

### *Example: Solution Type Example*

**Solution Type:** Symptom or Cause or Action

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

## Solution Categories

After a user creates a solution, the user can put the solution into a Solution Category folder that contains a set of related solutions. For example, a solution that covers replacing a printer ink cartridge might be in a Solution Category folder called Printers, which contains similar solutions.

### *Example: Solution Category Example*

**Solution Category:** Printers

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

## Set Up Autolinks

Setting up autolinks lets you define parsing rules and destinations for hyperlinking key words in the Statement Details area.

Topics that describe how to set up autolinks include:

- Create or Update Autolinks, page 15-1
- Remap Autolinks for Agent Pages, page 15-2

## Implementation Prerequisites and Considerations

Notes: Setup Prerequisites

Before setup, consider the followings:

- Do any well-known documents exist to which you would like to have a hyperlink created automatically when they are viewed?
- Does your company have any well-known systems to which you would like to have quick access?
- After noting the answers to the questions above, decide if custom functions are needed to support an autolink. Functions must be created before an autolink can be set up if the autolink involves the use of a function.

Notes: Implementation Considerations

Before implementing this feature, consider the following:

- Autolink is a mechanism that provides a hyperlink to a destination for a given keyword pattern. It allows links be generated without "hard-coding" the link inside the solution content. This allows much simpler administration when the link destination is changed.
- Autolink usage is not intended for security purposes. A hyperlink is rendered whenever the solution is shown. Do not rely on the autolink usage as a mechanism to secure content. An autolink destination is expected to control the accessibility of content.

## Set Profile Options

A critical component of implementing Oracle Knowledge Management is setting the profile options.

Within all Oracle applications or modules, there are seeded profile options. Each module has its own specific set of profile options. Although all profile options are seeded, the system administrator must specify some settings.

## Profile Options for Oracle Knowledge Management

For a listing of all Oracle Knowledge Management profile options, their descriptions, and how to set them up, see Profile Options, page B-1.

## Import Solutions

The Oracle Knowledge Management Solution Import Program loads solutions into

Oracle Knowledge Management. For a complete description of the Oracle Knowledge Management Solution Import Program, see Concurrent Programs, page D-1. Sample File For Solution Import Program, page E-1 contains a sample file for the Solution Import Program.

## Set Up Top Solutions for Oracle iSupport Users

In Oracle iSupport, you can navigate to the Top Solutions tab to view a list of Frequently Used Solutions and a list of Recommended Solutions.

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

Both Oracle Knowledge Management usage counts and date definition setup are the basis for populating the **Frequently Used Solutions**.

**Recommended Solutions** is a listing of solutions that a Knowledge Administrator or a Knowledge Worker chose and set up in Oracle Knowledge Management.

## Performance Considerations

Some issues to consider about performance include:

- Make Changes to Security Setup, page 4-11
- Using Parallel Workers, page 4-11

## Make Changes to Security Setup

When you make changes to the security setup, this may cause many solutions in Oracle Knowledge Management to be marked for text re-indexing. When many solutions are pending for re-indexing, the subsequent index synchronization requires more time to complete.

Examples of security setup changes include:

- Adding or removing a visibility level
- Adding or removing a large category--that contains many subcategories and solutions--to or from a category security group
- Moving categories around

## Using Parallel Workers

To significantly reduce the amount of time to rebuild the Oracle Knowledge

Management Text indexes, use parallel workers. Each index synchronization program includes the **Number of workers** parameter. The **Number of workers** parameter is number of processes that can run at the same time when creating the Oracle Text indexes such as a solution index and a statement index.

A disadvantage of the parallel mode for building indexes is that neither search nor authoring of new solutions can happen while the index is building.

**Note:** The Number of workers parameter applies only to the **drop and recreate (DR) mode**. The **DR mode** is available in the index synchronization programs. When you use this mode, Oracle Knowledge Management drops the text index and recreates it from scratch.

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## Customizations and Extensions

This chapter covers the following topics:

- About this Chapter
- Customize with Personalization
- Define Simple Search Repositories

### About this Chapter

This chapter includes customization and extension tasks to set up Oracle Knowledge Management.

### Customize with Personalization

The OA framework provides personalization functionality to the agent user interface. Personalization allows easy configuration of pages to match the business needs of different customers.

The following are examples of OA framework personalization:

- If you want to hide the Platform field from Oracle Knowledge Management, you need to hide the corresponding Platform region on the pages that show it, including the View Solution page, Advanced Solution Search Criteria page, and the Update Solution page.
- Similarly, you can hide or show the **Using** search option and the Search Related Solution button on Advanced Solution Search page.

In addition to the preceding examples, the OA framework provides flexibility in customization, such as:

- Hiding or showing of items and regions.

**Note:** By default, the following are hidden fields: **Solution Type** and **Using** on the Advanced Solution Search Criteria page, **Usage** column in the Solution Result table on the Advanced Solution Search Result page. You can turn on these fields through personalization.

- Reordering of items and regions.
- Renaming of buttons, prompts, and column headers.

For example, you can:

- Hide score columns from search results.
- Hide Solution Type and Visibility lists, items, platform, external links, and task template regions to simplify create solution.

### **Important Notes on Personalization**

Following are important notes about using Personalization with Oracle Knowledge Management.

- Refrain from hiding required items that do not have a default value. Also, you should not hide functionally required items. For example, hiding the Go button or Search button on Search page does not make sense.
- Do not overwrite the Controller class.
- Do not change the displayed number of records of table if the table is set to display 200 records. The intention of displaying such tables is to show all data at one time.

### **Restrictions on Personalization**

The following is a list of restrictions for using personalization.

- You cannot hide or modify the page title of the Solution Details page and the Statement Details page.
- You cannot disable the link on the category bin of the Solution Details page.
- The configuration of the Simple Search result layout uses a different mechanism than personalization. For more information, see Define Simple Search Repositories, page 5-3.

### **Configure with Function Instead of Personalization**

You must configure the following items using function instead of personalization since they are security related:

- Update, Edit, and Get Lock buttons on Solution Details page.
- Advanced Search button.
- Create Solution button.

For more information, see *Access Control*, page 3-1.

### **Personalize Attachments**

The following are notes for personalizing attachments:

- If you enable **Enable Document Catalog** for the attachment table, be aware that other users may be able to search for the attachments. You should verify the attachment category settings to ensure enforcement of security.
- If you want to have different categories for your attachments, then you should personalize for the following pages: Create Solution, View Solution, Preview Solution, and Read-only View Solution to add the categories to the attachment table. Unless you do this consistently, you will not see the attachment added to a category, which is not in the attachment table for some other page.

### **Personalize by Setting FND: Personalization Region Link Enabled**

You can personalize the following items by setting **FND: Personalization Region Link Enabled**:

- Search criteria sandbox on Simple Search.
- Simple Search Result subordinate tab areas.
- Notification page.

### **Personalization Resources**

For more information on personalization, see *Oracle Applications Framework Personalization Guide*.

## **Define Simple Search Repositories**

Main topics that help you manage simple searches include:

- Create a Simple Search Custom Repository for a Service Provider, page 5-4
- Define a Simple Search Custom Repository for a Service Provider, page 5-6
- Create a Simple Search Repository for a Service Requestor, page 5-7
- Define a Simple Search Repository for a Service Requestor, page 5-12

## Create a Simple Search Custom Repository for a Service Provider

You can create new Simple Search custom repositories for service providers. If you want to create Simple Search repositories for service requestors, see [Create a Simple Search Repository for a Service Requestor](#), page 5-7.

**Note:** The steps within this section are optional.

The following topics describe how to create new Simple Search custom repositories for service providers:

- [Create a New View Object to Perform Search](#), page 5-4
- [Create a New View Object to Perform the Count Query](#), page 5-5
- [Create a New JRAD Region](#), page 5-6
- [Create a New Controller Object for Your Region](#), page 5-6

### Create a New View Object to Perform Search

The following procedures describe how to create a new View Object to perform searches.

#### Steps

1. Create a new View Object (**VO.xml**) that includes the query to retrieve results from your new repository.
2. Create a new View Object implementation (**VOImpl.java**) that extends **oracle.apps.cs.knowledge.solution.search.server.RepositoryStandard**.

Example: **UnifiedSearchSolutionsVOImpl.java**

3. Implement the **setParameter(HashMap)** method of the **VOImpl**.

You should set all the mandatory parameters in your query in this method.

The HashMap stores the following search criteria:

- **KMSearchConstants.SEARCH\_METHOD** is the key for search method
- **KMSearchConstants.SEARCH\_KEYWORD** is the key for key word
- **KMSearchConstants.PRODUCT\_ID** is the key for inventory item ID
- **KMSearchConstants.PRODUCT\_ORG\_ID** is the key for inventory item organization ID.

- **KMSearchConstants.CATEGORY\_ID** is the key for the current Solution Category ID.
4. Override **executeQuery()** if you want to customize the behavior of your VO before or after the query execution.  
You need to invoke **super.executeQuery()** in your method.
  5. Place **VO.xml** in the package under in **\$APPL\_TOP/java**.
  6. Compile **VOImpl.java** and place the **.class** in the package under **\$APPL\_TOP/java**.

### Create a New View Object to Perform the Count Query

The following procedures describe how to create a new View Object (VO) to perform the count query. This VO gets the total number of records that match the search criteria.

#### Steps

1. Create a new View Object (**CountVO.xml**) that includes the query to retrieve the results count from your new repository.
2. Create a new View Object implementation (**CountVOImpl.java**) that extends **oracle.apps.cs.knowledge.solution.search.server.RepositoryStandard**.

Example: **CountUnifiedSearchSolutionsVOImpl.java**

3. Implement the **setParameter(HashMap)** method of **CountVOImpl**.

You should set all the mandatory parameters in your query in this method.

The HashMap stores the following search criteria:

- **KMSearchConstants.SEARCH\_METHOD** is the key for search method.
  - **KMSearchConstants.SEARCH\_KEYWORD** is the key for key word.
  - **KMSearchConstants.PRODUCT\_ID** is the key for inventory item ID.
  - **KMSearchConstants.PRODUCT\_ORG\_ID** is the key for inventory item organization ID.
  - **KMSearchConstants.CATEGORY\_ID** is the key for the current Solution Category ID.
4. Override **executeQuery()** if you want to customize the behavior of your VO before or after the query execution.  
You need to invoke **super.executeQuery()** in your method.
  5. Place **CountVO.xml** in the package under in **\$APPL\_TOP/java**.

6. Compile **CountVOImpl.java** and place the **.class** in the package under **\$APPL\_TOP/java**.

### Create a New JRAD Region

The following procedures describe how to create a new JRAD region.

#### Steps

1. Create a new JRAD region in its own XML file.  
Example: **SolutionResultRN.xml**  
The style of the region should be **defaultSingleColumn**.
2. The UI components can reference the corresponding search VO.  
Example: **UnifiedSearchSolutionsVO**
3. Import the JRAD region into the database using XMLImporter.

### Create a New Controller Object for Your Region

The following procedures describe how to create a new controller object for your region.

#### Steps

The Controller code (CO.java) can reference the corresponding search VO, for example, **UnifiedSearchSolutionsVO**.

1. Add logic to the **processRequest()** method to programmatically control the UI components of your region.
2. Add logic to the **processFormRequest()** method to process event from your region.
3. Compile **CO.java** and place the **.class** in the package under **\$APPL\_TOP/java**.

To add or remove service provider's Simple Search repositories, see **Define a Simple Search Custom Repository for a Service Provider**, page 5-6.

### Define a Simple Search Custom Repository for a Service Provider

You can add or remove service provider repositories for use in Oracle Knowledge Management.

To define the repository, use the same steps that are presented in the **Implementation Tasks** chapter:

1. **Manage Repositories**, page 13-1
2. **Map Contexts to Repositories**, page 13-2

## Create a Simple Search Repository for a Service Requestor

You can create new Simple Search repositories for service requestors. If you want to create Simple Search repositories for service providers, see [Create a Simple Search Repository for a Service Provider](#), page 5-4.

**Note:** The steps within this section are optional.

Topics in this section include:

- [Terminology](#), page 5-7
- [API's](#), page 5-8
- [Develop the Search Service](#), page 5-10
- [Register the Category](#), page 5-11
- [Register the Search Service](#), page 5-11

### Terminology

Terminology includes:

- [SearchKeySet](#), page 5-7
- [SearchItem](#), page 5-7
- [SearchResult](#), page 5-8
- [SearchService](#), page 5-8
- [SearchManager](#), page 5-8

#### SearchKeySet

The **SearchKeySet** class represents the search queries. A search query specifies one or more search keys along with following optional qualifiers:

- The plus sign (+) represents a required search key.
- The negative sign (-) represents a search key to exclude.

A search string without any qualifier represents an optional key.

For example, **key1 +key2 -key3** is a query, where **key1** is optional, **key2** is required, and **key3** should be excluded.

An instance **SearchKeySet** contains parsed information for each type of search key.

#### SearchItem

**SearchItem** is an interface for any display program to display search results from various engines in a uniform fashion. Individual applications must implement this interface and can extend it for more advanced usage.

### **SearchResult**

**SearchResult** is the class that represents the search results. It contains a vector of SearchItems, page 5-7. A search runs in batches. An instance of SearchResult represents one batch. It also contains information about the total size of the search result, the starting index, the search factory used to do the search and the search result heading, and any hints for searching.

### **SearchService**

**SearchService** is an abstract class that serves as the super class for all search service implementations. It is a template for developers to write search engines to fit in the Search Management mechanism, namely to work with the SearchManager, page 5-8. The SearchService runs in a separate thread. This class provides APIs for finding when to stop the search and to make the search results accessible to the SearchManager.

### **SearchManager**

**SearchManager** is the core class that hooks up all of the preceding pieces together and performs the search operation. SearchManager provides the method for searching for a key in a given category. SearchManager also provides APIs for finding out all the categories from the application configuration and interfacing with FND\_Lookup tables for registering new categories and retrieving them. Each category has a key, which the system uses for searching, and a corresponding value, which the system uses for display purposes.

## **APIs**

**SearchItem Interface:** `public interface oracle.apps.jtf.search.SearchItem`

`public int getPercentMatch();`

Returns a number greater than zero and at most 100. This number represents the confidence level of the match.

`public String getTitle();`

Returns the name of the matching object to display.

`public String getDescription();`

Returns a short description of the matching object. This method is optional. Its result does not appear by default.

`public String getLink();`

Returns the hyperlink to access the matching object.

`public Hashtable getCustomAttribVals();`

Note that the SearchItem can hold application specific search item information as name value pairs in a hash table. Using this mechanism, each application can pass back

custom information as part of the search result.

**SearchService Class: public abstract class oracle.apps.jtf.search.SearchService**

**public abstract void search(String category, SearchKeySet query, int limit, int start, int batchSize, Hashtable extraSearchParams)**

Searches and uses insert, setTotal, and setHint methods to send results to the calling thread.

Parameters:

- **category:** The category key that the user chose. This is the key used in FND\_LOOKUPS.
- **query:** The query string that conforms to standard search engine syntax.
- **limit:** The maximum number of objects to retrieve. The value **-1** denotes no limit.
- **start:** The zero-based index of the first item to retrieve. This value must be at least zero.
- **batchSize:** The number of items to retrieve for display. This value must be greater than zero. The specification of limit, start, and batchSize allows the SearchManager to access cached results by the search engine, if caching is implemented.

**protected final void insert(SearchItem s);**

For each matched item found, the search service needs to create an instance of SearchItem and uses this method to make it accessible to the SearchManager.

**public abstract String getName();**

Returns the name to be published in the Searchable object directory. Each service implementation needs to implement this method.

**public abstract String getUsage();**

Returns usage info, such as special parameters. Each service implementation needs to implement this method.

**SearchManager Class: public abstract class oracle.apps.jtf.search.SearchManager**

**public static Hashtable search(String category, String query, int start, int limit, Hashtable extraSearchParams);**

Performs the following tasks:

- For a given query string, the API parses a given query string to create an instance of SearchKeySet.
- It finds out which search factory corresponds to the given category and creates an instance of the corresponding service.

- It invokes the service instance **search** (as explained above) in a separate thread. The parameter **batchSize** is obtained from the application configuration property **search.service.batchsize**. The time-out value for each search thread is obtained from the property **search.service.timeout** (in ms).
- It returns the search result in a hash table. The hash table contains the service name and corresponding instance of **SearchResult**. The instance of **SearchResult** itself has a vector of **SearchItems** on which the search service implementation invoked the **insert** method. For additional information, see **SearchService**, page 5-8.
- If the category is **SearchManager.ALL\_ENGINES**, then the search manager invokes search on the search factories specified in application configuration.

### Develop the Search Service

You must write the search service factory and the corresponding search service implementation. Each service factory corresponds to one or more search categories. The search service factory can be a standard class, such as the sample search factories in **oracle.apps.jtf.devtest.services.SimpleSearchFactory**. The difference is the creation of the service instance. The service implementation class must inherit from **SearchService**. It must implement the search method as described above under **SearchService**. For each matched item found, the search service needs to create an instance of **SearchItem** and use the **insert** method of the superclass to make it available to the **SearchManager**. Additionally, each service must implement the following, which are described further above:

- **public abstract String getName();**
- **public abstract String getUsage();**

The search service also must set the total number of items returned and the search result heading used for display purposes. Do this using the following methods of its superclass:

- **protected final void setTotal(int total)**
- **public final void setResultHeading(String heading)**

You can look at **oracle.apps.jtf.devtest.services.SimpleSearch** for sample search service implementation. Note that a service runs in a new thread. It shares its session with the main thread. Therefore, the restrictions of spanning a new thread applies to the search thread. For example, you cannot use the transaction service within the new service. To get a database connection, use **oracle.apps.jtf.aom.transaction.TransactionScope.getNewConnection()** rather than **oracle.apps.jtf.aom.transaction.TransactionScope.getConnection()**. Note that **oracle.apps.jtf.search.SearchService** provides the method **protected final boolean timeToStop()**, which you can use in the service implementation to find out whether the time that the **SearchManager** provided for service execution has expired.

## Register the Category

You must register each search category in the **FND\_Lookup** tables. Register them under the category **IBU\_SEARCH\_CATEGORIES**. SearchManager provides API's for registering a new category with FND tables. Each category consists of a category code (a parameter to the search service implementation that you use in application configuration) and the corresponding value (used for display purposes only).

### Login

Oracle Applications Forms.

### Responsibility

Application Developer

### Prerequisites

Develop the Search Service, page 5-10

### Navigation

Application Developer > Application Object Library

## Register the Search Service

All the search service factories for current application are registered with the property **search.factories**. The definition for this property is:

```
search.factories = <factory1 class name >;<factory2 class name>; ...
```

For example:

```
search.factories =  
oracle.apps.jtf.devtest.services.ComplexSearchFactory;oracle.apps.jtf.devtest.services.  
SimpleSearchFactory
```

For each search factory, you must provide the following entries:

- **<factory class name>.desc = <factory descriptor>**  
// **factory descriptor** can be string, which is used to  
// obtain the instance of the search service from the service manager, if needed
- **<factory class name>.categories = <cat fnd code1>;<cat fnd code 2>;...**  
where **<cat fnd code>** are the category codes as registered above.

For example:

- **service.oracle.apps.jtf.devtest.services.SimpleSearchFactory.desc = SimpleSearch.item**
- **service.oracle.apps.jtf.devtest.services.SimpleSearchFactory.categories = bar;newbar**

**Login**

System Administrator Console within the CRM Technology Foundation

**Responsibility**

CRM HTML Administration

**Prerequisites**

Register the Category, page 5-11

**Navigation**

Settings > System > Properties > Advanced

**See Also**

To add or remove Simple Search repositories for service requestors, see Define a Simple Search Repository for a Service Requestor, page 5-12.

## Define a Simple Search Repository for a Service Requestor

You can add or remove repositories for service requestors for use in Oracle Knowledge Management.

**Note:** Before you can add a repository, verify that you have created a Simple Search repository for service requestors. For more information on creating service requestor repositories, see Create a Simple Search Repository for a Service Requestor, page 5-12.

Simple Search for a service requestor--also known as Basic Search--is built on the CRM Technology Foundation (JTF) technology stack.

Topics in this section include:

- Include a New Simple Search Repository for a Service Requestor, page 5-12
- Remove a Seeded Repository from the Simple Search, page 5-13

### Include a New Simple Search Repository for a Service Requestor

**Login**

JTF application

**Responsibility**

CRM HTML Administration

**Navigation**

System > Properties > Advanced

**Steps**

1. Choose the application IBU in the View LOV.
2. Find the search.factories key.
3. Add the following entry:  
Sequence Value  
<next seq> oracle.apps.cs.knowledge.oes.OesSearchFactory
4. Set the SES properties for the following:  
EndPoint=  
ProxyHost=  
ProxyPort=  
DataGroups=
5. In order for Knowledge Management search framework to pick up the SES repository during search, add the SES repository to the "Knowledge: Repositories to search across in simple search" profile at the iSupport application level (or responsibility level).  
  
For example, if the profile value was originally SOLUTIONS,SOLUTION CATEGORIES,LIBRARY, then change this to: SOLUTIONS,SOLUTION CATEGORIES,LIBRARY,OES
6. Login to iSupport, navigate to the Support Tab, and perform a search. The SES repository should appear.

#### **Remove a Seeded Repository from the Simple Search**

The following procedures describe how to remove a seeded repository from the Simple Search.

#### **Login**

Oracle Applications Forms

#### **Responsibility**

System Administrator

#### **Prerequisites**

None

#### **Navigation**

Profile > System...Find System Profile Values window

#### **Steps**

1. Look up the profile option **Knowledge: Repositories to search across in simple**

**search** and remove the category of the repository at the appropriate level: Site, Application, Responsibility, or User.

For more information on profile options, see Set Up Profile Options, page B-3.

**Note:** The category of the new repository is the value of the JTT property **service.<classpath>.categories** that you created when setting up the JTT QuickFind repository.

2. Bounce the Web server.

# Part 3

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## Post Implementation Tasks

This part contains the following chapters:

- Verifying Implementation, page 6-1
- Diagnostics and Troubleshooting, page 7-1



---

## Verifying Implementation

This chapter covers the following topics:

- Verification of Implementation
- Verify Setups
- Verify Knowledge Authoring
- Verify Knowledge Search

### Verification of Implementation

The following sections guide you through verification of correctly implementing Oracle Knowledge Management:

- Verify Setups, page 6-1
- Verify Knowledge Authoring, page 6-2
- Verify Knowledge Search, page 6-3

### Verify Setups

The following procedures summarize how to verify setups.

#### Steps

1. Verify that you have created the required Users for your implementation.
2. Verify that you have created one or more resource groups (which is required for creating authoring flows).
3. Verify your Authoring Flow Setup:
  - Create, view and update an authoring flow. This includes associating the Steps

to the Authoring Flow, which are associated to the resource groups already created.

4. Verify your Security Setup:
  1. Create, view, and update a Visibility.
  2. Create, view, and update categories.
  3. Create, view, and update a Category Security Group.
  4. Associate Categories to the Category Security Group.
  5. Associate Authoring Flows to the Category Security Group.
5. Verify your Knowledge Base Structure:
  1. Create, view, and update a Solution Type.
  2. Create, view, and update a Statement Type.
  3. Associate and disassociate a Statement Type to a Solution Type.
  4. Relate Statement Types to Note Types (for Integration).
  5. Create, view, and update the Time Periods.
  6. Create, associate usage, and preview autolinks.
6. Verify that you have set up the Oracle Knowledge Management profile options.

## Verify Knowledge Authoring

The following procedures summarize how to verify knowledge authoring in Oracle Knowledge Management.

### Steps

1. Create a solution.
2. Create a statement and associate it to a solution.
3. Associate a category to a solution.
4. Associate a item to a solution (if used in your implementation).
5. Associate a platform to a solution (if used in your implementation).

6. Associate attachments to a solution.
7. Associate a task template to a solution (if used in your implementation).
8. Associate an external objects to a solution (if used in your implementation).
9. Save the solution.
10. After saving the solution, add a solution comment to the solution.
11. Submit a solution to an authoring flow.
12. View and search solutions in progress.
13. Check-out and update an in-progress solution.
14. Publish a solution.
15. Run the Solution Index Synchronization Concurrent Program (Sync).

## Verify Knowledge Search

The following procedures summarize how to verify searching in Oracle Knowledge Management.

### Steps

1. Perform a Simple Search. After the **Knowledge Management Statement Index Synchronization** concurrent program has completed successfully, verify that you can search for the solution that you created in the Authoring Verification Section.
2. Perform an Advanced Solution Search.
3. Perform a Statement Search.
4. If Oracle Secure Enterprise Search (SES) is used, verify that SES shows up in the search result under the appropriate context.



---

# Diagnostics and Troubleshooting

This chapter covers the following topics:

- About this Chapter
- Search Related Problems
- Integration Related Problems
- Authoring Related Problems
- Setup Related Problems
- Miscellaneous Problems

## About this Chapter

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

## Search Related Problems

**What are the factors that determine the solutions that I can see in Oracle Knowledge Management?**

In Oracle Knowledge Management, the biggest factors that determines which solutions a user can see are:

- The solution contents.
- The users access to this content, such as Security.

Security concerns the following areas:

- **Category Security Group:** Which categories has the user been granted access to?

- **Category Visibility:** Within the category, which categories are visible to the user?
- **Solution Visibility:** Which solutions within the current Category Security Group are visible to the user?
- **Statement Visibility:** Which statements (within the visible solutions) are visible to the user?

For information regarding Security setup, see:

- Set Up Security, page 4-6.

**After upgrading to a new release, I cannot search for solutions.**

- Be aware that building indexes is a post-installation process.
- To minimize the patching time, Oracle Knowledge Management creates the index structure during patching. Oracle Knowledge Management then submits a concurrent request--**in DR mode**--for rebuilding the index.
- Search does not work until indexes are rebuilt.

**Why can I not find a new solution using Advanced Solution Search or Simple Search pages?**

The system must index a solution before you can retrieve it through a search. To search and view new solutions, you must first run the **Knowledge Management Solution Index Synchronization** concurrent program to refresh the solutions and the solution count in the knowledge base.

If the Solutions are indexed and are still not showing in the search results, you must verify your Oracle Knowledge Management Security Setup to verify if you have the required access to see the solutions.

Users can search only published solutions in Simple Search or Advanced Solution Search.

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

Whenever a solution is updated, it is marked for re-indexing.

**After upgrade, I cannot see restrict solutions or statements.**

If you have restrict permission assigned before upgrade, change the solution Visibility and statement Visibility profiles to **Restrict**.

**During searching, I have encountered error "Your search did not return any results in Solutions. Please contact your system administrator if this problem continues."**

Your Oracle Knowledge Management indexes may be corrupted.

To resolve this, submit a concurrent request to drop and recreate the index (**mode = DR**). If you know which specific index is corrupted, you can submit the related index synchronization program. If not, you can submit the request set to rebuild all the

indexes. If you have lots of data, rebuilding all indexes may take a while.

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

The Oracle Text index column on your environment is not indexed, or the index is still being built. If the **Knowledge Management Solution Index Synchronization** concurrent program is running, then wait until the concurrent program has completed. Otherwise, you can recreate the index by submitting this concurrent program using the **DR** mode. You can also do this by running the following script:

```
$APPL_TOP/cs/patch/115/sql/cskbsetx.sql.
```

**What does the following error indicate: java.sql.SQLException: ORA-20000: Oracle Text error: DRG-10599: column is not indexed?**

The Oracle Text index column on your environment is not indexed, or the index is still being built. If the concurrent program associated to the index that gives this error is running, wait until the concurrent program has completed. Otherwise, you can recreate the index by submitting this concurrent program using the **DR** (drop and recreate) mode. Depending on the index, you can drop and recreate the index by running **one** of the following scripts:

- For solutions: \$APPL\_TOP/cs/patch/115/sql/cskbsetx.sql
- For statements: \$APPL\_TOP/cs/patch/115/sql/cskbelex.sql
- For categories: \$APPL\_TOP/cs/patch/115/sql/cskbcatx.sql

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

The Oracle Text Index is missing or it is being built. If the Knowledge Management Statement Index Synchronization concurrent program is running, then wait until the concurrent program has completed. Otherwise, you can recreate the index by submitting this concurrent program using the **DR** mode. You can perform this by running the following script:

```
$APPL_TOP/cs/patch/115/sql/cskbelex.sql <cs user>
```

**Can the search methods (Using) on the Advanced Solution Search or the Simple Search page be configured?**

Yes, you can configure the search methods on the Advanced Solution Search. The **CS\_KB\_SEARCH\_TYPE\_OPTIONS** Lookup Type contains a list of lookup values that represent the different search methods.

**Why cannot I see the result of a search repository when I perform the simple search?**

A search repository appears on the simple search result only if it is mapped to the respective context. A setting at the responsibility level overrides the application level,

which then overrides the global level. Make sure that the repository is assigned to the lowest level of the desired context.

If the repository has already been assigned, and the result still does not show up, then check if the repository is of custom type and that the repository has been defined properly. A custom repository with an incorrect JRAD region causes the result tab not to show up. An administrator can check the log details to determine the exact cause of the issue.

**A keyword pattern is hyperlinked based on an autolink setup. However, when I click the link, I do not have access.**

Autolink functionality is not intended for security, and thus a hyperlink is created as long as the autolink configuration applies. If a user has a different type of contents that may be visible only to certain people, then a different autolink should be created and different statements may be needed to contain the different autolink.

**I have defined an autolink and have created a solution that uses it. However, when I view the solution, I cannot see the keyword pattern being hyperlinked.**

Please check the following:

- The autolink has been mapped to the appropriate context.
- If you create the statement details using the Rich Text Editor, then add the '>' character in the keyword pattern Preceding Characters field and the '<' character in the Parameter Following Characters field to enable the New Line delimiting character. The Rich Text Editor automatically generates HTML tags to wrap around each paragraph that you type in the editor.
- For a keyword pattern used in agent pages, if the autolink is the Function type, then the function definition must include `&cskDLink=OA`.
- A function definition used by an autolink must not contain "param=" at the end of its HTML call. If the URL needs to have a dynamic parameter value appended to it, then the proper procedure is to set the Destination Parameters field for an autolink.

## Integration Related Problems

**Upon launching the Oracle Knowledge Management HTML user interface from the Service Request form, I receive the following error: "You have insufficient privileges for the current operation. Please contact your System Administrator."**

You may not have the appropriate security menu or function granted. For details of access control settings, see Access Control, page 3-1.

**Why do I not get results when I use Oracle Knowledge Management from Service Request to search for a solution?**

First of all, verify that you can search as a Knowledge Administrator:

- Run the Knowledge Base Sync Index concurrent program to re-index the Oracle Knowledge Management solutions.
- Verify that the solutions that you have created and submitted are not in the Draft status. The solutions must be in the Published status to be re-indexed.

If you can search as Knowledge Administrator, then verify that the Oracle Knowledge Management's required security profiles are properly set up for the application or Responsibility that you are using. For more information, see *Set Up Security*, page 4-6.

If you cannot perform a search even as a Knowledge Administrator (providing that you have already set up the required security profiles), then verify that the package `cs_kb_ctx_pkg` is installed in your environment's `ctxsys` schema. If this package is not installed or is improperly installed, then the Oracle Text text indexes cannot properly become populated, and you cannot find anything in the knowledge base.

Install the package by running the `$CS_TOP/patch/115/sql/cskbctxs.pls` and `cskbctxb.pls` scripts. Use the parameters as documented in the scripts and then rebuild the index.

**When performing search on Oracle Knowledge Management from integrated module, I am not brought to the Advanced Solution Search page.**

The profile **Knowledge: Search to display for integrating applications** controls the search to perform from integration. The setting is defaulted to the Simple Search.

**When performing Advanced Solution Search on Oracle Knowledge Management from Oracle Service, the Notes components of the service requests do not appear.**

Verify the profile **Knowledge: Pass all mapped notes to KM for solution searching and authoring**. Please also make sure that the note type to statement type mapping is performed and that the notes are not of private status.

**How can I link solutions to the calling application, say from Oracle Teleservice?**

When you come from the update service request form to Knowledge Management search, you can link the solution back to the service request by clicking one of the buttons Yes, No, or Maybe.

**In Oracle TeleService, after I click the Yes button for "Is this solution useful in resolving your question or problem?" and after I click the Refresh button on the Oracle TeleService Workbench tab, the solution does not appear in the Notes and Knowledge section and the row is not being added to the CS\_KB\_SET\_LINKS table.**

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

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

## Authoring Related Problems

**I have created a Solution Type, but when I create a solution it does not appear on the**

### **Solution Type list?**

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

### **The Rich Text Editor does not appear. Why? Rich Text Editor does not appear on the Create or Update Statement page even if I select HTML or HTML with Autolink content type. Why?**

Rich Text Editor works only under a browser that supports IFRAMES.

You need to turn **off** the OA Accessibility feature setting. The OA profile option is **Self Service Accessibility Features**.

### **Can I reference image files in a statement?**

You can reference an image in a statement's details by copying the image from a Web page and pasting it in the statement details through the Rich Text Editor.

Uploading image from your desktop into the statement details is not supported.

### **When are statements considered duplicate?**

A statement is considered duplicate if an existing published statement already exists with the same summary, type, visibility, and detail.

### **How do I publish a statement?**

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

### **Why can I not edit a statement in a published solution that I am able to lock and update?**

A published statement cannot be updated because different solutions can potentially share the statement. Updating of the statement may not be valid for the context of all the solutions that are using this statement.

If you do want to update a statement, you can perform a statement global update. You must have been granted function CS\_KB\_GLOBAL\_UPDATE\_FN before you can perform this action. You can access this from the Statement Search page.

Alternatively, you can **copy as new** an existing statement to create a new statement based on the existing statement and make the corresponding change to the new statement.

### **As a member of a resource group assigned to all steps in an authoring flow, how can I get an e-mail for a solution that I created and submitted to that authoring flow?**

To get an e-mail notification for a solution, you need to verify that:

- In the workflow user preference setup, HTML mail has been selected.
- You have subscribed to the products or categories related to the solutions that you are interested in from the Subscription window.

- You have assigned the user or resource to the resource group associated with the authoring flow step to which the solution is being submitted.
- Ensure that the notification mailer in your environment is working.

**Note:** Users who have access to view the complete solution will receive notifications. The Security Setup for the user enables them to access both the solution and all its associated statements.

### **How do I delete a solution?**

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

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

Attachments to solutions in Oracle Knowledge Management are stored in the database through FND attachments. For more information on FND Attachments, see the *Oracle Applications System Administrator's Guide*.

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

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

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

### **Why do I see the following warning even if I do not select any Statement Type or Solution Type while creating a solution:**

"The statement types that follow are not compatible with the Solution Type that you have selected. Click the statement to modify its attributes."

All solutions and statements in Oracle Knowledge Management have to have a type. Statements without a type are considered as **not compatible**.

You have to update the statement to select a Statement Type. The warning goes away.

### **I have text solutions created that are no longer aligned on the new Solution Details page.**

The profile **Knowledge: Character display format for Statement text** controls the Text content type style.

## **Setup Related Problems**

### **Can I end-date a Solution Type?**

You can end-date Solution Type. End dating a Solution Type prevents any further

solutions of this type from being created after the end-date has expired. Solutions currently in progress can complete. End dating does not delete the Solution Type from the database.

**I cannot find the request set "Knowledge Management: index synchronization set", nor the concurrent programs "Knowledge Management Statement Index Synchronization", and "Knowledge Management Category Index Synchronization".**

Verify that the request set and the concurrent programs have been assigned to your request group.

## Miscellaneous Problems

**I login from jtflogin, but Oracle Knowledge Management does not function properly.**

You need to use the Self-Service (e.g. PHP) login instead of the jtflogin to access Oracle Knowledge Management. Switching Responsibility from jtflogin will not resolve this issue.

**After installing the system, I cannot find user actions tracked on Service Requests.**

To turn on tracking:

- Set the profile **Knowledge: Time period (in seconds) for user activity log** to a valid positive number.
- Bounce Jserv after changing the value of the profile option.
- Execute the following queries to see the tracking history in the database:  

```
select a.*, b.*  
from cs_kb_sessions a, cs_kb_session_attrs b  
where a.session_id = b.session_id  
order by a.last_update_date desc
```
- Verify the value of profile **Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation**.

**Buttons do not show up but appear as links**

Some buttons do not appear as buttons, but instead appear as links.

- Verify that the directory `/OA_HTML/cabo/images/cache/en/ (xxx.gif)` is writable. CABO generates buttons in that directory.
- Verify configuration of your X Server.

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

It is an Internet Explorer bug. You have to download and install a patch containing this

fix from the Microsoft Web site.



# Part 4

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## Integration of Oracle Products

This part contains the following chapter:

- Integration, page 8-1



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# Integration

This chapter covers the following topics:

- About this Chapter
- E-Business Suite Integration
- Additional Integration Setups

## About this Chapter

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

## E-Business Suite Integration

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

The tight integration that Oracle Knowledge Management has with several Oracle products allows the users of these modules to leverage knowledge in the knowledge base to resolve issues.

Oracle Knowledge Management integrates with other Oracle modules, such as Oracle TeleService, Oracle Field Service, and Oracle Depot Repair. This integration lets service

agents for these modules access to solutions.

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

Topics in this section include:

- Forms-Based Applications, page 8-2
- HTML-Based Applications, page 8-4

## Forms-Based Applications

When coming from agent integration flow, such as Service Request or Depot Repair, users can choose between Simple Search and Advanced Solution Search by setting the **Knowledge: Search to display for Integrating Applications** profile option. This profile's seeded value for the default search mode is Simple Search, which provides a more basic mechanism to search for solutions. The ability to search for service requests in Simple Searches also helps the agent to use the knowledge from previously resolved issues.

Forms-based applications that integrate with Oracle Knowledge Management include:

- Oracle TeleService, page 8-2
- Oracle Field Service, page 8-3
- Oracle Depot Repair, page 8-3

### Oracle TeleService

Oracle TeleService (Support module) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. Oracle TeleService uses Oracle Knowledge Management to leverage a knowledge base of previously reported problems and solutions. As users log new service requests, agents can search the knowledge base to identify existing solutions that can resolve customer issues or contribute new solutions to the knowledge base. A user can navigate from the View Service Request form to the Search window of Oracle Knowledge Management. The Notes component in a service request documents the description and progress being made in resolving a customer issue. Notes can provide details to search the knowledge base for solutions and statements. You can link a solution that was created in Oracle Knowledge Management to a Service Request. You can use Notes to create new statements that contribute to the knowledge base. An agent uses certain Note Types for searching the knowledge base and creating solutions. Examples of Note Types to use for searching include: Symptom, Cause, Action, Problem, and Solution.

**Note:** You can use as search criteria only those Note Types that you have mapped to Statement Types.

The following information from the service request are passed to the Solution Search

page:

- Service Request summary defaults to the key words for searching.
- For Solution Advanced Solution Search only, if your note was saved in the service request using a Note Type that has been mapped to a Statement Type in Oracle Knowledge Management, then the note text is passed over if user is using Solution Advanced Solution Search to perform the searching.
- Product (if this has not been personalized to be hidden on the Oracle Knowledge Management window).

You can view the details of all solutions found in the search and select the solutions that are useful for the resolving of your service request. You can also link relevant solutions to your service request. If you cannot find the appropriate solutions, then you can create a new solution based on the data from the service request.

As part of TeleService, Oracle Customer Management Contact Center users can also navigate to Oracle Knowledge Management through integration flows and achieve similar functionality as the preceding information mentions.

For more information, see the *Oracle TeleService Implementation Guide*.

### **Oracle Field Service**

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

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

A support agent analyzes service requests. The support agent searches Oracle Knowledge Management for a solution and creates a task based on the problem description and action needed to solve the problem.

For more information, see the *Oracle Field Service User Guide*.

### **Oracle Depot Repair**

Oracle Depot Repair tracks and manages the repair process in a service organization. This module reduces customer downtime while the product is being repaired.

Oracle Knowledge Management allows an agent in Oracle Depot Repair to review the full problem solution life span, starting from the initial diagnosis of a problem to problem resolution. A depot agent can search for a solution for a repair order by navigating to the Search window. Product and work summary of the repair order appear in the Solution Basic Search or the Advanced Solution Search window.

For more information, see the *Oracle Depot Repair User Guide*.

## HTML-Based Applications

HTML-based applications that integrate with Oracle Knowledge Management include:

- Oracle iSupport, page 8-4
- Oracle eMail Center, page 8-9
- Oracle Partner Management, page 8-9
- Oracle Customer Support, page 8-9

## Oracle iSupport

Topics for Oracle iSupport integration with Oracle Knowledge Management include:

- About Oracle iSupport, page 8-4
- Usage Recording, page 8-4
- End User Flows, page 8-5
- Set Up Guest Users, page 8-7
- Functions for Configuring Oracle iSupport Pages, page 8-8

### About 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 enhances customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations.

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

In the Create Service Request flow, an Oracle iSupport administrator can enable or disable the step of searching the knowledge base. For more information, see the *Oracle iSupport Implementation and Administration Guide*.

An Oracle iSupport user can search and view a solution by either clicking the Support tab or by clicking the **Find a solution link** on the iSupport Home page. He or she can also navigate to a solution listed in the Common Problems and Recommended Solutions section. The Solution Details appear. A user can provide feedback on the solution by selecting **Yes** or **No** for the feedback section. He or she can also click the **Add to Quick Links** hyperlink or click the Create Service Request button to navigate to Create Service Request window.

### Usage Recording

When users access Oracle Knowledge Management from iSupport, Oracle Knowledge Management tracks their searches, solution viewing, and feedback actions.

When users navigate from Oracle Knowledge Management to create a Service Request, the system records their tracked actions:

- The search key words that you use automatically appear in the summary of the Create Service Request page.
- Depending on profile **Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation** setting, the system records the viewing history and feedback on the Service Request. For more information, see the *Oracle iSupport Implementation and Administration Guide*.

The **Knowledge Management Calculate Solution Usage Score** concurrent program calculates the usage score.

The **Knowledge: Time period (in seconds) for user activity log** profile option enables solution usage recording for iSupport. The profile option defines the time frame within which the user activity tracking runs. By default, the time is 0, which means that no solution usage tracking occurs. Note that this profile does not control how the system stores the data in the service request.

The **Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation** profile controls how the data storage occurs. For more information, see the *Oracle iSupport Implementation and Administration Guide*.

You can also enable this solution usage recording for Partners Online if you set the profile the respective levels.

### **Purge Unused Tracking History Data**

When you enable the solution tracking feature, the system records data by each use of iSupport. Overtime, the tracked data can become very large. You should consider running the **Knowledge Management purge tracking history** concurrent program to purge the outdated data to improve the performance.

### **End User Flows**

End users--such as customers who search the knowledge base--access Oracle Knowledge Management through the Support tab in Oracle iSupport. Tasks that end users typically perform include:

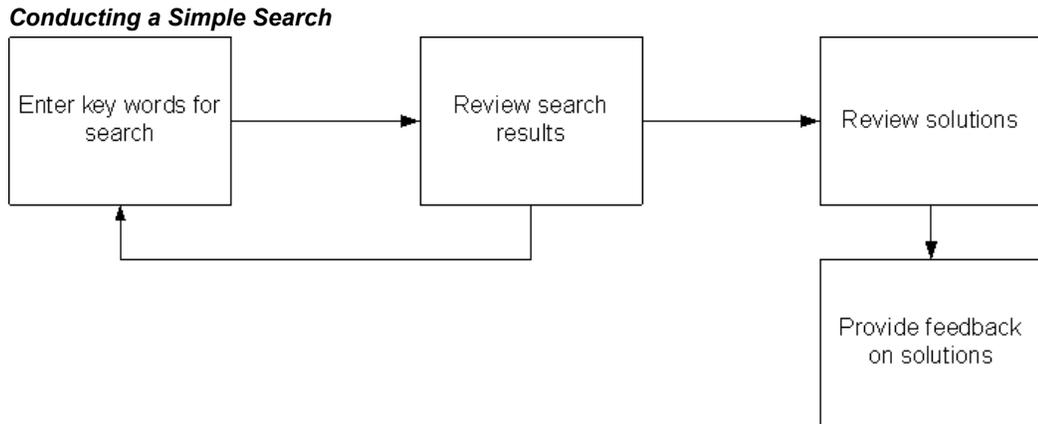
- Conducting a Simple Search, page 8-5
- Browsing Solution Categories, page 8-6
- Viewing Top Solutions in Oracle iSupport, page 8-7

The following flow diagrams show end-user processes.

### **Conducting a Simple Search**

The majority of end users searching the knowledge base conduct a key word search using the Simple Search functionality. The following figure, **Conducting a Simple Search**, shows the tasks that you use to conduct a Simple Search.

inserted figure title **Conducting a Simple Search**



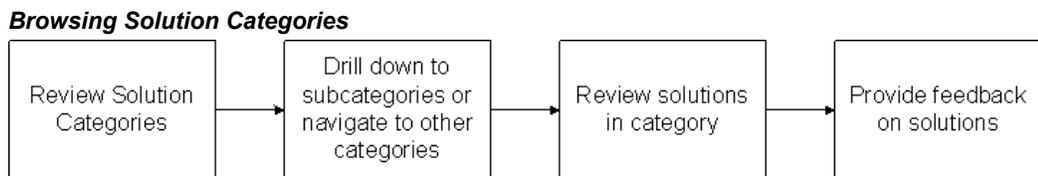
Conducting a Simple Search involves:

- **Entering key word for search:** Enter a key word or words.
- **Reviewing search results:** Review search results and decide whether or not to modify the search by entering new key words.
- **Reviewing solutions:** Review solutions that appear in the search results.
- **Providing feedback:** Indicate whether a solution helps to solve your problem by clicking a response at the bottom of the Solution Detail page. The system captures this information in usage counts that populate the Frequently Used Solutions list.

### **Browsing Solution Categories**

From the Simple Search page, end users can browse Solution Categories that are similar to folders for solutions. The following figure, Browsing Solution Categories, page 8-6, is a flow diagram that shows the tasks that you use to browse Solutions Categories.

inserted figure title **Browsing Solution Categories**



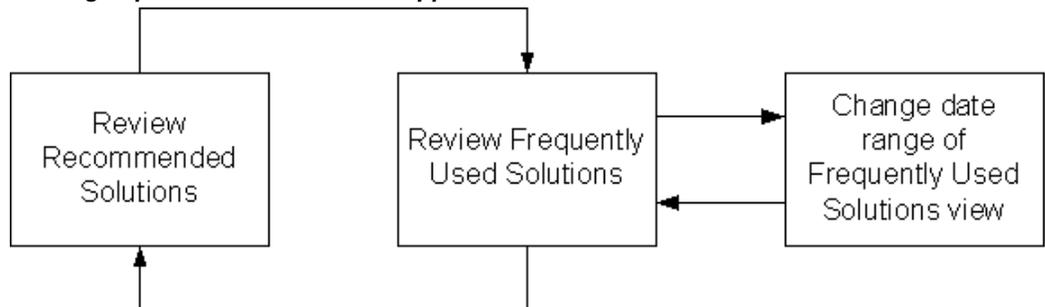
The tasks to browse Solution Categories include:

- **Reviewing Solution Categories:** Review Solution Categories to determine where you might find solutions that meet your needs.
- **Drilling down to subcategories or navigate to other categories:** Choose a subcategory or another category.
- **Reviewing solutions in category:** Review solution headers and detail to find an appropriate solution.
- **Providing feedback on solutions:** Indicate whether a solution helps to solve your problem by clicking a response at the bottom of the Solution Detail page. The system captures this information usage counts that populate the Frequently Used Solutions list.

### Viewing Top Solutions in Oracle iSupport

Users can navigate to a list of Recommended Solutions and Frequently Used Solutions from the Top Solutions subtab in Oracle iSupport. The following figure, Viewing Top Solutions in Oracle iSupport, page 8-7 shows the tasks that you use to view Top Solutions in Oracle iSupport.

*Viewing Top Solutions in Oracle iSupport*



Oracle iSupport users can navigate to the Top Solutions tab to review the following lists of solutions:

- **Recommended Solutions:** View a list of recommended solutions. The Recommended Solutions list is a list of solutions that the Knowledge Administrator chose to appear in Oracle iSupport.
- **Frequently Used Solutions:** View a list of frequently used solutions. The basis of the Frequently Used Solutions list is usage counts. Users can filter the Frequently Used Solutions by specifying the date range.

### Setting Up Guest Users

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

**Note:** Oracle iSupport provides Guest User support for Oracle Knowledge Management.

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

- Simple Search page and Browsing page
- Search Result pages
- View Solutions Detail page

When a registered user has not logged in to the applications, but uses the URL to open any of the preceding pages, the module displays the page in Guest User mode, with the Login icon. Users can log in to see pages for their respective role and permission.

For more information, see the *Oracle iSupport Implementation and Administration Guide*.

### Functions for Configuring Oracle iSupport Pages

When the profile **Oracle iSupport Page Level Configuration Option** is **on**, you can configure the high-level look and feel of the user interface (UI) for the Browser, Search Results, and Solution Details pages that appear in Oracle iSupport by defining the appropriate JSP name in the following FND functions:

- **Top:** Indicates that the JSP appears at the top of the content page.
- **Left:** Indicates that the JSP appears at the left of the content page.
- **Right:** Indicates that the JSP appears at the right of the content page.
- **Bottom:** Indicates that the JSP appears at the bottom of the content page.

For more information, see the *Oracle iSupport Implementation and Administration Guide*.

### Browse Pages Functions

- **CS\_KB\_BROWSE\_TOP\_FN:** Top section of Browse page
- **CS\_KB\_BROWSE\_LEFT\_FN:** Left section of Browse page
- **CS\_KB\_BROWSE\_RIGHT\_FN:** Right section of Browse page
- **CS\_KB\_BROWSE\_BOTTOM\_FN:** Bottom section of Browse page

### Search Pages Functions

- **CS\_KB\_SEARCH\_RESULT\_TOP\_FN:** Top section of Search Result page

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

#### **Solution Detail Functions**

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

#### **Oracle eMail Center**

Oracle eMail Center is the module for managing inbound e-mail interactions with customers, partners, suppliers, employees, and others that interact with an organization. Oracle eMail Center provides an agent with tools and capabilities to maximize their productivity and effectiveness.

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

For more information, see the *Oracle eMail Center User Guide*.

#### **Oracle Partner Management**

Oracle Partner Management is the entry point for Partner Relationship Management (PRM) services across the pre-sales, sales and post-sales intercompany processes for companies and their partners. These services include:

- Partner profiling and opportunity matching for the vendor
- Online access to latest product collateral in addition to sales and service support for the partners.

Users of Oracle Partner Management can access the Support tab in Oracle iSupport. For more information, see the *Oracle Partner Management Vendor User Guide* and the *Oracle iSupport Implementation and Administration Guide*.

#### **Oracle Customer Support**

Customer Support is a module of Oracle TeleService and integrates with Oracle Knowledge Management in a way that is very similar to that described in the TeleService section, page 8-2.

## Additional Integration Setups

The following procedure uses the integration points in the Oracle E-Business Suite:

- Map a Statement Type to a Note Type, page 8-10

### Map a Statement Type to a Note Type

The Notes component is a Common Application Component within the Oracle E-Business Suite. The Notes component includes a seeded set of defined Note Types that you can use throughout the Oracle E-Business Suite. Individuals with the CRM Administrator Responsibility can also create additional customized Note Types.

You use Notes in a Service Request to document the description and progress made in resolving customer issues. The Notes component captures details that you can use to search the knowledge base for solutions or to create new solutions. For more information, see *Oracle TeleService Implementation Guide*.

You can map a Note Type to a Statement Type. Although it is possible to set up a multiple-to-multiple mapping relationship between Note Type and Statement Type, one-to-one mapping is highly recommended.

You use this mapping to translate Notes from other objects, especially service requests, into Statement Types in Oracle Knowledge Management.

This integration is primarily used with Oracle TeleService.

#### Responsibility

Knowledge Administrators with edit permission (CS\_Type\_Edit) can relate a Statement Type to a JTF Note Type.

#### Prerequisite

None

#### Steps

1. Create a new Statement Type or navigate to an existing Statement Type.
2. In the Related section, choose External Links from the list.
3. Click Add.  
The Select an External Object window appears.
4. Click Note Type.  
The Note Type window appears.
5. Search for the Note Type that you want to add to this Statement Type.

**Tip:** Use (%) in Description field for a wildcard search.

6. From the Search Results choose the JTF Note Type to add to the Statement Type.
7. Click Update.



# Part 5

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## Administration

This part of the *Knowledge Management Implementation and Administration Guide* contains the following chapters:

- Managing Solution Types, page 9-1
- Managing Statement Types, page 10-1
- Managing Categories, page 11-1
- Managing Authoring Flows, page 12-1
- Managing Repositories and Contexts, page 11-1
- Managing Security, page 14-1
- Managing Autolinks, page 15-1

**Note:** Unless otherwise noted, you require the self-service login and Knowledge Administrator responsibility to access all Oracle Knowledge Management application pages described in this part. The description of each page does not repeat this information.



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# Managing Solution Types

This chapter covers the following topics:

- About Solution Types
- Create a Solution Type
- View or Update a Solution Type

## About Solution Types

Administrators create solution types to help describe and classify solutions within the knowledge base. In addition, you define **mandatory statement types** to ensure that you classify solutions within that solution type and the solution types have a similar format. For example, Oracle Knowledge Management included the seeded Symptom-Cause-Action (SCA) solution type, which requires that any solution that you categorize as an SCA solution type contains 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. You can create an unlimited number of solution types for your company's specific needs, however, the knowledge base is more effective and easier to manage if you limit the number of solution types.

Examples of common solution types include:

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

## Create a Solution Type

Oracle Knowledge Management includes the seeded Solution-Cause-Action (SCA) solution type. The Oracle Knowledge Management system prevents the creation of duplicate solution types. When you create a solution type, you must also associate at least one statement type with the solution type before you can use the solution type for creating solutions. The following procedure describe how to create a new solution type.

### Prerequisites

Oracle Knowledge Management administrators with edit permission (CS\_Type\_Edit) can create a new solution type.

### Navigation

Setup > Types > Create Type

### Notes:

- The description of a solution type is only for administrators. Customers cannot view the description.
- End-dating a solution type prevents any further solutions from being created after the end date has occurred. Solutions currently in progress are allowed to complete. End-dating does not delete the solution from the database.
- Clicking Create displays the Related Statement Types region, to which you can add statement types. You must associate at least one statement type with the solution type before you can use the solution type for creating solutions. A solution type without an associated statement type is incomplete and is not available to choose from the Solution Type list when a user creates a new solution. Clicking Add/Delete from here takes you to the Associate Statement Types page, where you can make the association.

## View or Update a Solution Type

Use this procedure to view or update existing solution types.

You can add additional statement types to a solution type. For example, you may want to add the Fact statement type to record additional information about a situation.

### Prerequisites

You must have edit permission (CS\_Type\_Edit) to edit a solution type.

### Navigation

Setup > Types > Solution Types

### Notes

- In the Type No. column, click the link to navigate to the Solution Type page to view or edit solution type details.

## Solution Type Page

### Notes

- This page includes **two** Update buttons. The upper Update button applies **only** to changes that you make to text above it. The lower Update button is in the Related Statement Types section and applies **only** to changes that you make to Statement Types.
- In the Related Statement Type region, the Optional column check box indicates whether or not the statement type is optional. When you associate a new statement type with the solution type, by default, its association is as an optional statement. By clearing the check box, you are making the statement type mandatory.
- You **cannot** delete the default solution type, Symptom-Cause-Action (SCA). You can delete a solution type only if no solutions use it. You cannot undo the deletion procedure.
- If a solution type that you want to delete has any related statements types or external links listed in the Related Statement Types region, then you must first delete them by using Add/Delete to disassociate them from the solution type.



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## Managing Statement Types

This chapter covers the following topics:

- About Statement Types
- Create a Statement Type
- View or Update a Statement Type

### About Statement Types

A statement is a description of any aspect of a problem, its cause, or its resolution. Statements 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. Statement types 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 is more effective and easier to manage if you limit the number of statement types.

**Note:** You can map statement types in Oracle Knowledge Management to note types in Oracle TeleService. If you map a statement type to a note type, and users access Oracle Knowledge Management through the Advanced Search from TeleService, the note types to which you mapped statement types appear as statement criteria in the Statement section of the Advanced Search page.

### Create a Statement Type

The following procedures describe how to create a statement type.

### Prerequisites

Oracle Knowledge Management administrators with edit permission (CS\_Type\_Edit) can create a new statement type.

### Navigation

Setup > Types > Create Type

### Notes

- End-dating a statement type prevents any further statements of this type from being created after the end date has expired. Oracle Knowledge Management allows statements that are currently in progress to complete. End-dating does not delete the statement type from the database.
- Clicking Create brings up the Statement Type page with a Related region, You can associate the statement type only with a solution type from the View Solution Type page.
- When you relate a statement type to an external link for a note type, relate one statement type to only **one** note type.

## View or Update a Statement Type

The following procedures describe how to view or edit a statement type.

### Prerequisites

Internal users with view permission--CS\_Statement\_View--can view existing statement types. Oracle Knowledge Management administrators with edit permission (CS\_Type\_Edit) can edit a statement type.

### Navigation

Setup > Types > Statement Types

### Notes

- Click the numbered link to navigate to the Statement Type page for the selected statement type.

### Statement Type Page

#### Notes

- On the View Statement Type page, you cannot associate a solution type with a statement type, but you can disassociate the solution type from a statement type.
- You cannot delete the default statement type. You can only delete a statement type if no statement has ever used the statement type. You cannot undo the deletion procedure.

- You cannot remove a solution type that a statement types uses if it is associated with existing solutions in the knowledge base.



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## Managing Categories

This chapter covers the following topics:

- About Managing Categories
- Categories: Setting Up, Updating, Moving, and Deleting

### About Managing Categories

Categorization of solutions is the process of grouping solutions together for browsing or for performing a category-specific search for solutions. You organize solutions into categories for convenient management. Using the analogy of a library, you could:

- Characterize fiction as a category.
- Characterize mysteries and classics as subcategories.
- Compare book titles to 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 you limit their number.

Solution categories are the same as **categories**.

### Categories: Setting Up, Updating, Moving, and Deleting

You use a closely related set of windows to set up, update, move, and delete categories.

#### Navigation

Setup > Categories

#### Notes

- Categories help control Security and access to solutions. You control access to categories through the **Visibility setting**. The Visibility settings of categories,

solutions, and statements are factors to determine whether or not a particular user can access the solution. The Visibility setting specifies the confidentiality of the solution.

- When you define the categories, you choose from a list of visibilities for each category. You cannot specify that a child category--a subcategory--be more visible than its parent category. Oracle Knowledge Management filters the list of available visibilities that are available for a child category according to the Visibility of its parent.
- You also organize categories into views or Category Security Groups. Category Security Groups define which categories a user can see by way of its association with user Responsibilities.

For more information about Security, Visibility, and Category Security Groups, see *Managing Security*, page 14-1.

- Knowledge workers can add more than one category to a solution. Categories are a **mandatory** attribute for creating solutions. For example, a computer manufacturer might have a solution that addresses issues with both a printer and a laptop computer. If that company had both Computer and Printer categories, it would make sense to add both of the categories to the solution. Hello
- Knowledge workers can add more than one category to a solution. Categories are a **mandatory** attribute for creating solutions. For example, a computer manufacturer might have a solution that addresses issues with both a printer and a laptop computer. If that company had both Computer and Printer categories, it would make sense to add both of the categories to the solution.
- Knowledge administrators define and manage the number of categories in the knowledge base to ensure that 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.

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## Managing Authoring Flows

This chapter covers the following topics:

- About Authoring Flows
- Create an Authoring Flow
- Enable or Disable an Authoring Flow
- View and Modify an Authoring Flow

### About Authoring Flows

Oracle Knowledge Management integration with Oracle Workflow provides a workflow process to Oracle Knowledge Management internal users to manage the solution approval and rejection processes. It is a flexible method for Oracle 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 or her own work area or to submit the solution to an authoring flow for further processing in the solution detail page.

### About Solution Authoring Flows

A solution authoring flow in Oracle Knowledge Management consists of a series of steps through which a solution goes before reaching a desired state. Each step in the authoring flow includes both an assigned resource group and an action to perform. The resource group can include one or more members. An Oracle Knowledge Management administrator can:

- Define and choose each step of an authoring flow.
- Assign a resource group to each step of an authoring flow.
- Choose an action at each step of the flow.

You can set up the subscription to specify the solutions for which you would like to receive e-mail notification. Whenever a solution that relates to the subscribed item (product) or categories is ready for reviewing, the system sends e-mail notification to you.

When a solution author submits a solution to an authoring flow:

- A copy of the solution remains outside the authoring flow so that others can view it immediately if the solution has been previously published.
- A new copy of the solution is available for processing within the authoring flow.

## Create an Authoring Flow

### Prerequisites

Administrative permission to create a new authoring flow

### Navigation

Setup > Authoring Flows > Click Create

### Notes for the Authoring Flow Set Up page

- The attributes for a named flow are defined as follows:
  - **Order:** Defines the sequence of steps in an authoring flow. It is a numbered order that determines how the steps in a flow appear. For example, a step with an order number 1 appears before a step with the order number 5.
  - **Step:** Represents the various transitions within an authoring flow. For example, your choices of Steps might include: 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 permission to lock and update and modify a solution in a specific step of an authoring flow. You can assign each step in an authoring flow to any of the available user groups that have required permission.
  - **Action:** Represents the action that the Oracle Knowledge Management system must take at each step of an authoring flow. Choices for an authoring flow can include:
    - **Notify:** Members of the resource group assigned to this step receive notification.
    - **Obsolete:** If you assign Obsolete to a step, when the solution reaches this step, it will have an Obsolete status. The solution remains in the system, but

it is no longer visible to any user.

- **Publish:** If you assign Publish to a step, when the solution reaches this step, it will have a Publish status. If the Visibility for the solution on the Solution Detail page had been **External**, then the solution is visible to external users. Members of the resource group who are assigned to this step receive notification.
- Click Each flow must have at least one step of the action **Publish** or **Obsolete**. Also, the action for the last step must be either Publish or Obsolete.

## Enable or Disable an Authoring Flow

An Oracle Knowledge Management administrator can enable or disable the authoring flows.

### Prerequisites

Administrative permission to create a new authoring flow

### Navigation

Setup > Authoring Flows

### Notes

- You cannot disable a flow that has been set as a default flow profile option.

## View and Modify an Authoring Flow

Authoring flows describe the steps through which a solution goes in the solution approval or rejection processes.

### Prerequisites

Administrative permission to view (CS\_Workflow\_Setup\_View) a workflow.

### Navigation

Setup > Authoring Flows

### Steps

1. Click the Update More Details icon that corresponds to an authoring flow to bring up the Authoring Flow Set Up page, which displays the authoring flow details.

Due to the clarity of the user interface for this page, it requires no further explanation.



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## Managing Repositories and Contexts

This chapter is applicable only to service providers. For service requestors through Oracle iSupport, please refer to Customizations and Extensions, page 5-1.

This chapter covers the following topics:

- About Repositories and Contexts
- Manage Repositories
- Map Contexts to Repositories

### About Repositories and Contexts

Oracle Knowledge Management users can quickly integrate and use their existing knowledge documents within Oracle Service applications. The documents constitute a large pool of unstructured data and can include, for example, product manuals, training guides, and corporate presentations. Specifically, users can:

- Search for documents on web sites  
Oracle Secure Enterprise Search (SES) achieves this functionality.
- Search for documents within local and network file systems  
SES achieves this functionality.

A repository defines a collection of documents that can be searched. Contexts control access to these repositories.

### Manage Repositories

Repositories defined in Oracle Knowledge Management can be of the following types:

- custom
- Oracle Secure Enterprise Search

Custom repositories refer to custom repositories built by a service requestor in the Oracle Applications Framework as described in the section Define Simple Search Repositories, page 5-3. If you have implemented Oracle Secure Enterprise Search, then you can define SES repositories. The setup instructions for SES are in the Oracle Secure Enterprise Search Web page, which is on the Oracle Technology Network (OTN) at <http://www.oracle.com/technology/products/oses/index.html>.

In the Manage Repositories page you provide the technical properties of the repositories referenced in the Repository Mappings region of the Mapping Contexts page. The properties depend on the repository type.

### Navigation

Setup > Repositories > Manage Repositories

### Notes for Secure Enterprise Search (SES) Repository Properties (Repository Details Region)

- **END\_POINT:** This is the URL from which the SES search web server is hosted.
- **PROXY\_HOST, PROXY\_PORT:** These fields specify a proxy server through which search requests to the SES server must be made.
- **DATA\_GROUPS:** This property is a comma delimited list of data groups that are defined in the SES setup. Data groups are groupings of data sources. When this property is set, search for this repository is restricted to documents in the list of specified data groups.

### Notes for Custom Repository Properties (Repository Details Region)

- **Results JRAD:** This is a UI region within the OA framework for showing search results.
- **Search VO:** This is the name of Java view object that contains the query to perform a search and returns the results (not merely a count).
- **Count VO:** The Count VO is a view object that encapsulates a procedure to return how many search results occur for a given keyword search.

## Map Contexts to Repositories

In the Mapping Contexts page you define which set of repositories will be searched and what their display order is in the Basic (Unified) Search page. You can define multiple tab configurations for different scenarios of user responsibilities and can make mappings for a Global, Application, or Responsibility context.

### Navigation

Setup > Repositories

### Notes

- When adding contexts, keep in mind that settings at the Responsibility level override Application settings, which override Global settings for a particular user.



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## Managing Security

This chapter covers the following topics:

- About Security
- Set Up and Maintain Visibility Levels
- Set Up and Maintain Category Security Groups

### About Security

**Note:** The audience for this chapter is the administrator who organizes, sets up, and maintains the master category hierarchy and Solution Security.

Overview topics in this section include:

- Summary, page 14-2
- Visibility, page 14-3
- Category Security Groups, page 14-4
- Solution Security Filtering Hierarchy, page 14-5
- Statement Filtering and Category Security Groups, page 14-5
- About Associating Solutions and Categories, page 14-5
- Solution Security Relationships, page 14-5
- About Changing Security Settings, page 14-9

## Summary

Solution Security provides a flexible way to control the user access of solutions. Solution Security identifies which solutions in the knowledge base that users can access. Solution Security uses the following main factors to determine whether or not a user can access a solution:

- **Category Security Groups:** Category Security Groups--also known as category views--provide users access to a group of solution categories. Users can access only the categories within their assigned categories and subcategories. For more information, see *Category Security Groups*, page 14-4.
- **Categories:** Categories are groups of solutions by subject area. Solution categories are comparable to a folder that contains solutions. Security control at the category level, using *Visibility*, restricts access to all solutions and subcategories within the category. For more information, see *Managing Categories*, page 11-1.
- **Visibility:** Visibility is the relative sensitivity or confidentiality of a solution. You associate visibilities with users, categories, subcategories, solutions, and statements. All of these associations impact which solutions that a user can access. For more information, see *About Visibility*, page 14-3.
- **Read Access Controls:** Users can access Oracle Knowledge Management when:
  - The user's assigned *Visibility* is more restrictive than the data *Visibility* level.
  - A category belongs to the assigned *Category Security Group* and the category is visible.
  - A solution belongs to an accessible category and the solution is visible.
  - A statement belongs to an accessible solution and the statement is visible.
- **Write Access Controls:** Solution Security has the following write-access controls:
  - When submitting a solution for approval, a user can only submit to flows associated with one's own *Category Security Group*.
  - On top of the resource group checking, a user can only lock and update a solution if the solution is accessible and the user can see all the statements of the solution. If security setup changes and causes the loss of read-write access to locked solutions, a concurrent program can unlock the "stuck" solutions for other users to work on.

## About Visibility

The sensitivity or visibility of a categories, solutions, and statements is a factor that determines whether or not a particular user can access a category, solution, and statement. The Visibility Level is a reflection of the confidentiality or sensitivity of the category, solution, and statement. For example, some solutions are more sensitive or confidential than others, and therefore you should allow only a specific group of users to access them. Some solutions are not so sensitive, such that you consider them to be general access solutions that customers--or possibly anyone--could have access to.

Visibility is a linear scale of designating the relative sensitivity or confidentiality of categories, solutions, and statements. You cannot create duplicate Visibility names.

### High Restrictions, Limited Access

At one end of the linear scale, a Visibility Level is highly restrictive with limited access. A highly restrictive Visibility Level is for highly sensitive or highly confidential information.

### Low Restrictions, Broad Access

At the other end of the linear scale, the Visibility Level has low restrictions with broad access. A Visibility Level with low restrictions is for broader, more public audiences, where the information has low sensitivity or low confidentiality.

## Categories

You--the administrator--organize and create categories. When you create categories (and subcategories), you specify the Name and Visibility. When you define the categories you choose from a list of visibilities for each category. You cannot specify that a child category--a subcategory--be more visible than its parent category. Oracle Knowledge Management filters the list of available visibilities that are available for a child category according to the visibility of its parent.

For more information, see *Managing Categories*, page 11-1.

## Solutions

Solution authors specify the visibility of their solutions when they create or update solutions.

## Statements

Authors of statements specify the visibility of statements when they create or update them.

## Organization of Visibility Levels

Visibility levels let you define how the visibilities fit together in a linear manner or scale, from low sensitivity to high sensitivity.

Visibility levels for category and solution are extensible. As an administrator, you can insert new visibility levels anywhere along the scale. At the time of implementation, you should set up visibility levels and associate them to user access.

Visibility levels for statements are not extensible. You cannot modify the seeded visibilities for statements.

Typically, high visibility categories, solutions, or statements have low sensitivity, and many people can view them. On the other hand, low visibility categories, solutions, or statements have high sensitivity, and relatively few people can view them. The highest visibility might be for external usage, and the lowest visibility might be for internal usage.

Before you assign visibility levels to categories, you must create the master category hierarchy. As you create the categories in the hierarchy, you assign the category visibility levels. When users create solutions and statements, they assign each solution and statement a visibility Level.

For more information on creating categories, see *Managing Categories*, page 11-1.

### **Seeded Visibility Levels**

Oracle Knowledge Management includes:

- Seeded visibility levels of **Internal** and **External**.
- End-dated visibility levels of **Limited** and **Restricted** to accommodate backward compatibility. However, new installations include only the seeded Internal and External visibility levels.

### **User Visibility Levels**

As the administrator, you need to assign visibility levels for user access. When the user logs on, Oracle Knowledge Management allows the user to access all the solutions that are at the assigned visibility Level up to the most visible level. You can define and configure user access levels at any time. Oracle Knowledge Management provides the seeded solution access levels of **Internal** and **External** for new installations.

If you are upgrading from an earlier version of Oracle Knowledge Management, you can add **Restricted** and **Limited** access levels to maintain backward compatibility. You would normally perform that setup during implementation.

## **Category Security Groups**

In addition to Visibility assignments to categories, solutions, and statements, you associate Category Security Groups (category views) with categories and responsibilities. Category Security Groups are the means of partitioning the full set of solutions so one set of users can see only one set of categories, while another set of users can see another set of categories.

When a user logs on, Oracle Knowledge Management determines in real time the user's responsibility and therefore the category view.

The assignments of Visibility and Category Security Groups determine which categories that the user has access to, such as for searching or browsing, creating solutions, and drilling down to statement details.

Depending on a user's access, the categories within their Category Security Group (category view) appear. Even though a user has a particular category view, the user might not see all the categories if that user has a low sensitivity visibility assignment, but within that category, there are highly sensitive categories, for example. This means that two users who have access to the same category view can see different categories depending on the visibility of those categories and their user access.

## **Solution Security Filtering Hierarchy**

Solution Security evaluates the Category Security Groups (category views) and the Visibility Levels of categories, solutions, and statements to determine what the user can have access to. Solution Security uses the following filtering sequence:

1. Category Security Groups are the first level of filtering. This occurs when a user logs on to or accesses Oracle Knowledge Management.
2. Category visibilities are the second level of filtering. A user can only access the categories within his access level. If there are solutions that are within the user's Visibility Level, but are in a category the user cannot access, the user cannot successfully search for, browse, or view those solutions. Within a category, the user has access only to the solutions and statements within his Visibility Level.

## **Statement Filtering and Category Security Groups**

There is no direct connection between statements and category groups. Statement filtering is by statement Visibility and then indirectly through the solution to which the statement belongs, and then the category group to which the solution belongs.

## **About Associating Solutions and Categories**

Because you can associate solutions with multiple categories, solutions can also belong to more than one Category Security Group.

Other solutions might re-use the statements from other published solutions. For maintenance purposes, only solutions that belong to the same Category Security Group can re-use the statements that are within the same Category Security Group.

When knowledge workers search for statements, the system filters their results by whether or not the statement belongs in the same Category Security Group and also the Visibility Level of the statement itself.

## **Solution Security Relationships**

The following topics describe and show the relationships among various components of

Solution Security:

- Relationships Between Visibility Levels and Users, Categories, Solutions, and Statements, page 14-6
- Relationships Between Categories, Visibility, and Category Security Groups, page 14-7
- Relationships Between Responsibilities and Category Security Groups and User Access, page 14-8

### **Relationships Between Visibility Levels and Users, Categories, Solutions, and Statements**

Visibility Levels are on a linear scale. At one end of the scale, the visibility is very restrictive--such as Internal. At the other end of the scale, the visibility is open or less restrictive--such as External.

#### **Category, Solution, and Statement Visibility Levels**

Categories, solutions, and statements all have a Visibility attribute. Whereas the Visibility Levels for solutions and categories are extensible, the Visibility Levels for statements are **not** extensible. The seeded Visibility Levels for statements are **Internal** and **External**. You cannot create or delete Visibility Levels for statements. The seeded Visibility Levels for categories and solutions are **Internal** and **External**. You can create or delete additional Visibility Levels for categories and solutions.

For more information, see also Set Up and Maintain Visibility Levels, page 14-9.

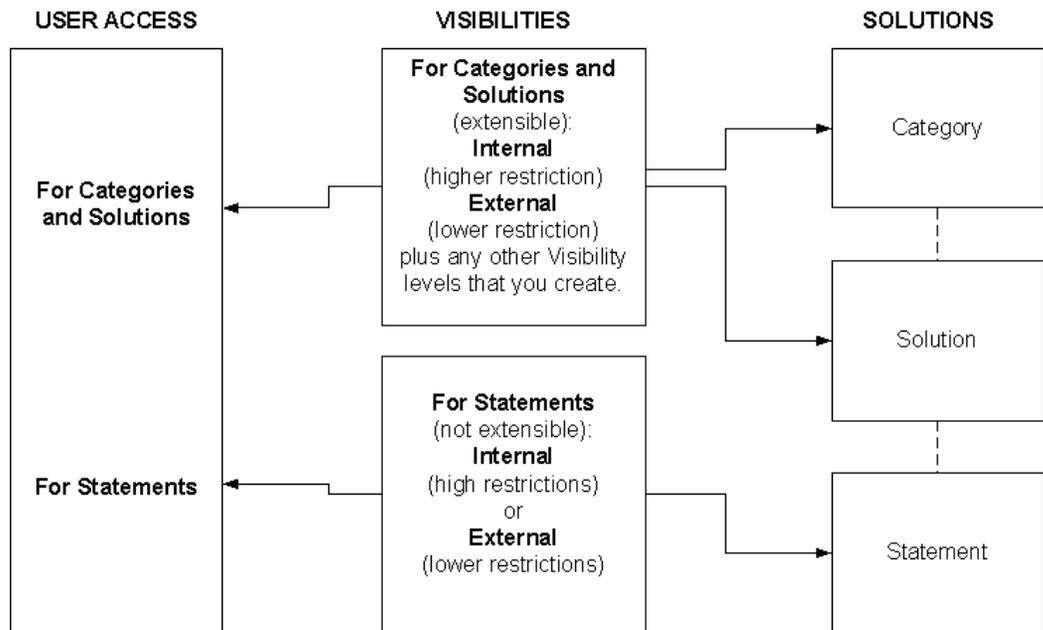
#### **User Visibility Levels**

You assign users Visibility Levels by way of two profile options: one for statements and one for categories and solutions. The assignment of Visibility Levels to a user means that the user can see any solution, category, or statement that has that Visibility Level or a less restrictive level.

The following diagram shows the relationships between Visibility and:

- Users
- Categories, Solutions, and Statements

### Visibility with Users, Categories, Solutions, and Statements



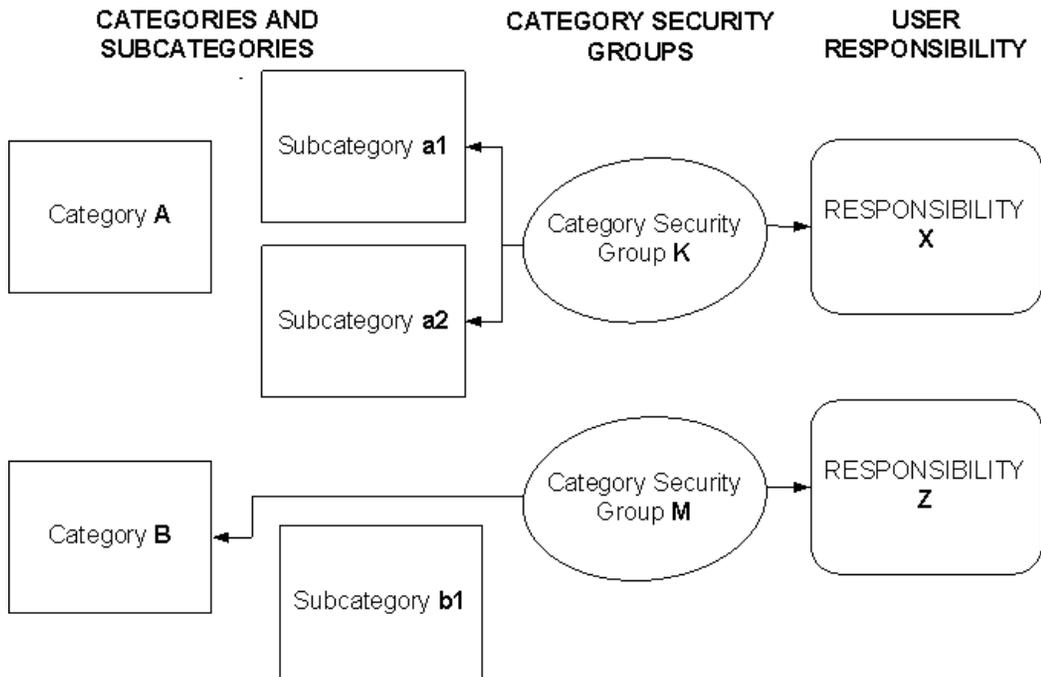
### Relationships Between Categories, Visibility, and Category Security Groups

The following diagram shows the relationships between categories and **Category Security Groups** (category views):

- An association between Category Security Group **K** and Subcategories **a1**, and **a2**, but **not** category **A**. A user with Security Group **K** sees only subcategories **a1** and **a2**.
- An association between Category Security Group **M** and category **B**. A user with Category Security Group **M** access sees category **B** and all subordinate categories that branch from category **B**, such as subcategory **b1**.

**Note:** Oracle Knowledge Management always displays the highest node in the category hierarchy that you have selected. For example, if you first associate subcategory **b1** to Category Security Group **M**, and then you associate parent category **B** to Category Security Group **M**, then parent category **B** replaces subcategory **b1** in the display of categories.

### Categories and Category Security Groups

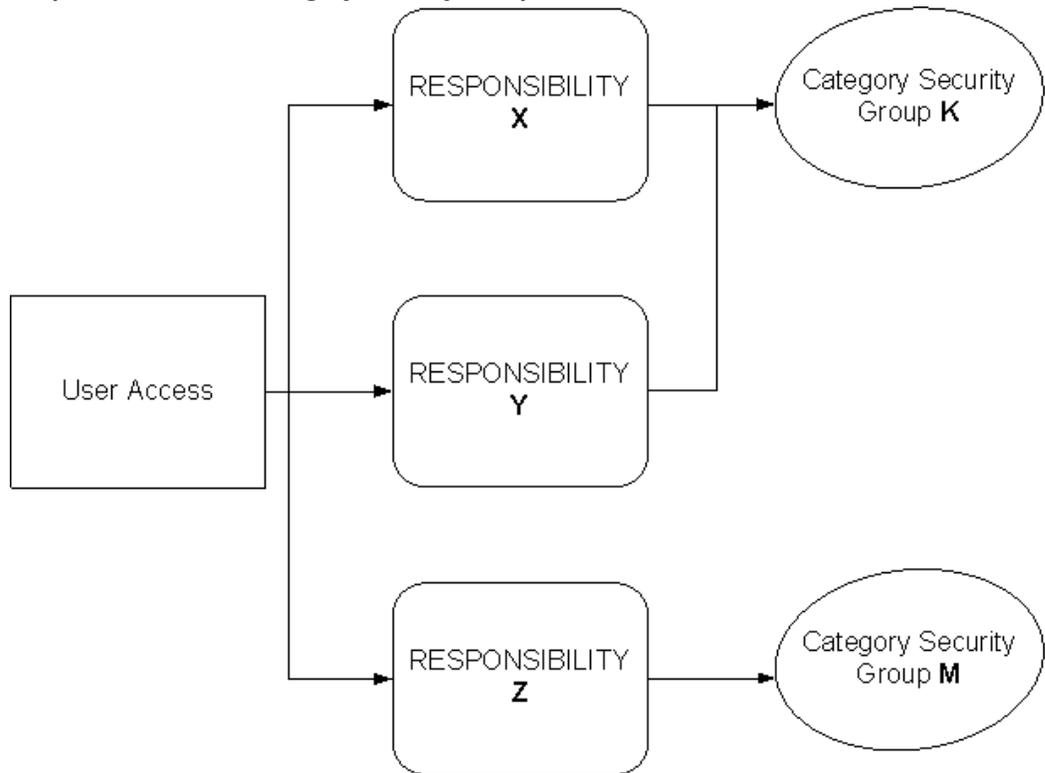


### Relationships Between Responsibilities and Category Security Groups and User Access

The following diagram shows relationships between Responsibilities and:

- **Category Security Groups:** You can associate a Category Security Group to one or more Responsibilities. However, you can associate only one Category Security Group to a Responsibility. The following figure shows that both Responsibilities **X** and **Y** have an association with Category Security Group **K**, but each Responsibility has only one association with a Category Security Group.
- **User Access:** You can assign as many Responsibilities as you want to a user, but there is only one single active Responsibility at a time for a given user. When the user logs on, the user selects which Responsibility to activate among all the Responsibilities assigned to him or her. Through the profile option setup, you can assign one set of Visibility Level values per Responsibility. For example, if the user has two Responsibilities **X** and **Y**, it is possible to assign the user:
  - External statements and external solutions and categories for Responsibility **X**.
  - Internal statements and internal solutions and categories for Responsibility **Y**.

### ***Responsibilities with Category Security Groups and User Access***



## **About Changing Security Settings**

Changes to the Security settings—for example, adding or removing categories from Category Security Groups or adding a new Visibility Level—impact the index that Oracle Knowledge Management uses for searches. For example, if you assign a category that has a lot of subcategories and solutions to a Category Security Group, a user who belongs to that Category Security Group can access a lot of data. When these changes occur, the user cannot search for it immediately. Only after the background concurrent requests complete their tasks can the user search for the data.

## **Set Up and Maintain Visibility Levels**

When you can create a new Visibility Level, you must decide where it fits in the hierarchy of other Visibility Levels. You must plan your Visibility Levels in a linear manner in terms of sensitivity, from **low sensitivity with high access** to **high sensitivity with low or restricted access**.

In its simplest form, you might have only two Visibility Levels:

**Internal:** For more sensitive material that should be available only internally to your company and your employees.

**External:** For less sensitive material that is available to customers or the public.

### Navigation

Setup > Security > Visibility Levels

### Notes

- When you create new Visibility Levels, you place the new Visibility Level above or below existing Visibility Levels.
- You cannot create duplicate Visibility Level names.
- After you create Visibility Levels, you assign Visibility Levels to users, categories, solutions, and statements.

## Set Up and Maintain Category Security Groups

Topics in this section include:

- About Category Security Groups, page 14-10
- About Organizing Category Security Groups, page 14-11
- Create a Category Security Group, page 14-12
- Update a Category Security Group, page 14-13
- Delete a Category Security Group, page 14-14

### About Category Security Groups

**Category Security Groups** are defined views of categories that determine whether or not a particular user can access a category, solution, and statement. Category Security Groups are subsets of the master category hierarchy and represent subject areas. After you--the administrator--define the master category hierarchy, you must also define the views--the Category Security Groups--of the master category hierarchy.

You associate Category Security Groups with:

- **Categories and subcategories:** To indicate which categories and subcategories that a user can view. When you create Category Security Groups, you specify which categories to include.

For more information, see [Create a Category Security Group, page 14-12](#).

- **Responsibilities:** To indicate which users can see which categories. You can associate a Category Security Group to one or more Responsibilities, but you can associate only one Category Security Group to a Responsibility. When you define

Responsibilities, you associate a Category Security Groups with them. The Responsibility with which a user logs on to the module determines which Category Security Group to use for accessing the knowledge base.

### About Category Setup

You set up a master category hierarchy at the time of implementation. The definition of categories and the master hierarchy need to be flexible enough to represent subject areas, products, structure of the company, and so on. Typically, you maintain and modify the master category hierarchy over time. You can add, edit and delete categories as required.

For more information, see *Managing Categories*, page 11-1.

### About Organizing Category Security Groups

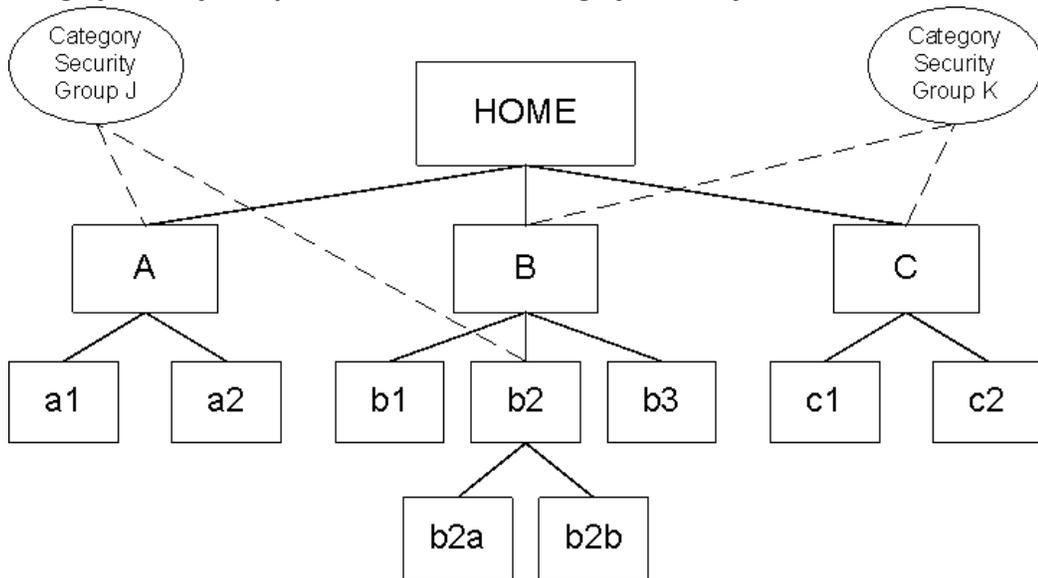
After creating the master category, you--the administrator--define Category Security Groups, which are **category views** that users have of the knowledge base. Category Security Groups are subsets of the master category hierarchy. Although the master category hierarchy includes a root Home category, you cannot include the root Home category in your Category Security Group. Instead, each Category Security Group has becomes its own **virtual Home**, which varies according to the selected categories.

The following figure shows a sample layout of a master category hierarchy with two Category Security Group views, **J** and **K**.

For example, Category Security Group **J** contains parent categories **A** and **b2**. Users whose Responsibility is associated with Category Security Group **J** can see only those categories and subcategories of **A** and **b2**, which includes **a1**, **a2**, **b2a**, and **b2b**. These same users cannot see categories **B**, **b1**, **b3**, or anything in category **C**.

Similarly, Category Security Group **K** contains categories **B** and **C**. Users whose Responsibility is associated with Category Security Group **K** can see only those categories and subcategories of **B** and **C**, but nothing in category **A**.

### Category Security Group Views of the Master Category Hierarchy



## Create a Category Security Group

The following procedures describe to create a new category security group. You can also Update a Category Security Group, page 14-13 and Delete a Category Security Group, page 14-14.

### Prerequisites

You have set up categories.

### Navigation

Setup > Security > Category Groups

### Steps

1. Click Create Group.
2. Enter Name (required) and Description (optional).
3. Click the Related Categories tab.
4. To associate categories with the Category Security Group, click the Include Category button.
5. Expand the navigation tree, select the check box of each category or subcategory that you want to apply to the Category Security Group.

You can select one or more categories and subcategories. If you want to specify **all** subcategories of a category, then select only the parent category. If you want to

specify only specific subcategories but not the parent category or other subcategories, then expand the parent category and select only specific subcategories.

6. Click the Apply button.
7. To add related authoring flows, click the Related Flows tab.
8. Click the Include Authoring Flows button.

For more information about authoring flows, see *Managing Authoring Flows*, page 12-1.

9. Select one or more authoring flows that you want to associate with the Category Security Group.
10. Click the Apply button.

## Update a Category Security Group

After you have created a Category Security Group, you can update it to change the name, description, related category, or authoring flow.

### Navigation

Setup > Security > Category Groups

### Steps

1. The Category Security Groups page displays a list of Category Security Groups.
2. On the row of the Category Security Group that you want to update, click the Update icon.

The Update Category Security Group page appears.

3. To remove a category, click the Remove icon.
4. To add related categories, click the Include Category button.
5. Expand the navigation tree, select the check box of each category or subcategory that you want to apply to the Category Security Group.

For more information, see Steps 4 and 5 in *Create a Category Security Group*, page 14-12.

6. To update related authoring flows, click the Related Flows tab.
7. To remove an authoring flow, click the Remove icon on the row that lists the flow.

8. To add authoring flows, click the Include Authoring Flows button.  
The Include: Authoring Flows page appears.  
For more information about authoring flows, see *Managing Authoring Flows*, page 12-1.
9. Select one or more authoring flows that you want to associate with the Category Security Group.
10. Click the Apply button.

## Delete a Category Security Group

You (the administrator) can remove a Category Security Group only if no authoring flows or categories are associated with the Category Security Group. Removing a Category Security Group does not affect the categories within the group. That is, removing a Category Security Group does not remove any categories. However, if you have associated any categories with the Category Security Group, you must disassociate them from the Category Security Group.

Also, when you remove a Category Security Group, the Responsibility that you had associated with the Category Security Group no longer applies to that Category Security Group. When anyone with that formerly associated Responsibility attempt to log on to Oracle Knowledge Management, an error message appears.

The following procedures describe how to:

- Disassociate categories from a Category Security Group.
- Delete a Category Security Group.

### Navigation

Setup > Security > Category Groups

### Steps

The Category Security Groups page displays a list of Category Security Groups.

1. On the row of the Category Security Group that you want to update, click the Update icon.  
The Update Category Security Group page appears.
2. On each row where a category appears, click the Remove icon.  
The category disappears. You must remove every category before you can delete the Category Security Group.
3. After you have removed all categories from the list, click the Apply button.  
The Category Security Groups page appears.

4. On the row that lists the flow that you want to delete, click the Delete icon.  
A confirmation messages asks you to if you are sure that you want to delete the Category Security Group.

5. Click the Yes button.

**Note:** If you had associated the deleted Category Security Group with a Responsibility, those users with that Responsibility will receive an error message when they try to log on. You should consider assigning another Category Security Group with that Responsibility.



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## Managing Autolinks

This chapter covers the following topics:

- Create or Update Autolinks
- Assign Autolinks to Contexts
- Example of Creating an Autolink to a Solution
- Preview Autolinks

### Create or Update Autolinks

Autolinks define a set of special keyword pattern words, for example, **bug**, that maps to an HTML context in the database. If the word **bug** has been created as an autolink, then when you author a solution that contains **bug** and a unique parameter--such as the bug number, for example **bug: 10020**--Oracle Knowledge Management automatically creates a hyperlink to that context in the database.

Autolinks let you create links automatically to other contexts in the application, which is useful in building a knowledge base where there is linked information.

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

**Note:** For statement details with content type **HTML with Autolink**, you can use these characters as the preceding or following characters. If you create the statement details using the Rich Text Editor, then add the > character in the keyword pattern Preceding Characters field and the < character in the Parameter Following Characters field to enable the New Line delimiting character. The Rich Text Editor automatically generates HTML tags to wrap around each paragraph that you type in the editor.

**Note:** It is highly recommended that if you want to render a URL keyword pattern as hyperlink, you should use the **HTML** content type--such as **HTML with Autolink**--rather than the **Text** content type.

#### Notes

- The keyword pattern Value is required but need not be unique. This supports the same keyword pattern being routed differently through different autolinks.
- Preceding Characters distinguishes your keyword pattern Value from identical text values, and Following Characters determines where the hyperlink stops.
- You need to create a function in Forms only if you choose Function for the type and the function is not available from the search list. For more information on how to create a function, see the *Oracle Applications System Administrator's Guide*.
- For a keyword pattern used in agent pages, if the autolink is the Function type, then the function definition must include `&cskDLink=OA`.
- For customer pages, if the autolink is the Function type, then the function definition must *not* include `&cskDLink=OA`.
- If the autolink is Function type, the Function type must be INTEROPJSP.
- A function definition used by an autolink must *not* contain "param=" at the end of its HTML call. If the URL needs to have a dynamic parameter value appended to it, then the proper procedure is to set the Destination Parameters field for an autolink.

## Assign Autolinks to Contexts

#### Notes

When upgrading from a release of Oracle Knowledge Management prior to release 11.5.10, be aware of the following:

- Because agents and customers have different sets of autolinks in this release compared to previous releases where they had the same set of autolinks, you must map autolinks that you defined before the upgrade to a new context, Service Provider, if you want agents to share the same rules. The current release does not automatically remap existing rules.
- For rules that use FND function, the Function type must be of INTEROP JSP type.

## Example of Creating an Autolink to a Solution

To create an autolink to a solution, you can define the following:

### Setting Up an Autolink to Access a Customer View Solution Page

1. Define the function:
  1. Function type = "JSP INTEROP"
  2. HTML call = "csksxvm.jsp"
2. Create an autolink to a JTT view solution page:
  1. Destination Type = "Function"
  2. Destination Parameters = "nSetNumber"

### Setting Up an Autolink for an OA View Solution Page

1. Define the function:
  1. Function type = "JSP INTEROP"
  2. HTML call = "  
OA.jsp?page=/oracle/apps/cs/knowledge/solution/search/webui/SolViewPG&cs  
kDLink=OA"
2. Create an autolink for a dynamic link to an OA view solution page:
  1. Destination Type = "Function"
  2. Destination Parameters = "cskSolNum"

## Preview Autolinks

With this page you can test the effects of an autolink for text for a given context. You can select a subset of links to test. This page shows how the autolinks are applied and the log list of possible errors in the text that prevent the link to be rendered.



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## Seeded Information

This appendix covers the following topics:

- Roles
- Permission
- Online Help Targets
- Generic Online Help Page

### Roles

CS\_SYSTEM\_ADMIN is the only role in Oracle Knowledge Management. This is a required role that you assign to users who are Oracle Knowledge Management system administrators. For other Oracle Knowledge Management users, see Access Control, page 3-1 to set up the access.

For users, such as customers, refer to the *Oracle iSupport Implementation and Administration Guide* for the roles to use.

For information on permission that Oracle Knowledge Management uses, see Permission, page A-1.

### Permission

The following table, page A-1 shows Oracle Knowledge Management's permission names and descriptions.

### **Oracle Knowledge Management Permission**

---

<b>Permission</b>	<b>Description</b>
CS_Advanced_Search	Knowledge: Search: Permission to view the Oracle Knowledge Management Advanced Solution Search window
CS_Solution_View	Knowledge: Search: Permission to view solution
CS_Solution_View_Internal	Permission to see the comments of the solutions.
CS_Assoc_Ext_Obj_To_Sol	Knowledge: Authoring: Permission to attach external objects to a Statement Type.
CS_Solutions_Comments_Add	Knowledge: Authoring: Permission to add solution comments
CS_Freq_Used_Def_View	Knowledge: Setup: Permission to view frequently used solution definitions
CS_Freq_Used_Def_Update	Knowledge: setup: Permission to update frequently used solution definitions
CS_Types_View	Knowledge: Setup: Permission to view Solution and Statement Types setup windows
CS_Types_Edit	Knowledge: Setup: Permission to edit solution and Statement Types
CS_Workflow_Setup_Update	Knowledge: Setup: Permission to update solution authoring workflow setup
CS_Worflow_Setup_View	Knowledge: Setup: permission to view solution authoring workflow setup windows

---

## **Online Help Targets**

The following table shows the online help targets for pages in Oracle Knowledge Management. Use the targets in the help pages whose text you want to modify.

**Online Help Targets in Oracle Knowledge Management**

<b>Ref</b>	<b>Page Title</b>	<b>Help Target</b>	<b>Help Resolution</b>
1.	Knowledge: Browse by subject	CS_SolBBrowsePG	The target is placed in the generic page.
2.	Knowledge: Simple Search Results	CS_SolBSearchResultPG	The target is placed in the generic page.
3.	Solution [Number]  Published  Draft  Read Only	CS_SolViewPG	The target is placed in the generic page.
4.	Related Solutions (stmt details)	CS_StmtViewPG	The target is placed in the generic page.
5.	Forum	CS_ForumMessageViewPG	The target is placed in the generic page.
6.	Categories	Same as 1	The target is placed in the generic page.
7.	Knowledge: Advanced Solution Search	CS_AsearchCrPG	The target is placed in the generic page.
8.	Knowledge: advanced Solution Search Results	CS_AsearchRePG	The target is placed in the generic page.
9.	Results: Matching Statements  (both advanced search flow and authoring flow)	CS_MatchingStatementPG	The target is placed in the generic page.
10.	Results: Related Statements	CS_RelatedStatementPG	The target is placed in the generic page.

<b>Ref</b>	<b>Page Title</b>	<b>Help Target</b>	<b>Help Resolution</b>
11.	Solutions in Progress	CS_SIPMainPG	The target is placed in the generic page.
12.	Search Solutions in Progress	CS_SIPMainPG	The target is placed in the generic page.
13.	Create Solution	CS_SolUpdatePG	The target is placed in the generic page.
14.	Update Solution	CS_SolUpdatePG	The target is placed in the generic page.
15.	Preview Solution	CS_SolPreviewPG	The target is placed in the generic page.
16.	Select: Authoring Flow	CS_FlowSelPG	The target is placed in the generic page.
17.	Select: Authoring Flow Step	CS_StepSelPG	The target is placed in the generic page.
18.	Statement [Number]  (include advanced search flow, authoring flow and statement search flow)	CS_StmtViewPG	The target is placed in the generic page.
19.	Create Statement	CS_StmtUpdatePG	The target is placed in the generic page.
20.	Update Statement	CS_StmtUpdatePG	The target is placed in the generic page.
21.	Import Text	CS_StmtUpdatePG	The target is placed in the generic page.
22.	Review Authoring Comment	CS_CommentsReviewPG	The target is placed in the generic page.

<b>Ref</b>	<b>Page Title</b>	<b>Help Target</b>	<b>Help Resolution</b>
23.	Authoring Comment	CS_CommentsReviewPG	The target is placed in the generic page.
24.	Create Authoring Comment	CS_CommentsCreatePG	The target is placed in the generic page.
25.	Apply Task Group Template	CS_ApplyTaskTemplateGroupPG	The target is placed in the generic page.
26.	Categories	CS_CategorySetupPG	The target is placed in the generic page.
27.	Create Categories	CS_CategoryDetailsPG	The target is placed in the generic page.
28.	Update Categories	Same as 33	The target is placed in the generic page.
29.	Category Security Groups	CS_CategoryGroupSetupPG	The target is placed in the generic page.
30.	Update Category Security Group	CS_CategoryGroupSetupPG	The target is placed in the generic page.
	Related Categories		
	Related Authoring Flows		
31.	Visibilities	CS_VisSetUpMainPG	The target is placed in the generic page.
32.	Create Visibility Level	CS_VisSetUpDetailsPG	The target is placed in the generic page.
33.	Update Visibility Level	CS_VisSetUpDetailsPG	The target is placed in the generic page.
34.	Recommended Solutions	CS_RecSolutionsPG	The target is placed in the generic page.

<b>Ref</b>	<b>Page Title</b>	<b>Help Target</b>	<b>Help Resolution</b>
35.	Add Recommended Solution	CS_AddRecSolutionsPG	The target is placed in the generic page.
36.	Subscriptions	CS_AuthProfPG	The target is placed in the generic page.
37.	Statement Search	CS_AdminStmtSearchPG	The target is placed in the generic page.
38.	Match Statement (for authoring only)	CS_StmtMatchPG	The target is placed in the generic page.
39.	Mapping Contexts	CS_ContextSetupPG	The target is placed in a unique page.
40.	Manage Repositories	CS_RepositorySetupPG	The target is placed in a unique page.
41.	Create/Update Autolink	CS_AutolinkDetailsPG	The target is placed in a unique page.
42.	Autolink Usage	CS_AutolinkUsagePG	The target is placed in a unique page.
43.	Preview Autolinks	CS_AutolinkPreviewPG	The target is placed in a unique page.
44.	Move Categories	CS_CategorySetupMovePG	The target is placed in the generic page.
45.	Move Solutions	Same as 44.	The target is placed in the generic page.
46.	Browse Categories	CS_CategorySetupChooseSolPG	The target is placed in the generic page.
47.	Solution [Number]	CS_SolViewPG	The target is placed in the generic page.

## Generic Online Help Page

Due to self-explanatory and highly configurable user interfaces in this release of Oracle Knowledge Management, the application provides no PDF book or online help for end users. The application also provides no documentation for other self-explanatory pages. Consequently, all help calls for such pages go to a single generic page that contains this text. Customers can customize online help for these pages by using the table of online help targets in the *Oracle Knowledge Management Implementation and Administration Guide*.



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## Profile Options

This appendix covers the following topics:

- About this Appendix
- Before You Begin
- Overview of Setting Profile Options
- Set Up Profile Options
- List of Profile Options

### About this Appendix

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

### Before You Begin

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

### Overview of Setting Profile Options

Profile categories, or hierarchy types, enable system administrators to group and set profile options according to their business needs or the needs of the installation. You can view and set a profile option at the levels of its hierarchy type. As a system administrator, you can use the System Profile Values window in Oracle Applications Forms to set up profile options for your user community. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities, and bounce the apache server. When you set up a user profile, you

provide Oracle Applications with standard information (such as printer) that describes a user, Responsibility, application, or site. You can set up values for user profile options at each of the following **profile levels**.

- **Site:** Option settings pertain to all users at an installation site.
- **Application:** Option settings pertain to all users of any Responsibility associated with the application.
- **Responsibility:** Option settings pertain to all users currently signed on under the Responsibility.
- **User:** Option settings pertain to an individual user, identified by their application user name.

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

When you can set a profile option at more than one level, the priorities from lowest to highest are:

- Site has the lowest priority.
- Application supersedes Site.
- Responsibility supersedes Application.
- User has the highest priority.

For example, values at the Application, Responsibility, or User levels can override a value at the Site level. A value at the User level has the highest priority and overrides values at any other level.

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

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

The options specified at the site-level work as defaults until the same options are specified at other levels. Application users can use the Personal Profile Values window to set their own personal profile options at the user level. Not all profile options are visible to users. End-users might not be able to update some visible profile options. For more information about profile options, see the *Oracle Applications System Administrator's Guide*.

## Set Up Profile Options

The following procedure describes how to set up any profile option.

### Module

Oracle Applications Forms

### Responsibility

System Administrator Responsibility

### Prerequisite

None

### Navigation

Profile > System...Find System Profile Values window

### Steps

1. Select the levels at which you want to set the profile option. The available levels include:
  - Site.
  - Application: If you select this level, then choose the Application for which you want to set the profile option.
  - Responsibility: If you select this level, then choose the Responsibility for which you want to set the profile option.
  - User: If you select this level, then choose the User for whom you want to set the profile option.
2. In the Profile field, enter the profile name, such as Knowledge: Active Knowledge Base System, or a wildcard search criterion such as Knowledge%.
3. Click Find.

The System Profile Values form displays the results of your search.
4. Verify or set the profile option(s) at the levels that you selected.

## List of Profile Options

The following table shows the categories for the profile options in Oracle Knowledge Management.

**Profile Categories for Oracle Knowledge Management in the Service Component**

---

<b>Category</b>	<b>Profile Options</b>
Administration	Knowledge: Default Product Category Set
Administration	Knowledge: Display Platform Attributes throughout Knowledge Management
Authoring	Knowledge: Category assigned to Solutions created through third party application
Authoring	Knowledge: Character display format for Statement text
Authoring	Knowledge: Default Authoring Flow
Authoring	Knowledge: Default Solution Type for Authoring
Authoring	Knowledge: Default Solution Visibility Level
Authoring	Knowledge: Default Statement Content Type
Authoring	Knowledge: Default Statement Visibility Level
Authoring	Knowledge: Select Authoring Flow
Authoring	Knowledge: Statement display order on solution details
Integration	Knowledge: Pass all mapped notes to KM for solution searching and authoring
Integration	Knowledge: Search to display for integrating applications
Performance	Knowledge: Batch size of solutions to index
Search	Knowledge: Concurrent Search Mode for Simple Search
Search	Knowledge: Default Product Category Set
Search	Knowledge: Default Searching Method

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<b>Category</b>	<b>Profile Options</b>
Search	Knowledge: Display \"Using\" search option on advanced solution search
Search	Knowledge: Display \"Using\" search option on simple search
Search	Knowledge: Display Product Search Criteria
Search	Knowledge: Display Quick Find
Search	Knowledge: Display Search Related Solutions button on advanced solution search
Search	Knowledge: Display search results above the score
Search	Knowledge: Maximum number of search results to display
Search	Knowledge: Repositories to search across in simple search
Search	Knowledge: Search to display for integrating applications
Search	Knowledge: Simple search repository key
Search	Knowledge: Starting Category for Browsing Solutions
Search Effectiveness	Knowledge: Filter solutions with no product association from search results
Search Effectiveness	Knowledge: Ignore word match frequency in solution search results
Search Effectiveness	Knowledge: Index Content As Soon As Possible
Search Effectiveness	Knowledge: Percentage of usage weighting in solution search result score
Search Effectiveness	Knowledge: Search results score includes weighting from Product, Platform and category filters.
Search Effectiveness	Knowledge: Time period (in days) for solution usage aging.

Category	Profile Options
Search Effectiveness	Knowledge: Token used for \"Ignore match frequency\" profile option
Search Effectiveness	Knowledge: Trim extremities of usage score
Security	Knowledge: Assigned Category Security Group
Security	Knowledge: Assigned Statement Visibility Level
Security	Knowledge: Assigned Visibility Level
Usage & Feedback	Knowledge: Action for Negative Solution Feedback
Usage & Feedback	Knowledge: Action for Positive Solution Feedback
Usage & Feedback	Knowledge: Time period (in seconds) for user activity log

The following table shows the profile options that are available in Oracle Knowledge Management.

***Profile Options for Oracle Knowledge Management***

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Action for Negative Solution Feedback	Determines what action to take for Solutions that are linked in a negative status.	Link Solution as Not Solved
Knowledge: Action for Positive Solution Feedback	Determines what action to take when Solutions are considered to be Useful.	Link Solution as Solved

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Assigned Category Security Group	Determines the Category Security Group that a user can access. You can set this profile option up to the Responsibility level. This profile controls which categories, and therefore solutions, that the user can access. The possible values for this profile depend on the Category Security Groups that the administrator defined in the Setup windows.	Default Category Group
Knowledge: Assigned Visibility Level	Indicates the most restrictive Visibility of solutions or categories that a user can access. You can set this profile option up to the Responsibility level. Visibility is an indication of the sensitivity of the content. The possible values for this profile depend on the Visibilities that the administrator defined in the Setup windows. The seeded values are External and Internal.	See Security Settings for seedings at different application and Responsibility levels.

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Assigned Statement Visibility Level	Indicates the most restrictive Visibility of statements that a user can access. You can set this profile option up to the Responsibility level. Statement Visibility is an indication of the sensitivity of the statement content. The possible values for this profile are External or Internal.	See Security Settings for seedings at different application and Responsibility levels.
Knowledge: Batch size of solutions to index	Determines how many solutions it should synchronize at one time.	300
Knowledge: Category assigned to Solutions created through third party application	Category assigned to solutions that were created through the API <b>CS_KNOWLEDGE_PUB.Create_Set_And_Elements</b> .	
Knowledge: Character display format for Statement text	Specifies the font style (class name of the style sheet) for text content type data, which includes both Text type and Text with Autolink type. Applies only to statement details. Allows setting the text data to render in the same style as HTML data. This profile can be set to one of the values in the style sheet. For the location of the style sheet, please refer to the <i>Oracle Application Framework Personalization Guide</i> .	OraFieldText

<b>User_Profile_Option_Name</b>	<b>Description</b>	<b>Default Profile Value</b>
Knowledge: Concurrent Search Mode for Simple Search	<p>Sets Simple Search to search all repositories concurrently if set to <b>Yes</b>.</p> <p>Recommended setting for this profile is <b>Yes</b>.</p> <p>Applies only to customer pages.</p>	Yes
Knowledge: Default Authoring Flow	Sets the default authoring flow to which solutions are submitted.	
Knowledge: Default Product Category Set	Determines the Product Category set used from Inventory.	
Knowledge: Default Searching Method	Sets the default searching method in the Simple Search. The Possible Values for the Searching methods are: All of the Keywords, and Any of the Words.	All of the Words
Knowledge: Default Solution Type for Authoring	Sets the default Solution Type used in Solution authoring.	Symptom Cause Action
Knowledge: Default Solution Visibility Level	Stores the default solution Visibility when users create a new solution. If the user's assigned Visibility is not as restrictive as the default in this profile, the most restrictive Visibility that the user can access is used instead.	External

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Default Statement Content Type	Stores the default statement content type when users create a statement. By default, this is HTML type, and the Rich Text Editor should appear on the Create Statement page. The lookup type CS_KB_CONTENT_TYPE defines the possible values.	HTML
Knowledge: Default Statement Visibility Level	Sets the default Visibility when you create a new statement. Formerly known as Knowledge: Default Distribution Level.	External
Knowledge: Display Platform Attributes throughout Knowledge Management	Controls if platform attribute appears on the View Solution and Advanced Solution Search pages. Applies only to customer pages.  <b>Note:</b> In agent pages (OA), you control this through Personalization.	Yes
Knowledge: Display Product Search Criteria	Controls display of the product criteria. Can display product name or description in the format of a list of values or a list. Applies only to customer pages.  <b>Note:</b> In agent pages (OA), you control this through Personalization.	Name

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Display Quick Find	Controls whether or not the Quick Find bar appears in Oracle Knowledge Management.  Applies only to customer pages.	No
Knowledge: Display Search Related Solutions button on advanced solution	Controls whether or not the Search Related Solutions button appears in the Advanced Solution Search. Applies only to customer pages.  <b>Note:</b> In agent pages (OA), you control this through Personalization.	No
Knowledge: Display search results above the score	Filters search results that are below this score. Applies to the Simple Search and Advanced Solution Search. List of values includes: 1, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100.	1
Knowledge: Display "Using" search option on advanced solution Search	Controls whether or not the Using search options appears in the Advanced Solution Search. Applies only to customer pages.  <b>Note:</b> In agent pages (OA), you control this through Personalization.	No

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Display "Using" search option on simple search	Controls whether or not the Using option appears in the Simple Search. Applies only to customer pages.  <b>Note:</b> In agent pages (OA), you control this through Personalization.	Yes
Knowledge: Filter solutions with no product association from search results	Controls whether the system filters from the search results solutions that have no associated product.	No
Knowledge: Ignore word match frequency in solution search results	Turns on the feature to ignore the word frequency in score calculation.	Yes
Knowledge: Index Content As Soon As Possible	Allows updated solutions or statements to be searchable within a short time after creation or being updated.	No
Knowledge: Maximum number of search results to display	Defines the maximum number of search results to appear in the search results. Replaces the profile option Knowledge: Knowledge Base Search: Maximum Number of Search Results.	200

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<b>User_Profile_Option_Name</b>	<b>Description</b>	<b>Default Profile Value</b>
Knowledge: Pass all mapped notes to KM for solution searching and authoring	Determines whether or not to automatically pull notes that are mapped to valid Statement Types when a user navigates to Advanced Solution Search or Create Solution from the Simple Search during an integration flow.	Yes

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User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Percentage of usage weighting in solution search result score	<p>Defines how much the usage score should contribute to the displayed score. The default value is 0, which means that the usage score is not included in the score calculation.</p> <p>Textual relevance always determines the search results first. The process then takes and re-sorts the top-scoring (pure text score) X documents--where X is a number that the profile Knowledge: Maximum number of search results to display determined.</p> <p>Only the second re-sorting considers the Usage Score weight percentage. It is recommended to use a small single-digit percentage value for this profile. The process uses the value to differentiate search results having the same textual score. In combination, the process may typically use this value when you have turned on the <b>Knowledge: Ignore word match frequency in solution search results</b> profile option.</p>	0
Knowledge: Repositories to search across in simple search	Specify repositories to use in Simple Searches. Controls only customer pages.	Solutions

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Search results score includes weighting from Product, Platform and category filters	<p>Turning on this feature causes search criteria to not act as strict filters. Some search results might not match all of the specified criteria. Be aware that this profile impacts all the searches in Oracle Knowledge Management, including Simple Search.</p> <p>For example when you turn on this feature, searches that have specific product criteria will have search results that may not be linked to the selected product. However, the results that are linked to the product appear before the ones that are not related to the product.</p> <p>If this profile is turned on, the search ignores the value set in the following profile: <b>Knowledge: Filter Solutions with no product association from search results.</b></p>	No
Knowledge: Search to display for integrating applications	<p>Stores the search (Simple Search or Advanced Solution Search) to which users want to go from integration. Controls only agent (OA) pages. The lookup type CS_KB_UNI_ADV_SRCH defines the possible values.</p>	Simple Search

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Select Authoring Flow	<p>Controls whether user can select an authoring flow to submit the solution to during the solution authoring process.</p> <p>If this value is <b>No</b>, then the user cannot pick a flow, and the system sends all submissions to the default flow that the profile option Knowledge: Default Authoring Flow specifies.</p>	Yes
Knowledge: Starting Category for Browsing Solutions	<p>Specifies the default category for browsing when a user logs in. Applies to both agent and customer facing pages.</p>	
Knowledge: Statement display order on solutions details	<p>Controls the display of statements by either the order of creation or grouping by Statement Type.</p>	Position Order
Knowledge: Time period (in days) for solution usage aging	<p>Defines the time frame within which the different factors for solution usage would be used for usage score calculation.</p>	365
Knowledge: Time period (in seconds) for user activity log	<p>The time window to record user activity in Oracle Knowledge Management. A value of 0 indicates disabled tracking.</p>	0

User_Profile_Option_Name	Description	Default Profile Value
Knowledge: Token used for "Ignore match frequency" profile option	Stores the nonexistent key word. <b>Important!</b> You should not change this value.	"zyzyzy"
Knowledge: Trim extremities of usage score	Defines the confidence interval of all age-adjusted usage scores at a given critical value. <b>Important!</b> You should not change this value.	1.92



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## Lookup Types

This appendix covers the following topics:

- About this Appendix
- List of Lookup Types
- Query and Edit Lookup Types

### About this Appendix

This appendix describes how to query and configure lookup codes to Lookup Types in Oracle Applications Forms.

### List of Lookup Types

The following table, page C-1 lists the lookup types, tasks, and descriptions for Oracle Knowledge Management.

## Lookup Types

Lookup Type	Task	Description
CS_KB_STATUS	Configure the Solution Authoring Flow Status	<p>The CS_KB_STATUS lookup type is a fully customizable lookup type for Oracle Knowledge Management. You can add lookup codes to this lookup type. You can add or delete steps, or change the name of the existing steps. Upon searching this lookup type, a list of steps for solution authoring flows appear that you can enable.</p> <p><b>Important!</b> Use this lookup to configure authoring flow <b>step</b>, <i>not</i> the <b>status</b>.</p>
CS_KB_RTE_FONT_COLOR	Configure the Font Color for Rich Text Editor	<p>The CS_KB_RTE_FONT_COLOR lookup type lets you specify the font colors to use in the Rich Text Editor. This lookup type is user definable.</p> <p>The Search results show a list of font colors that users can choose when using the Rich Text Editor. The user can enable or disable the defined values or add more to the list.</p>

Lookup Type	Task	Description
CS_KB_RTE_FONT_LIST	Configure the Font List for Rich Text Editor	<p>The CS_KB_RTE_FONT_LIST lookup type lets you can specify the available fonts from which users can choose when using the Rich Text Editor. This lookup type is user definable.</p> <p>The Search results show a list of fonts that users can choose when using the Rich Text Editor. The user can enable or disable the defined values or add more to the list.</p>
CS_KB_USAGE_TYPE_WEIG HT	Configure the Usage Type Weighting for Search Effectiveness	<p>The CS_KB_USAGE_TYPE_WEIG HT lookup type provides a way for customers to instruct the system on how to compensate the usage score for a solution that has links to external objects and has received the user's feedback.</p> <p>This Usage Type Weight list is not extensible for the user, although the user can adjust the weighting.</p> <p>The Search results show a list of the weighting.</p>

Lookup Type	Task	Description
CS_KB_SCORE	Configure the Usage Type Weighting for Search Effectiveness	<p>The CS_KB_SCORE lookup type lists the available values for the Search Relevancy. In Search the profile Knowledge: Display search results above the score controls the results. This lookup defines the available values for this list.</p> <p>This lookup type is user definable.</p> <p>The Search results show a list of scores. You can enable or disable the defined values or add more to the list.</p>

## Query and Edit Lookup Types

The following procedures describe how to query and edit lookup types.

### Responsibility

Service

### Login

Log in to Oracle Applications Forms.

### Steps

1. Log in to Oracle Applications Forms as a System Administrator.

The Responsibilities form appears.

2. Switch the Responsibility to the **Service** Responsibility.

3. Navigate to Others > Service: Lookup.

The Oracle Service Lookups Form appears.

4. From the View menu, choose Find.

The Lookup Types window appears.

5. In the Find field, enter the Lookup Type name and click OK.

The search results vary according to the lookup type. The Lookup Types, page C-1 table shows some lookup types and descriptions, which include what you can

change.

**Note:** To search for all Oracle Knowledge Management lookup types, enter **CS\_KB**.

6. Click OK.
7. In the Enabled column, specify your changes.
8. From the File menu, choose Save.



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## Concurrent Programs

This appendix covers the following topics:

- List of Concurrent Programs

### List of Concurrent Programs

The following table, page D-1 shows the Concurrent Programs of Oracle Knowledge Management.

#### *Oracle Knowledge Management Concurrent Programs*

<b>Concurrent Program Name</b>	<b>Description</b>
Knowledge Management Calculate Solution Usage Score	Calculates the usage score of solutions for the Search Effectiveness Module.
Knowledge Management Category Index Synchronization	Synchronizes the Category Oracle Text index to enable Categories to be Searchable.
Knowledge Management Purge Tracking History	Purges temporary data stored in Oracle Knowledge Management tracking history.

Concurrent Program Name	Description
Knowledge Management Solution Export Program	<p>Exports solutions from Oracle Knowledge Management using the user specified criteria. The process saves the results in XML format in the concurrent programs <b>out</b> file. This concurrent program downloads the solutions based on the following criteria:</p> <ul style="list-style-type: none"> <li>• The category name from which the solutions must be downloaded.</li> <li>• The status of all the solutions in a category, for example, <b>Published</b> or <b>All</b>.</li> </ul>
Knowledge Management Solution Import Program	<p>Imports new solutions and updates existing solutions in Oracle Knowledge Management. It is a Java concurrent program that can upload multiple solutions. The solutions to be imported can either be new solutions or existing solutions with updates. This program uses the input XML file name (absolute path) and commit interval (how often to commit the import) parameters for running. The file must contain the solutions in a XML format and must be compliant with the Document Type Definition (DTD) for Oracle Knowledge Management, <b>cskb_solution.dtd</b>. This program verifies the validity of the input XML document. Each new solution to upload can either have a Saved status or be directly published, if the flow information is provided. Users can update only published solutions. These Solutions continue to have a Published status after the update. Attachments and external hyperlinks are not supported, but Statement Global Update is supported. Any statement with a statement number is globally updated according to the new data specified in the XML document. To see an example of a DTD file, see Sample File For Solution Import Program, page E-1.</p>
Knowledge Management Solution Index Synchronization	Synchronizes the Solution Oracle Text index to enable Published Solutions to be Searchable

Concurrent Program Name	Description
Knowledge Management Statement Cleanup	Obsoletes statements that are no longer associated to any solutions. This is a cleanup program to obsolete unused Statements.
Knowledge Management Statement Index Synchronization	Synchronizes the Statement Oracle Text index to enable Published Statements to be Searchable
Knowledge Management mark solutions for text re-indexing	Identifies and marks solutions for text re-indexing after security setup changes. After a Security change, such as adding a new Category to a Category Security Group, all solutions that are associated to the new Category require re-indexing to include this category.
Knowledge Management unlock stuck solutions	Unlocks solutions that users, who no longer have access to the solutions, have locked. For example, if the Administration user changes the security setup, a Knowledge Worker who is working on a solution after the Security change may no longer have access to that solution. This program therefore identifies the solutions that users have checked out, who no longer have access to the solutions, and unlocks these solutions.
Knowledge Management update solution used count	This Program is used internally to count the number of times a solution receive feedback as to its usefulness

## Index Management

Separate index synchronization programs are available for each index. The concurrent request set **Knowledge Management: index synchronization set** executes all the index synchronization programs at one time. A new parameter is available in each index synchronization program to allow building the index in parallel mode, which improves the efficiency of building the index. The index synchronization program includes the **DR build mode** that drops and recreates the Oracle Text index. This is a useful tool to use whenever index corruption occurs or when you need to recreate the index.

Here is more information regarding the build modes:

- # DR: Drop the index and recreate the index from scratch. Oracle does not recommend you use this mode during normal index synchronization. But in some

cases such as a corrupted index or a hanging indexing process, you may use this mode to force the index to be dropped and restore it. Be aware that this mode implies rebuilding the whole index and may a long time to complete. During the rebuilding process, it is impossible to preform search and updates on solutions.

- # OFAST Optimize Fast: This mode is mapped directly to the Optimize Fast mode of Oracle Text for index optimization. Optimization Fast compacts fragmented rows. However, old data is not removed.
- # OFULL Optimize Full: This mode is mapped directly to the Optimize Full mode of Oracle Text for index optimization. Optimization Full compacts rows and removes old data (deleted rows). It takes longer than the OFAST to complete.
- # Rebuild All: This mode rebuilds the entire index. It is similar to the DR mode except that it does not drop the index. Be aware that during the rebuilding process, it is impossible to perform search and updates on solutions.
- # Sync: Index synchronization. Normally this is the mode you should use to synchronize the index content after you create or update a solution. This mode does not block any DML operations on the table.

For details about build modes and optimization, consult *Oracle® Text Application Developer's Guide 10g*, which is available from the Oracle Technology Network (OTN).

#### **Related Concurrent Programs**

The administrator of Oracle TeleService runs a related concurrent program, Service Request Synchronize Index, which indexes service request notes and summary text. For details, see the *Oracle TeleService Implementation Guide*.

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## Sample File For Solution Import Program

This appendix covers the following topics:

- Example of a Solution File for the Solution Import Program

### Example of a Solution File for the Solution Import Program

The Oracle Knowledge Management Solution Import Program uses the input XML file name (absolute path) and commit interval (time intervals for committing the import) parameters for running. The file must contain the solutions in an XML format and must be compliant with the Document Type Definition (DTD) for Oracle Knowledge Management, `cskb_solution.dtd`.

The file must contain the solutions in a XML format and must be compliant with the Document Type Definition (DTD) for Oracle Knowledge Management (`cskb_solution.dtd`), which verifies the validity of the input XML document. If it is valid, the solutions are created, one after the other. If any data is invalid, the solutions are not created. If processing for a solution fails, its changes are rolled back, and a log error message is written, and the next solution in the file is imported. Each new solution to be uploaded can either have a Saved status or be directly published, if the flow information is provided. Users can update only published solutions. Attachments and external links are not supported but Statement Global Update is supported. Any statement with a statement number is globally updated according to the new data specified in the XML document.

For product and platform, you can optionally specify the segments attribute, which corresponds to the concatenated segments for that item. Once specified, the import program uses the **concatenated\_segments** to lookup the item (product or platform) in the system item master. If not specified, import program still uses the content of the product or platform element as description to lookup in the system item master.

```
<?xml version="1.0"?>
<!DOCTYPE solution_list SYSTEM "cskb_solution.dtd">
<solution_list>
<solution>
```

```

<solution_type> Symptom Cause Action</solution_type>
<solution_visibility>External </solution_visibility>
<title>Maria's Test Solution 1 (mchui061902b)</title>
<category>Home>12 World Cup>United States</category>
<product segments="PBD-001" >Passport Backup Drive</product>
<product>Windows NT (wrong)</product>
<platform segments="SSD">Sentinel Standard Desktop</platform>
<statement>
<statement_type>Symptom</statement_type>
<statement_distribution>External</statement_distribution>
<content_type>HTML with Autolink</content_type>
<summary>mchui061902b - symptom 1</summary>
<detail></detail>
</statement>
<statement_links>
<statement_no>10386</statement_no>
<statement_no>34</statement_no>
<statement_no>10650</statement_no>
</statement_links>
</solution>
<solution>
<flow>
<flow_name>Bayu Flow</flow_name>
Example of a Solution File for the Solution Import Program

```

Sample File For Solution Import Program E-3

```

<step>Public</step>
</flow>
<solution_type> Symptom Cause Action</solution_type>
<solution_visibility>External </solution_visibility>
<title>Maria's Test Solution 2 (mchui061902c)</title>
<category>Home>New Category>New Category 2</category>
<product>Windows NT</product>
<product>Windows NT</product>
<platform>windOWS 95</platform>
<statement>
<statement_type>Symptom</statement_type>
<statement_distribution>External</statement_distribution>
<content_type>Text with Autolinks</content_type>

```

```

<summary>mchui061902c - symptom 1</summary>
<detail>another imported statement - published</detail>
</statement>
<statement_links>
<statement_no>10387</statement_no>
</statement_links>
<statement_link_update>
<statement_no_upd>10386</statement_no_upd>
<statement_type_upd>Symptom</statement_type_upd>
<statement_distribution_upd>Internal</statement_distribution_upd>
<content_type_upd>HTML</content_type_upd>
<summary_upd>update existing statement summary</summary_upd>
<detail_upd>global update of statement CLOB</detail_upd>
</statement_link_update>
</solution>
<solution>
<solution_number>10419</solution_number>
<solution_type> Symptom Cause Action</solution_type>
<solution_visibility>Limited</solution_visibility>
<title>UPDATED Solution 1000003 yes (updated on 062102)</title>
<category>Home>New Category>New Category 2</category>
<product>Windows NT</product>
<platform>windOWS 95</platform>
<statement>
<statement_type>Symptom</statement_type>
<statement_distribution>External</statement_distribution>
<content_type>Text</content_type>
<summary>create new statement </summary>
<detail>new statement details</detail>
</statement>
<statement_link_update>
<statement_no_upd>10386</statement_no_upd>
Example of a Solution File for the Solution Import Program

```

#### E-4 Implementation Guide

```

<statement_type_upd>Symptom</statement_type_upd>
<statement_distribution_upd>External</statement_distribution_upd>
<content_type_upd>Text with Autolinks</content_type_upd>
<summary_upd>global update of statement</summary_upd>

```

```
<detail_upd>statement detail should be globally  
updated</detail_upd>  
</statement_link_update>  
</solution>  
</solution_list>
```

---

## Frequently Asked Questions

### Scoring in Searches

#### Question

What are the details of how search scoring works for solutions and service requests? I need information about how to improve the search effectiveness of text score and how to calculate normalized usage score. What are the profiles related to these elements?

#### Answer

The Oracle Knowledge Management Simple Search UI shows a set of tabs, each containing a search result for a particular repository such as Solutions, Service Requests, and Enterprise Search. It can also show search results for a custom created repository. Because each search result for a repository, that is, each tab on the UI, can be generated by different searching methods, no single search scoring algorithm is used across the application. For example, a default repository like Solutions uses Oracle Text, while an Enterprise Search repository delegates the search to an Oracle Enterprise Search server. Customers write repositories and use whatever method they choose to return the search results.

Most questions about the scoring algorithms specifically refer to out-of-the-box seeded repositories, particularly Solutions and Service Requests. Because Knowledge Management uses Oracle Text for searching on these repositories, the scoring generally inherits the Oracle Text scoring algorithm.

Some general guidelines about searching are as follows:

- Compare search scores for each search result row relative to each other, within a single search result set.
- Comparing the absolute score number across search result sets is not meaningful.
- The absolute score is not predictable and varies with the different search methods, whether the index has been optimized, and other factors. Therefore, one should not

focus on what the exact search score number is.

- In general, overall average scores are higher using the "Any of the words" search method as compared to "All of the words."

The following sections contains notes specific to each repository type, with respect to search.

Some specific information about scores follows:

- Display score uses the formula  $\text{Display score} = \text{Text score}(1-x/100) + \text{Normalized usage score}(x/100)$ , where x is a parameter (percentage) provided by the Knowledge Management administrator.
- Oracle Text calculates Text score at runtime.
- The Knowledge Management concurrent batch program calculates the Normalized usage score.

### Searches on Solutions

- Keyword Search: keyword criteria is matched against Solution title, statements (summary and detail), as well as the name and description of any items (products) associated with the solution.
- (Optional) Attribute filters: solution type, 1 or more products, platforms, and categories can act as search result filters.
- \* For product, platform, and category criteria, they can be selectively used strict filters or as influencing factors, depending on the profile option Knowledge: Search results score includes weighting from Product, Platform and category filters. If this option is turned on, then these attribute criteria do not behave as filters and just influence the scoring on solutions.
- \*\*As a filter: a solution must match the keyword criteria, as well as be associated to the products, platforms, and categories specified in the search criteria to qualify as a search result. Scoring is based entirely on the keyword match.
- \*\*As an influencing factor: a solution must match the keyword criteria to qualify as a search result. If it matches one or more product criteria, then it matches an additional factor. If it matches one or more platform criteria, then it matches yet another additional factor. If it matches one or more category criteria, then it adds another matched factor again. Solution results having the most matched factors rank higher, that is, have a higher score, than solutions that match fewer factors. Solutions results having the same number of matched factors are ranked according to keyword match relevancy.
- (Optional) Solution Usage influencing the score: Knowledge Management can be configured to have a solution's usage influence the overall score through the profile

option Knowledge: Percentage of usage weighting in solution search result score, whose default is 0%.

- \* The overall score is a combination of the text score and the usage score. The text score is the keyword match relevancy derived from Oracle Text. The usage score is described below. They are combined together in a percentage ratio based on the profile option:  $(\text{Text Score}) \times (100 - \text{Profile value}) + (\text{Usage Score}) \times (\text{Profile value})$ .

**Important:** Solution usage scores are incorporated **after** text match and thresholding happens. Basically the search first identifies which solutions match the text and attribute criteria and scores them according to text match relevancy. Then it takes the top N solutions, based on the text score **only**. The threshold, N, is controlled by profile option. **Then** the usage scores for those top N solutions are retrieved and combined, and finally the solutions are resorted based on the overall combined score. This means that a solution having a very high usage score but a low text relevancy match may not appear at all in the search result because it was filtered out by the top N threshold.

- \* Deriving the Usage Score: The usage score for solutions is calculated in the concurrent program Knowledge Management Calculate Solution Usage Score. The usage score is composed of a sum of a few different factors that are adjusted by age and then normalized from 0-100 across all solutions.

### Service Requests

- Keyword Search: Keyword criteria are matched against the service request summary and non-private notes including the full note detail.  
  
\* The keyword search method, "All of the keywords" or "Any of the keywords", is controlled by the Knowledge Management profile option Knowledge: Default Searching method.
- Product/item is used as a strict filter on the search results. If specified, then a service request must be filed for that specific product to qualify as a search result.  
  
**Note:** Internal API implementation note: If more than one product is specified, then the API uses only the last one and ignores the others.
- Score: This generally just follows the standard Oracle Text scoring.



---

# Glossary

## **Action**

An Oracle 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 Solution Search**

Advanced Solution Search is a more comprehensive search than Simple Search. You can search for solutions under different categories, products, or platforms. You can search one solution type or all, and search for statements. You can also select an existing statement in Oracle 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 must follow in the solution approval or rejection process.

## **Simple Search**

Simple Search is a type of search that lets you search for a solution and category 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**

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

**Autolink 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 prevents any further statements or solutions of this type from being created. Solutions or statements currently in progress are 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 or 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.

**Knowledge Base**

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

**Knowledge Worker**

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

**Merchant**

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

**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**

Oracle Knowledge Management evaluates the criteria to produce a score to present the best solution first. The scoring criteria include the number of times that a solution has: been linked to an external object and solved; been linked to external objects; received positive feedback; been viewed as a solution; or received negative feedback. 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 Knowledge Management is associated with a unique number. This search finds 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.

**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 or 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**

An Oracle 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.

**Unified Search**

Also known as a Simple Search. See **Simple Search**.

**User**

An Oracle 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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