Oracle® Knowledge Management

User's Guide

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Oracle Knowledge Management User's Guide, Release 12.2

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Oracle Knowledge Management User's Guide, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Knowledge Management User's Guide.*

Welcome to the Oracle Knowledge Management User's Guide.

This guide assumes you have a working knowledge of:

- The principles and customary practices of your business area.

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

- The Oracle Applications graphical user interface. To learn more about the Oracle Applications graphical user interface, see the *Oracle E-Business Suite User's Guide*.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

Related Information Sources

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.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications

and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and updated tasks.

Oracle Common Application Calendar User Guide

Oracle Common Application Calendar enables you to manage daily tasks and appointments, create and maintain notes, and schedule resources. It provides a central place to store and view resource schedules, utilization, and availability. It also enables you to synchronize your calendar with external calendars such as Microsoft Outlook or handheld devices.

Oracle Depot Repair Implementation Guide

For Oracle Depot Repair, you must first implement Oracle Contracts, Oracle HRMS, and the main modules of Oracle Financials, Supply Chain Management, and Service for Marketing and Sales. Then, use this guide to set up service activities for a replacement order of spares or a return for repair, service activity billing and install base transaction types, business processes, and labor schedules. This guide also describes how to set up customer profiles, repair types, repair type statuses, service request types, and codes for repair reasons, diagnostics, message actions, and service,

Oracle Depot Repair User Guide

Oracle Depot Repair targets the repair business market from simple, quick repairs to routine maintenance. The depot repair process includes the return of broken and

serviceable items, their diagnoses and repair job estimates, customer approvals and repairs management, and subsequent return of items to customers. It also supports customers that walk in at service depots for repair needs.You use the collection of charges for materials, labor, and expenses for the repairs to invoice the customer.

Oracle Email Center Implementation Guide

Oracle Email Center is a comprehensive solution for managing high volumes of inbound email. This guide describes how to set up separate accounts for emails from external and internal sources, create rules for predefined email processing rule types, enter keywords for email intent processing, create tags, and create queries to search for documents and templates in the integrated knowledge base repositories of Marketing Encyclopedia Systems (MES) and Oracle Knowledge Management.

Oracle Email Center User Guide

Oracle Email Center enables supervisors to categorize inbound emails from customers, partners, suppliers, and employees into different queues, tag them, create interaction threading, analyze intent, and balance workload while routing them to appropriate agents. It enables agents to respond to emails using system-generated suggested responses and standard templates and provides agents with a full featured console with cross application functionality. Integrated with Oracle Marketing, you can use Oracle Email Center to process campaign lists, expand the campaign content material, add tracking tags, send emails to addresses in the list, track responses and tie these into campaign effectiveness analysis.

Oracle Field Service Implementation Guide

This guide enables you to install and implement Oracle Spares Management, Oracle Advanced Scheduler, Oracle Inventory, Oracle Order Management, Oracle Service Contracts, Oracle Depot Repair, and Oracle Complex Maintenance, Repair and Overhaul for Preventive Maintenance. Integration with these applications is necessary to automate field service activities. In addition, you define codes to justify material, labor, and expense, define billing types and associate these with service activity codes and inventory items, and define skills and skill levels of field technicians. You can also define time-based and usage-based preventive maintenance programs, and forecast usage rates.

Oracle Field Service User Guide

Oracle Field Service enables the automation of field service operations such as scheduling and dispatching tasks to field technicians, ordering parts, and tracking task completion. You can use its debrief capabilities to access notes and interaction history in support of call closure, and report task execution time, parts and expenses.

Oracle iSupport Implementation and Administration Guide

Oracle iSupport enables service organizations to provide self-service support online to

customers, individual users, guest users, and employees. It reduces the number of calls coming into the contact center that require agent assistance. This guide describes how to integrating with Oracle E-Business Suite applications to enable customers review and track orders, payments, shipments, and contracts, manage their service request activity online, and solve problems by searching the knowledge base.

Oracle Knowledge Management Implementation and Administration Guide

Oracle Knowledge Management is an information management system that enables you to create information solutions, submit the solution to an authoring flow for review and edit, and create solution groups for browse and search convenience. This guide describes how you can set up knowledge repositories for a service provider or service requester and control access levels of users to categories, solutions, and to statements within a solution.

Oracle TeleService Implementation and User Guide

This guide provides information on how to use Oracle TeleService. Oracle TeleService automates the call center and the resolution process from the time a customer calls in, sends an email, or enters a service request on the Web. Agents can use Oracle TeleService to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve problems that arise from the initial contact using a knowledge base.

Oracle Trading Community Architecture Technical Implementation Guide

This guide provides technical information on the various integration features such as APIs and business events that you can avail to connect into external systems and transact data between these systems through a data hub using the Trading Community Architecture data model. This means that you can create or update in one system and ensure that the change is reflected in the other systems. You can manipulate data at the granular Oracle Trading Community Architecture entity level such as party site or party relationship or at the higher business object level such as person. Use this guide to learn about available APIs, their functions, parameters, and validations and how to use them. You can also find details on the business events and how to subscribe to them.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the

Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle E-Business Suite development staff. It describes the UI for the Oracle E-Business Suite products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed

includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing

Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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

Support

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

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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

Getting Started

This part contains the following chapters:

- Introduction, page 1-1

- Overview, page 2-1

1

Introduction

This chapter covers the following topics:

- Summary
- Key Features
- Integration

Summary

Oracle Knowledge Management is an information management system that uses knowledge capture, storage, and distribution tools that Oracle 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. Solution Security lets you manage who can view which information to help you manage the relative confidentiality and visibility of information.

Oracle Knowledge Management currently provides solution management functionality to other Oracle Applications modules, such as OracleiSupport, Oracle TeleService, Oracle Field Service, Oracle Depot Repair, and Oracle Email Center. The Oracle Knowledge Managementarchitecture supports diverse usage and integration with other Oracle modules.

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

- Integration With Other Oracle Applications, page 1-3

- Solution Management, page 1-3

- Agent Facing Flows in OA Framework, 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 in 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 is extensible.

Effective Text Searching

Oracle Knowledge Management integrates with Oracle Text to provide the text searching functionality. Oracle Knowledge Management allows users 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.

Simple Search lets you search for solutions and other useful information, such as Service Request and Forum 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.

Integration With Other Oracle Applications

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

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.

Agent Facing Flows in OA Framework

Oracle Knowledge Management agent pages use the OA framework. The look and feel of the application is consistent with the rest of the Oracle Applications. Oracle Applications provides better personalization support.

Solution Scoring

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. The maximum score is 100. Solution scores vary depending on the search method.

Solution usage recording for Oracle iSupport tracks your customers' access to solutions. Solution usage recording can assist customer service agents identify relevant solutions when they assist their customers.

Integration

Oracle Knowledge Management integrates with the following Oracle Applications modules:

- Oracle iSupport, page 1-4

- Oracle TeleService, page 1-5

- Oracle Depot Repair, page 1-5

- Oracle eMail Center, page 1-5

- Oracle Partners Online, page 1-5

For information about searching with integrated products, see:

About Searching with Integrated Modules--Agent Flows, page 3-35

About Searching with Integrated Products--Customer Flows, page 5-11

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. Oracle iSupport enhances customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations. For more information, see the *Oracle iSupport User Guide*.

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

Oracle TeleService

Oracle TeleService (Support module) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. It is an agent-facing module that a customer service representative or agent (CSR) uses. Oracle TeleService provides an integrated solution for conducting all aspects of customer management and interaction. It provides call center agents with the tools and information required for effective customer relationship management. For more information, see the *Oracle TeleService User Guide*.

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

- A CSR receives a customer call. The agent opens a service request by entering customer information and verifying service eligibility.

- The CSR notes the customer problem. While writing the problem description, the CSR searches the knowledge base for similar information. If the same or similar problem exists, a solution may be available as well. Agents can access more solutions than customers.

- The CSR searches in the knowledge base for an existing solution. If a suitable solution is found, the CSR can use it. If not, the CSR can create a new solution.

Oracle Depot Repair

Oracle Depot Repair tracks and manages the repair process in a service organization. This module reduces customer downtime and helps bridge the gap while the product is being repaired. For more information, see the *Oracle Depot Repair User Guide*.

Oracle eMail Center

Oracle eMail Center manages inbound e-mail interactions with customers, partners, suppliers, employees, and others who interact with an organization. Oracle eMail Center provides agents with tools and capabilities to maximize their productivity and effectiveness. For more information, see the *Oracle eMail Center User Guide*.

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

Oracle Partners Online

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

- Partner profiling and opportunity matching for the vendor.

- Online access to latest product collateral and sales and service support for the partners.

Users of Oracle Partners Online can access Oracle Knowledge Management by way of the Support tab in Oracle iSupport. For more information, see the *Oracle Partners Online User Guide* and the *Oracle iSupport User Guide*.

2

Overview

This chapter covers the following topics:

- About Accessing Oracle Knowledge Management
- Summary of Tasks

About Accessing Oracle Knowledge Management

Oracle Knowledge Management has both internal users and external users that can search for published solutions. Users of several Oracle Applications modules access Oracle Knowledge Management for searching and creating solutions. For example, Oracle iSupport users can access Oracle Knowledge Management from the Support tab on the Oracle iSupport Home page to search for published solutions.

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

Solution Security impacts all users of Oracle Knowledge Management. By associating Visibility Levels to categories, solutions, statements, category views, and user accounts, Solution Security lets you manage who can see which information. By specifying Visibility Levels, you can use Solution Security to manage the relative confidentiality or sensitivity of information.

Roles, Responsibilities, Permission, and Access

Responsibilities determine:

Roles determine window-level permission. A user can have one or more Roles.

- The menus that a user views.

- The Category Security Group (category view) to which a user belongs. This establishes which categories users can access.

Every user must have at least one Responsibility, but a user can have one or more Responsibilities.

Users may be either:

- **External**: Those who have only view and search access to published solutions. Typically, external users may access Oracle Knowledge Management from other modules, such as iSupport.

- **Internal**: Include customer service representatives or agents, knowledge workers, and Oracle Knowledge Management administrators.

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

Responsibilities, Menus, and Tabs for Internal Oracle Knowledge Management Users

Responsibilities	Menus	Tabs
Knowledge Worker	CS_KB_TOP_KW_MENU	Knowledge, Authoring
Knowledge Agent	CS_KB_TOP_AG_MENU	Knowledge, Authoring
Knowledge Administrator	CS_KB_TOP_MENU	Knowledge, Authoring, Setup

Access for External Users

External users access Oracle Knowledge Management through other Oracle Applications modules. For example, users of Oracle iSupport click the Support tab on Oracle iSupport Home page. Both Oracle Depot Repair users and Oracle TeleService users can access Oracle Knowledge Management through the respective module's diagnostics feature. For more information, see the corresponding Oracle product documentation.

Access for Internal Users

The following procedure describes access for internal users of Oracle Knowledge Management.

Login

Oracle Applications

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab (default)

The Knowledge tab displays the Simple Search and the Knowledge: Browse by Subject areas. From the Knowledge tab you can search for or browse solutions.

For more information, see Managing Search., page 3-1

Summary of Tasks

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

- Manage Searches

- Manage Solutions

- Manage Solution Types

- Manage Statement Types

- Manage Categories

- Manage Authoring Flows

- Manage Security

Part 2

Agent Flows and Administration

This part contains the following chapters:

- Managing Search, page 3-1

- Managing Solutions , page 4-1

3

Managing Search

This chapter covers the following topics:

- About Managing Search

- Using Simple Search--Agent

- About Solution Details

- Using Advanced Solution Search--Agent

- Working with Statements

- Set Up Definitions for Frequently Used Solutions

- About Index Synchronization

- About Searching with Integrated Modules--Agent Flows

About Managing Search

This chapter includes information about the search functionality in Oracle Knowledge Management. The intended audiences for this chapter are agents and administrators. However, the user who accesses Oracle Knowledge Management from **other modules**, such as iSupport, can find the Overview section to be useful for background information on searching and browsing.

Those who access Oracle Knowledge Management from **other modules**, should see Managing Search--Customer Flow, page 5-1 for procedural information.

You search in Oracle Knowledge Management to find solutions in the knowledge base. In Oracle Knowledge Management, you can:

- Extend searches to include multiple repositories.

- Allow users to search using different searching methods.

- Control user access to solutions according to Security settings.

Search Modes

Oracle Knowledge Management has the following search modes:

- **Simple Search**: Perform text searches across multiple repositories. Examples of repositories include Solutions, Forums, and Categories. Simple Search uses the Oracle Text search engine to execute key word searches.

  > **Note:** Earlier versions of Oracle Knowledge Management referred to Simple Searches as either Basic Searches or Unified Searches.

- **Advanced Solution Search:** Perform solution searches by using statements to search and manipulate criteria. Advanced Solution Searches search exclusively in the Solutions repository.

Indexing and Availability of Solutions

Both the Simple Search and Advanced Solution Search retrieves only published solutions that have been indexed. That is, neither the Simple Search nor the Advanced Solution Search can retrieve solutions that are in progress, in draft mode, or obsoleted.

Security and Visibility

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access.

Integrated Modules

Other Oracle service-related modules access and search using Oracle Knowledge Management. For example, service representatives might try resolving customer issues by searching Oracle Knowledge Management from the Oracle TeleService module, while customers might search for solutions through Oracle iSupport. Depot Repair users can search using Oracle Knowledge Management to diagnose repair jobs.

Knowledge and Solutions

Solutions are not only content. Solutions are pieces of knowledge or knowledge articles that actually provide information on how to resolve a particular issue.

The main components of a solution include: statements, related categories, related items, related platforms, attachments, Task Group Templates, external objects, authoring comments, and feedback.

> **Note:** Earlier versions of Oracle Knowledge Management referred to Items as Products.

For more information about solutions, see Managing Solutions, page 4-1.

Other overview topics that pertain to agent-flow searching include:

- Solution Overview, page 3-3

- Searching Functionality Overview, page 3-3

- About Sorting Search Results, page 3-6

Solution Overview

To understand the searching process in Oracle Knowledge Management, it is important to understand how you add solutions the knowledge base.

The following example describes how to add a solution to the knowledge base.

Example: Solutions in the Knowledge Base

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

Searching Functionality Overview

Oracle Knowledge Management integrates with Oracle Text to provide complete and flexible search functionality. You can use Oracle Knowledge Management to browse or search for solutions and statements using the following ways:

- Simple Search, page 3-3

- Categories, page 3-4

- Advanced Solution Search, page 3-5

- Statement Search, page 3-6

- Solutions in Progress, page 3-6

Simple Search

In its simplest form, a search can be a key word search. The Simple Search lets you enter

key words to perform a search for solutions across multiple repositories within the knowledge base. By default, Solutions, Forums, Categories, and Service Requests are the repositories available for search.

The Simple Search performs a key word search of the solution header, body, and number. For categories, the Simple Search performs a key word search on the category name. For forums, the Simple Search performs a key word search across the message subject, message body, and message number. For service requests, Simple Search performs a keyword search on the summary and Notes.

The following example describes a scenario for a Simple Search.

Example: Simple Search

A customer of Bicycle Company ABC has logged on to Oracle iSupport to find out how to remove a tire from a bike. The customer enters the key words, *remove tire*, into the text entry box to search the knowledge base. After selecting search, a list of results appear in a summary table. The sorting within the summary table shows the documents of highest relevancy (score) to the search criteria at the top. Each row in the table displays a solution. The customer identifies a potential solution from the search results table called, *Removing a Tire*. The customer can view the solution details by clicking the solution title. The customer can also view the search results across multiple repositories, such as by solution, forum discussion, or an existing service request.

Categories

Categories are a way to organize the knowledge base. Categories let you navigate or browse through a hierarchy of categories, subcategories, and solutions within the knowledge base.

The following example provides an example of how to use categories to browse.

Example: Browsing Categories

Bank ABC has set up Oracle Knowledge Management categories to allow tele-service representatives to navigate solutions, thereby replacing the need for its large employee procedure manual, which answers basic customer questions about the bank and its products. Categories for Bank ABC include Customer Address Procedures, Branch Locations, Business Hours, Checking Accounts, and Savings Accounts.

A customer calls the Bank ABC tele-service center and asks how late the San Jose branch is open. The Bank ABC tele-service representative navigates to the **Branch Locations and Hours** category. A list of subcategories appears. The tele-service representative then navigates into a subcategory called **Northern California Branches**. Within the **Northern California Branches** subcategory a list of results appear in a summary table. Each row in the table shows a solution. The tele-service representative identifies a potential solution from the search results table called **San Jose Branch Details**. The representative can view the solution details by clicking the solution title. Using the information contained in the solution details, the representative can answer the customer's question.

Advanced Solution Search

Advanced Solution Search lets you search for solutions that meet specific user defined criteria. This is a more comprehensive search that enables you to set conditions, filters, and incorporate similar and identical statements into your search. Solutions are made of statements. 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.

The following figure shows how Oracle Knowledge Management's Advanced Solution Search identifies related statements and solutions in the knowledge base.

Related Statements and Solutions
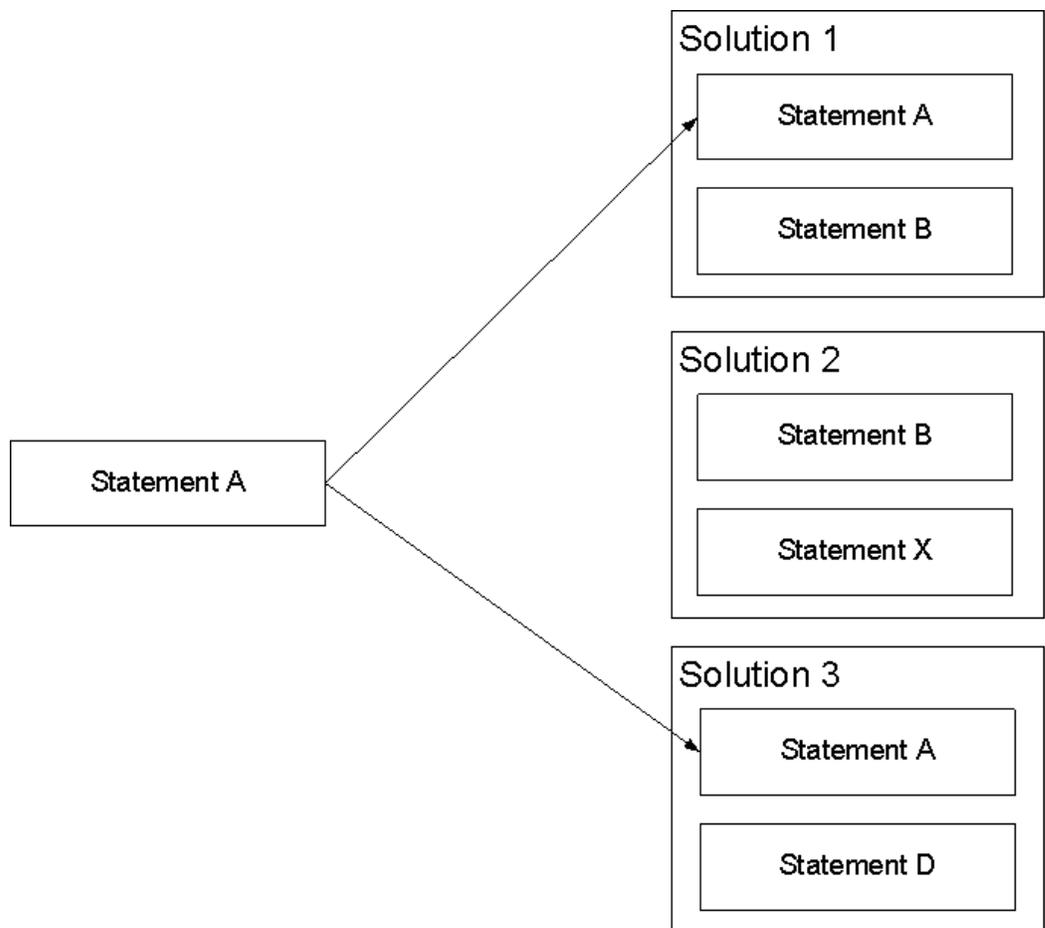
Summary of Related Statements and Solutions Figure: Statements B and D are related to Statement A because they are part of solutions that also contain Statement A. If you select statement A and search for related statements, both statements B and D appear in the results. Statement X is not related to Statement A because it is not part of a solution that contains Statement A. Solutions 1 and 3 are related to Statement A because they

each contain Statement A. If you select statement A and search for related solutions, solutions 1 and 3 appear in the results. Solution 2 is not related to Statement A because it does not contain Statement A.

The following example provides an example of how to search with Advanced Solution Search.

Example: Advanced Solution Search

Electronics Manufacturer ABC has discovered one of the components it manufactures, the ABC Hard Drive, is defective. Currently several solutions in the knowledge base relate to the ABC Hard Drive. To ensure that the knowledge base contains accurate and up-to-date information, knowledge workers can search for statements of type **symptom** that describes the problem. From the matching statements, the knowledge worker can view solutions that relate to the issue better.

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

Statement Search

You use statement search more for statement maintenance rather than a way of finding solutions. Statement Search lets you search for specific statements and find their related solutions.

Solutions in Progress

Solutions in Progress (formerly known as Work Pending in prior versions of Oracle Knowledge Management) is a search that is specifically designed to search drafts or solutions that are not yet published. This search provides an way for knowledge workers or approvers to process solutions.

About Sorting Search Results

Search results within Oracle Knowledge Management appear in a summary table that you can sort by column. To sort data into ascending or descending order, click a column heading. When you sort by column, an arrow appears in the column heading. An Up arrow indicates an ascending sort and a Down arrow indicates a descending sort.

Access to Solutions and Statements

When you create a solution or statement, you assign a Visibility Level attribute. This attribute along with user access levels makes it possible to control which solutions and statements a particular user can access during a search. This allows companies to add information to the knowledge base that can be critical in helping employees do their jobs, but it might not be appropriate for customers to see.

Visibility Levels include:

• **Restricted** (highest security): A solution that only users with restricted permission

can view. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **Internal**: A solution that users with internal or restricted permission can view. This Visibility Level identifies solutions that internal users within a company can view.

- **Limited**: This Visibility Level has the same effect as internal distribution. The Limited Visibility Level is a way for companies to identify solutions that can be distributed manually to external customers through a mechanism, such as e-mail. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **External** (lowest security): A solution that users with external, internal, or restricted permission can view. This Visibility Level identifies solutions that internal users within a company and external customers can view.

Although there are four Visibility Levels in effect, there are only three. Both the Internal and Limited Visibility Levels are the same. This is a way for companies to distinguish the solutions that are intended for different internal audiences.

For more information about Security and Visibility, see *Oracle Knowledge Management Implementation and Administration Guide*.

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

The following example describes how a company might use Visibility Levels.

Example: Visibility Levels

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

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

- A knowledge worker at Company ABC creates a statement with an internal distribution that states, **Forward customer name and solution number to sales@companyabc.com**.

- A knowledge worker at Company ABC creates a statement with an external distribution that states, **Training is available by calling Company ABC University at 800.555.4321**.

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

Using Simple Search--Agent

This section applies to the agent-facing flows that are available directly within Oracle Knowledge Management. Agents may comprise knowledge workers, technical support agents, or other employees. If you are accessing Oracle Knowledge Management from other modules, such as Oracle iSupport, refer to Managing Search--Customer Flow, page 5-1 for procedural information.

Simple Search lets you enter key words to perform a search for solutions across multiple repositories within the knowledge base. By default, Solutions, Solution Categories, Service Requests, and Forum are the repositories available for search. Because of its key word based interface, simple search is accessible to users of all levels of experience. The Simple Search matches the words that you enter across the header and body of the solution.

> **Note:** Previous versions of Oracle Knowledge Management referred to the Simple Search as either the **Basic Search** or the **Unified Search**. Also, previous versions of Oracle Knowledge Management referred to items as **products**.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security in *Oracle Knowledge Management Implementation and Administration Guide*.

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

Simple Solution Search Process Diagram
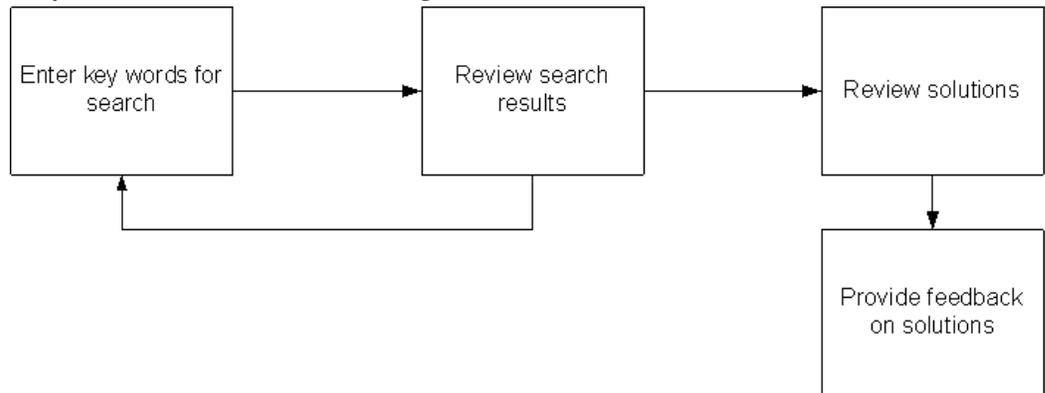
Use this procedure to perform a Simple Search.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent Knowledge

Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Knowledge...Simple Search area

Steps

1. In the Search field, enter any key word criteria.

2. In the Using field, choose one:

    • **Any of the words**: To match one or more words in any sequence.

    • **All of the words**: To match all words in any sequence.

    • **Exact Phrase**: To precisely match word-by-word in the same sequence.

3. Optional: In the Item field, specify the product name or description by choosing from the Search and Select List of Values.

    Note: The administrator can configure the item fields to be any one of: a list of values with product descriptions, a list of values with product names, a list with

product descriptions, or a list with product names.

To access the Search and Select List of Values:

1. Click the Flashlight icon. The Search and Select List of Values window opens.

2. In the Search field, choose to search either by Product Name or Description.

3. In the empty field to the right, enter search criteria, and click Go. The search results appear on a list.

4. Select an item on the list and click the Select button, or click the Quick Select icon. The description of the selected item appears as search criteria in the Simple Search area. The underlying product itself, not the product description text, is what is added to the search criteria. The description text that appears in the box is there to remind you of the product that you chose. The description text is not actually used in the search.

    Note: Your administrator can personalize the search region so that the product name appears instead of the product description.

4. Click Go.

    The Simple Search Result page displays the results on any of these tabs: Solutions, Categories, Service Requests, and Forum. Each tab represents a repository. The number of search matches appear on each tab name.

    For more information, see About Simple Search Results, page 3-10.

Related Topics

About Simple Search Results, page 3-10

About Categories, page 3-13

Browse Categories, page 3-13

About Forum Messages, page 3-15

About Simple Search Results

The Simple Search results appear in tabs. Each tab corresponds to a repository. The repositories are:

•   Solutions, page 3-11

•   Solution Categories, page 3-11

•   Service Requests, page 3-12

•   Forum, page 3-12

Common actions that you can perform from the repository tabs include:

- Sorting the display of search results by clicking the Score, Name, Solution Number, or Updated Date column headings.

- Modifying your Simple Search criteria. For more information, see Using Simple Search, page 3-8.

- Moving your Simple Search criteria to Advanced Solution Search by clicking the Advanced Solution Search link. For more information, see Move Simple Search Criteria to Advanced Solution Search, page 3-21.

Solutions

Search results on the Solutions tab include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

  For more information, see Solution Scoring, page 1-4.

- **Title**: Indicates the solution title. You can click the title to drill down to the solution details.

- **Solution Number**: Displays the matching solution number, which is a unique reference for the solution.

- **Updated Date**: Shows the most recent date on which an update occurred.

On the Solutions tab, you can:

- Click a solution title to display the solution detail page. For more information, see About the Solution Detail Page, page 3-15.

- Click the Create Solution button to create a new solution. For more information, see Create a Solution, page 4-5.

Solution Categories

Search results on the Solution Categories tab include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Name**: Shows the category name and hierarchy.

On the Solution Categories tab, you can:

- Click the category name to display solutions listed. For more information, see About Categories, page 3-13.

Service Requests

Search results on the Service Requests tab include:

- **Score %**

- **Summary**

- **Number**

- **Status**

- **Problem Type**

- **Resolution Type**

For more information about Service Requests and its fields, see the *Oracle iSupport User Guide* and the *Oracle TeleService User Guide*.

Forum

Search results for the Forum repository appear in a summary table and include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

  For more information, see Solution Scoring, page 1-4.

- **Title**: Indicates the forum title. Click a title to see its contents.

- **Updated Date:** Shows the most recent date on which the forum was updated

On the Forum tab, you can:

- Click the corresponding Forum to display the Message Content page. For more information, see About Forum Messages, page 3-15.

- Sort the display of search results by clicking the Score, Title, or Updated Date column headings.

- Modify your Simple Search criteria. For more information, see Using Simple Search--Agent, page 3-8.

- Move your search criteria to Advanced Solution Search by clicking the Advanced Solution Search link. For more information, see Move Simple Search Criteria to Advanced Solution Search, page 3-21.

Related Topics

About Categories, page 3-13
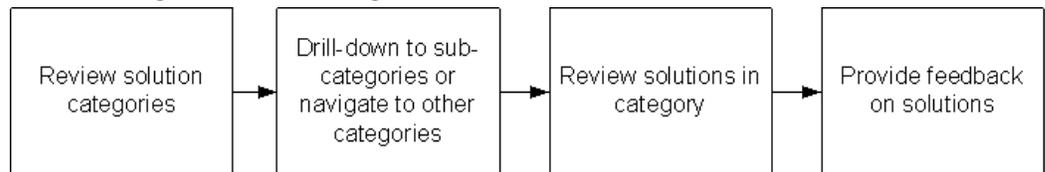
Browse Categories, page 3-13

About Categories

You use Categories to organize solutions into logical groupings or subject areas. Using the analogy of a library, you could:

- Characterize fiction as a category

- Characterize mysteries and classics as subcategories

- Compare books to solutions

- Compare book titles to solution titles.

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

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

Browse Categories Process Diagram

About Category Browsing from Search Results

You can browse categories directly from the search results. By clicking a category's name in the search results, you navigate to the same category browse view as the one reached by drilling down from category to category.

For more information on performing a Simple Search, see Using Simple Search--Agent, page 3-8.

Related Topics

Browse Categories

Use this procedure to browse categories to find solution.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Search

Steps

1. In the Browse by Subject area, click a Category.

    The Browse By Subject page appears.

2. Click a Category (a subcategory) or a Solution.

    The Solutions section follows the Browse By Subject section.

3. To filter solutions by some time frame or period, choose a value from the **View solutions updated** list and click Go.

    Examples of time frames or periods can include: this week, this month, the past 3 months, the past 6 months, this year, the past two years, and all.

You can also perform a Simple Search to narrow your category browsing solution results. You can specify key word and product criteria using the search method that you want to use.

For more information, see Using Simple Search--Agent, page 3-8.

Solution Results within a Category

The Solution results that appear within a Category appear in a summary table and include:

*   **Title**: Indicates the solution summary. Users can click the title to drill down to the solution details.

*   **Number**: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.

*   **Updated Date**: Shows the most recent date on which the solution was updated.

*   **Read**: Lets you know whether or not you' have already read that forum message.

To display the solution detail page, click the corresponding title.

About Forum Messages

You can use the Simple Search to search across multiple repositories, including Forums. Forums are online discussion messages that can provide some assistance to problems, symptoms, and solutions. The Simple Search performs keyword searches across the message subject, message body, and message number. You view the list of matching forum messages from the Forums tab on the Simple Search page. Click the Title of a message to display the Forum Message page. The Forum Message page displays:

- **Header information**: Number, Status, Author, Visibility, and Created.

- **Message**: The message details.

- **Related Messages**: Other messages in the message thread, including the original and replies. For more information, see the following topic, About Related Messages, page 3-15.

About Related Messages

The Related Messages area of the Forum Messages page displays a hierarchy that you can expand or collapse by clicking a Plus or Minus icon. At the top of the hierarchy is the original message. Subordinate to the original message are replies and replies to replies.

The Related Message section displays the **Message** title, **Author**, **Created** date, and **View** icon.

Optionally, you can click either link:

- **Expand all**: Display the list of the original forum message and all of the replies.

- **Collapse all**: Hide all the replies to the original forum message.

To see the specific related message or reply, click the View icon.

Related Topics

Using Simple Search, page 3-8

About Simple Search Results, page 3-10

About Categories, page 3-13

Browse Categories, page 3-13

About Solution Details

This section applies to the agent-facing flows that are available directly within Oracle Knowledge Management. Agents may comprise knowledge workers, technical support

agents, or other employees. If you are accessing Oracle Knowledge Management from other modules, such as Oracle iSupport, refer to Managing Search--Customer Flow, page 5-1 for procedural information.

Whenever you view a knowledge solution from within Oracle Knowledge Management or from another module, such as TeleService or Depot Repair, the presentation and format of the information appears on the solution detail page.

The Solution Detail page:

- Identifies important information about the solution including what the solution is about (statements), and the type of solution.

- Shows how the solution is applicable to specific products, categories, and platforms. If no data exist for an area, then corresponding product, category, or platform area does not appear.

- Shows details, such as the attachments, Task Group Templates, and external objects (that is, Service Requests, Repair Orders, and so forth). If no data exist for an area, then corresponding attachments, Task Group Templates, or external objects area does not appear.

The system may have activated Task Group Templates with a solution. Solution detail can include these tasks, which are a description of how to take action on a solution. An example of a task is **schedule a field service representative**.

Elements that comprise a solution include:

- **Header**

- **Related Categories**

- **Related Items**

- **Related Platforms**

- **Statements**

> **Note:** The statement is the most critical information in the solution.

- **Attachments**

- **Task Group Templates**

- **Authoring Comments**

- **Feedback**

For more information about these elements, see Create a Solution, page 4-5.

About the Solution Detail Page Header

Information identifying the solution and its history appear in the header. The header includes:

- **Type**: Indicates the solution type.

- **Status**: Indicates where the solution is in the approval cycle.

- **Author**: Indicates user who created solution.

- **Visibility**: Indicates who can access the solution.

- **Last Updated**: Indicates when the solution was last updated.

- **Updated By**: Indicates who updated the solution most recently.

- **Flow name**: Only for solution in progress version, shows the authoring flow name.

- **Locked by**: Only for solution in progress version, shows the name of the person who locked the solution.

Related Topics

About Accessing Solution Details

You can access the solution detail page from a number of ways, such as by searching or browsing. For more information, see:

-

-

-

-

Features on the Solution Details Page

You can submit comments that can be reviewed and added to the solution. In addition, you can indicate whether a solution can solve your problem. Oracle Knowledge Management captures responses in Usage counts.

The options that are available on the solution detail page vary according to the context

in which you accessed the solution's details. For example, if you are viewing a solution that is undergoing revisions, then the View Current Published Version is available.

From the solution detail page, you can:

- **View In Progress Version** or **View Current Published Version**: Read and compare any version of this solution that is undergoing editing with the most recently published version. The View In Progress Version button and the View Current Published Version button appear only if the corresponding version exist.

- View a **Printable Page**: Produces a page that is more suitable for printing.

- **Lock and Update**: If you have access to all statements in a solution, this option lets you lock and update and update the solution. Locking prevents others from updating the solution. (Previously, this button was the **Check Out** button.

- **Related Solutions**: The Related Solutions page displays all solutions that contain the specified statement. For more information, see View Related Solutions, page 3-19.

- View a list of **Related Items**: Automatically displays other related or similar product names. If there are no related items, then this list does not appear.

- View a list of **Related Platforms**: Displays a list of related or similar platforms. If there are no related platforms, then this list does not appear.

- **Update**: This is available to person who has created or locked the solution. Knowledge workers are the ones who would usually perform updates.

- **Get Lock**: This is mainly for the administrator to get the lock of the solution if the solution has been locked by someone, but that person is not available to update and save their updates. Examples of a person who might not be available include an employee who is away on holiday or a business trip, or who no longer works for the company.

About Solution Usage Counts

The solution usage count describes how many times that users have indicated that a solution is **useful**. In Oracle Knowledge Management, every time users indicate that they used a solution to solve a problem, Oracle Knowledge Management updates the solution usage count. In the modules that integrate with Oracle Knowledge Management--such as Oracle iSupport--the question, **Can this solution solve your problem?**, appears in the user interface flow. If a user clicks **Yes**, then the Knowledge Management Update Solution Used Count concurrent program updates the used counts in Oracle Knowledge Management based on a time schedule that an administrator had set up. For example, if the schedule is every eight hours, then the system updates the usage count every eight hours.

Related Topics

View Related Solutions

The Related Solutions page displays all solutions that contain the specified statement. For example, when you are viewing a statement on the solution detail page, you can click the Related Solutions button to find all solutions that make use of that statement. The list of related solutions displays:

- **Title**: The solution title.

- **Title**: The solution title.

- **Number**: The solution number.

- **Type**: The solution type, such as FAQ, Problem Fix, SCA.

- **Status**: The solution status, such as Publish.

- **View icon**: Click the icon to view the related solution. For more information, see Features on the Solution Details Page, page 3-17.

> **Note:** To return to the solution, click the **Return to Solution** link.

Related Topics

About Accessing Solution Details, page 3-17

Features on the Solution Details Page, page 3-17

View Related Solutions, page 3-19

Using Advanced Solution Search--Agent

This section applies to the agent-facing flows that are available directly within Oracle Knowledge Management. Agents can comprise knowledge workers, technical support agents, or other employees. If you are accessing Oracle Knowledge Management from other modules, such as Oracle iSupport, see to Managing Search--Customer Flow, page 5-1 for procedural information.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access.

Topics in this section include:

- About Advanced Solution Search, page 3-20

About Advanced Solution Search

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

The following summary provides an overview of the search criteria that you can specify in an Advanced Solution Search.

Problem Statements

Statements are the basis of the Advanced Solution Search. Statements include:

- **Matching Statements**: This is a text-based search that searches the summary and details of existing statements in the database to try and find similar statements.

- **Related Statements**: A related statement search tries to find other statements that have been used in a solution containing a selected statement. You can execute a Related Statement search only if you have selected at least one matching statement. For an example of how statements relate, see Advanced Solution Search, page 3-5.

Types of Searches

Search options include:

- **Search Solutions**: This is a text based search. Search Solutions searches both solutions containing keywords in the statement section, and the solutions related to any statements selected in the statement section. In other words, Search Solutions finds all solutions that match the search criteria.

- **Search Related Solutions**: Search Related Solutions finds all solutions that contain the specified solutions.

  > **Note:** By default, the Search Related Solutions option is not available. You can make this option available through personalization.

  This search is based on the links that the selected statements have to solutions. Any

solution that has a relationship with any of the selected statements appears in the search results. Relationships are created between a statement and a solution when a statement is used in the solution. The score reflects a variety of criteria that Oracle Knowledge Management uses.

For more information, see Solution Scoring, page 1-4.

Move Simple Search Criteria to Advanced Solution Search

Another means by which you can specify some advanced solution search criteria is to move Simple Search criteria over the Advanced Solution Search page. You can move Simple Search Criteria to the Advanced Solution Search page by clicking the Advanced Solution Search link that appears on the following Simple Search results tabs:

*   Solutions, page 3-11

*   Solution Categories, page 3-11

*   Service Requests, page 3-12

*   Forum, page 3-12

Related Topics

Search for Solutions Using Advanced Solution Search, page 3-21

About the Matching Statements Page, page 3-25

About the Related Statements Page, page 3-26

About Advanced Solution Search Results, page 3-26

Search for Solutions Using Advanced Solution Search

The following procedures describe how to specify criteria for an Advanced Solution Search.

For more information on using Advanced Solution Search, see About Advanced Solution Search, page 3-20.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Knowledge

Steps

1. Click Advanced Solution Search.

   The Advanced Solution Search page appears.

   Find Statements to Use as Criteria

2. In the Problem Statements area, choose from the following lists:

   • **Using**: **All of the words**, **Any of the words**, or **Exact Phrase**.

   • **Solution Type**: such as, **Symptom-Cause-Action**, **Problem-Fix**, or any solution types that your company has defined.

     Note: By default, both the **Using** and **Solution Type** lists are not available unless the administrator has configured them to be available.

3. In the Summary field, enter search criteria text for statements.

4. Click the Match Statement icon.

5. The Matching Statements page opens.

6. In the Select column, select one option button next to the matching statement that you want to use for advanced solution search criteria.

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

7. Click either the:

   • **Add** button to add the statement to the search criteria.

   • **Replace** button to replace any existing statement criteria with the selected statement.

     On the Advanced Solution Search page, the Matching Statements area displays the matching statements that you selected.

     For more information, see About the Matching Statements Page, page 3-25.

8. Optional: To add another row for specifying matching statement criteria, click the Add Another Row button and repeat the preceding steps on the new row.

   Add Related Statements

   After you add statement criteria to the Advanced Solution Search criteria, the Add Related Statements button becomes available. For more information, see About the

Related Statements Page, page 3-26.

9. To add related statements, click the Add Related Statements button.

   The Related Statements page appears.

10. To add a related statement to your Advanced Solution Search criteria:

    1. On the row of the statement, select the Select check box.

       You can select or deselect one or more statements.

    2. Click the Add button.

       The selected related statements appear on the Advanced Solution Search page as search criteria.

       Specify Qualifying Conditions

       Optional: By specifying qualifying condition criteria, you can refine and narrow your search by categories, items (products), or platforms. Qualifying conditions are also known as filters.

       Note: The Platform filter might or might not be available. Your administrator can hide or display the Platform filter through personalization.

11. To specify **categories** as qualifying conditions:

    1. Click the Add Categories button.

       The Add Categories page displays categories and subcategories in a navigation tree.

    2. To expand or collapse the category list, click the Plus or Minus button.

    3. In the Select column, select one or more items that you want to include and click the Select button.

       The selected categories appear in the Qualifying Conditions: Categories area of the Advanced Solution Search page.

12. To specify **items** (products) as qualifying conditions:

    1. Click the Add Items button.

       The Add Items page appears.

    2. In the Search area, specify Name or Description criteria and click Go.

       You can use the percent sign for specifying partial match criteria. Matching results appear on the list organized by Name and Description.

    3. In the Select column, select one or more the check boxes on the row(s) of items

that you want to include, and click the Select button.

The selected items appear in the Qualifying Conditions: Items area of the Advanced Solution Search page.

Note: Previous versions of Oracle Knowledge Management referred to **items** as **products**.

13. If available, to specify **platforms** as qualifying conditions:

    1. Click the Add Platforms button.

       The Add Platforms page appears.

    2. In the Search area, specify Name or Description criteria and click Go.

       You can use the percent sign for specifying partial match criteria. Matching results appear on the list organized by Name and Description.

    3. In the Select column, select one or more platforms that you want to include, and click the Select button.

       The selected solution platforms appear in the Qualifying Conditions: Platforms area of the Advanced Solution Search page.

       Search Solutions

14. To view search results of **solutions**, click the Search Related Solutions button.

    The Advanced Solution Search Results page appears.

    For more information about related solutions, see About Advanced Solution Search Results, page 3-26.

    Search Related Solutions

15. To view search results of **related solutions**, click the Search Related Solutions button.

    Note: By default, the Search Related Solutions option is not available. Your administrator can make this option available through personalization.

    The Advanced Solution Search Results page appears.

    For more information on related solutions, see About Advanced Solution Search Results, page 3-26.

Related Topics

About the Matching Statements Page, page 3-25

About the Related Statements Page, page 3-26

About Advanced Solution Search Results, page 3-26

About the Matching Statements Page

You can reach the Matching Statements page from different approaches or contexts:

- **From the Advanced Solution Search page**. The Matching Statements page shows published statements from that knowledge base that match search criteria that you specified, such as from the Advanced Solution Search page. You access the Matching Statement page by clicking the Match Statement icon on the Advanced Solution Search page.

  For more information, see Using Advanced Solution Search, page 3-19 and About Using Matching Statements with Advanced Searches, page 3-25.

- **From either the Create Solution page or the Update Solution page**. When you have completed or updated a statement and have clicked the Apply button. Oracle Knowledge Management automatically searches the knowledge base for possible matching statements to prevent duplicate statements from being added to the knowledge base. Results appear on the Match Statements page, which shows statements that might or might not be useful to the solution. You can optionally include any matching statements. When you access the Matching Statements page from the Create Solution or Update Solution page, you cannot change the search criteria.

  For more information, see Create a Solution, page 4-5.

About Using Matching Statements with Advanced Searches

When you are performing advanced solution searches, you can perform the following from the Matching Statements page:

- Add a matching statement to your Advanced Solution Search criteria by clicking the Select option button next to the statement and clicking the Add button. The select statement appears on the Advanced Solution Search page.

- Clear the original criteria and replace it with the selected criteria by clicking the Replace button.

- Edit the criteria on the Matching Statements page by adding or editing text in the Search field or choosing another Type.

- Return to the Advanced Solution Search page without applying any matching statement criteria by clicking the Cancel button.

Related Topics

About Advanced Solution Search, page 3-20

Search for Solutions Using Advanced Solution Search, page 3-21

About the Related Statements Page, page 3-26

About the Related Statements Page

The search for related statements finds all other statements that have been previously linked to the matched statement. The Related Statements page displays the results based on:

- **Score**: The strength or weight of the link.

- **Description**: A full statement that describes the related statement.

- **Type**: The statement type, such as symptom, cause, or action.

- **Visibility**: Who can see the statement.

- **Number**: Statement number.

- **Link Count**: The number of linked statements to the related statement. By default, this is a hidden column. The administrator can configure this page to display the Link Count.

- **Updated**: The most recent date that someone updated the related statement.

From the Related Statements page, you can add a selected related statement to Advanced Solution Search criteria.

For more information, see Using Advanced Solution Search--Agent, page 3-19.

Related Topics

About Advanced Solution Search Results

From the Advanced Solution Search results page, you can:

- **Create a solution**: Click the Create a Solution button to create a new solution that includes **all** the search criteria--both included and not included. The search criteria appear on the Create Solution page. You can remove any criteria as you create the solution.

  For more information, see Create a Solution, page 4-5.

- **Search criteria**: Click the Search Criteria page to return to the Advanced Solution

Search Result page.

- **View matching solutions**. The list of matching solutions area comprises:

  - **Select**: Option button lets you select one solution to display statements in the area below the list of solutions.

  - **Score %**: Shows how closely the results match the query.

  - **Title**: Indicates the solution title.

  - **Solution Number**: Indicates the solution identification number.

  - **Usage**: Shows how many times users have indicated the a solution is **useful**.

    > **Note:** By default, the Usage data does not appear. Your administrator can make it available through personalization.

  - **Updated Date**: Indicates the most recent date that someone updated the solution.

    > **Note:** You can sort the listing of solutions by clicking the column heading of the Score%, Title, Solution Number, or Updated Date column.

- **View corresponding statements.** Following the list of solutions is the statements area. The statements area shows you statements that correspond to the solution that you selected. From the statements area, you can select one or more statements and:

  - **Add selected statements as criteria to the search criteria**: Click the **Add to Search Criteria** button. The Advanced Solution Search page appears with the selected statements added as criteria. You can review or modify the criteria before performing a new search. For more information on specifying criteria, see Using Advanced Solution Search, page 3-19.

  - **Search with additional statement criteria**: Click the **Search with this additional criteria** button to perform a search using the selected statements as criteria plus any previously indicated criteria. Oracle Knowledge Management automatically adds additional criteria. The Advanced Solution Search Results page appears.

  - **View the full solution**: Click the Full Solution button to view all of the main components of the selected solution. For more information on solutions, see Managing Solutions, page 4-1.

- **View the statement**: Click the View icon to display the statement's details.

> **Note:** Click the **Return to Search** link to return to the Advanced Solution Search Results page.

Related Topics

Working with Statements

A solution consists of a series of statements. For example, the default solution type, Symptom-Cause-Action (SCA), includes the following statements: a symptom statement, a cause statement, and an action statement. By searching for a statement, you can find the related solutions that include that statement.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access.

Topics in this section include:

Related Topic

Search for Statements

Typically, knowledge workers and administrators search for statements to find related solutions. The 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 Statement page.

Use the following procedures to search for statements.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Statements...Search Statement page

Steps

1. In the Search Statement page, enter some known information to narrow your search:

   - **Search**: Enter free-form text criteria, including statement number.

   - **Type**: Indicates the statement type that is assigned to a statement when a statement was created.

2. Click Go.

   Results appear on the Search Statement Results page.

3. To sort the results, click the column heading for Score%, Number, or Type.

   Statement Search Results

   The Statement Search results appear in a summary table and include:

   - **Score**: Shows how closely the results match the query

   - **Number**: Indicates the statement number.

   - **Type**: Indicates the statement type.

   - **Summary**: Indicates a summary of the statement.

   - **View**: Click the View icon to see statement details and related solutions.

   Related Topics

   Edit Statements, page 3-29

   View Statement Detail Page, page 3-30

Edit Statements

You can edit or update statements to change the Visibility, Summary, or Details. In a

global update, if an update occurs to a statement that is shared across category groups, the update impacts only the current category group.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Search for the Statement. For more information, see Search for Statements, page 3-28.

Navigation

Knowledge > Knowledge tab > Statements...Search Statement page

Steps

1. On the row where the statement search results shows the statement that you want to edit, click the View icon.

   The Statement Detail page appears.

2. Click the Update button.

3. Make any changes to:

   - **Visibility**: Choose from the list.

   - **Summary**: Edit the text field.

   - **Detail**: Edit the contents, export or import contents, change the font or style if you are using the Rich Text Editor. For more information, see About the Rich Text Editor, page 4-11.

4. Click the Apply button to save your changes.

Related Topics

Search for Statements, page 3-28

View Statement Detail Page, page 3-30

View Statement Detail Page

Note for online Help: If you prefer information about viewing related solutions, click View Related Solutions, page 3-19.

The statement detail page provides information about a statement and lists the solutions utilizing the statement.

The main parts of the statement detail page are:

- **Header**: Information identifying the statement and its history appear in the header. In addition to a summary, the header includes:

  - **Number**: Indicates statement number.

  - **Type**: Indicates statement type.

  - **Visibility**: Indicates who can access the statement.

  - **Status**: Indicates whether the statement is Draft or Published.

  - **Created**: Indicates when the creation date of the statement.

- **Summary**: Displays the same summary that appears in the header.

- **Details**: Indicates the content type--for example, HTML--and any additional descriptions of the statement.

  > **Note:** It is highly recommended that if you want to render a URL link, you should use the HTML content type--such as HTML or HTML with AutoLink--rather than the Text content type.

- **Related Solutions**: Lists the solutions that the use statement. Click the View icon to view the solution detail page.

  For more information, see About the Solution Detail Page, page 3-15.

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

Copy as New

When you access the Statement Details page from Create Solution or Update Solution page, a Copy as New button is available. The Copy as New button lets you create a new statement by making a copy of an existing statement.

Related Topics

Search for Statements, page 3-28

Edit Statements, page 3-29

Set Up Definitions for Frequently Used Solutions

The main areas where you access Frequently Used Solutions include:

- **Browsing the solutions**: You can filter solutions by a different time frame. For more

information, see Browse Categories, page 3-13.

- **iSupport**: You can view a list of Frequently Used Solutions, which is a list of solutions that have been used within a specified time period. You--the administrator--define and maintain these time periods in Oracle Knowledge Management. In addition, you set the default time period or definition in Oracle Knowledge Management.

The number of definitions should be manageable and each definition should have a descriptive name that is easy to understand. The maximum number of days that you can define for a time interval is 5,000.

The following example shows how an administrator could set up the time intervals for frequently used solutions.

Example: Definitions for Frequently Used Solutions

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

The following procedures describe how to add a definition.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

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

Navigation

Knowledge > Setup > Frequently Used Definition...Frequently Used Definitions page

Steps

1. In the Default column, select the time period that you want to use as a default time period.

2. Click Update.

3. To add a new time period, click Add.

   The Add Definition page appears.

4. Type the new name, description, and number of days.

5. Click Save.

6. To remove a time period, select the Remove check box.

7. Click the Update button.

About Index Synchronization

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

Newly published solutions are not automatically indexed into the search process, which means that although a solution has been approved for publishing, it might not be searchable. Knowledge Administrators should run the Oracle Knowledge Management Index Synchronization program to add newly published solutions to the index. The **Knowledge: Index Content As Soon As Possible** profile option is available to re-index as soon as possible to make newly published solutions almost immediately available.

There is a trade-off to using the **Knowledge: Index Content As Soon As Possible** profile option. Indexing content as soon as possible increases the rate of fragmentation of the index, which over time slows the search performance. It is recommended to periodically run the synchronization index programs or request set in either **optimize** or **optimize full** mode to defragment the index. For more information, see the Oracle Text documentation on index optimization. It is recommended to run the synchronization index programs or request set in either **optimize** or **optimize full** mode even without this profile option being on. With the profile option on, however, you may need to optimize the indexes more frequently.

Synchronize Indexes

If an existing published solution is revised and republished, users cannot search for the solution until you run the index synchronization program.

You must run the request set **Knowledge Management: index synchronization set** with the "S" mode to synchronize the index. You must do this for the solution index, the statement index, and the category index. This is required to retrieve solutions in Knowledge Management.

The request set executes the following concurrent programs internally:

•   Knowledge Management Category Index Synchronization

•   Knowledge Management Forum Messages Index Synchronization

•   Knowledge Management Solution Index Synchronization

•   Knowledge Management Statement Index Synchronization

To synchronize all of these indexes, you can run the request set so that you do not have to run each of those programs separately. Of course, if you need to manage just one of the indexes, you could run only the specific index synchronization program.

For the new concurrent programs to appear in a user's request submission window, you must add the new concurrent programs to the request groups. See the following topic on how to add new concurrent programs to the request groups.

Add New Concurrent Programs to Request Group

A **request set** is a group of concurrent requests. The Knowledge Management Index Synchronization Set is a request set that contains the following concurrent programs:

- Knowledge Management Solution Index Synchronization Program

- Knowledge Management Statement Index Synchronization Program

- Knowledge Management Solution Category Index Synchronization Program

- Knowledge Management Forum Message Index Synchronization Program

- Knowledge Management Index Synchronization Set

When you add a concurrent program or request set lines on the Forms window to manage the request group, you choose from a list whether you are adding a **Set** or a **Program**. The Knowledge Management Solution Index Synchronization Set is a set, while the others are programs.

The following steps describe how to add a concurrent program to the System Administrator Reports request group.

Module

Oracle Applications

Login

System Administrator

Navigation

Security > Responsibility > Request

Steps

1. Go to the System Administrator responsibility.

2. Search for group System Administrator Reports.

3. After retrieving the System Administrator Reports group, add the **Knowledge Management Solution Index Synchronization Program** to it.

4. Save the record.

5. Repeat steps 3 and 4 for each new concurrent program.

6. Repeat steps 3 and 4 to add the new request set.

About Searching with Integrated Modules--Agent Flows

A number of modules within the Oracle E-Business Suite integrate with Oracle Knowledge Management, allowing users to search the knowledge base from other module. The modules that appear in this section relate to the agent-facing flows in Oracle Knowledge Management.

Topics in this section include:

- About Searching from Integrated Modules--Agent Flows, page 3-35

- About the Apply Task Group Template Page, page 3-36

Customer Flows

For information about integration with customer-facing flows, see About Searching with Integrated Products--Customer Flows, page 5-11.

About Searching from Integrated Modules--Agent Flows

Table 3–1 lists Oracle E-Business Suite modules that integrate with Oracle Knowledge Management searches by way of agent flows.

For information on Oracle E-Business Suite modules that integrate with Oracle Knowledge Management by way of customer flows, see Searching with Integrated Products--Customer Flows, page 5-11.

Table:Search Integrations from Agent Flows

E-Business Suite Module	Search Integrations
Oracle TeleService	TeleService users access Oracle Knowledge Management through the Service Request function in TeleService. For more information, see the *Oracle TeleService User Guide*.

E-Business Suite Module	Search Integrations
Oracle Depot Repair	Depot Repair users can access Oracle Knowledge Management through the Repair Orders function in Depot Repair.

For more information, see the *Oracle Depot Repair User Guide*. |
| Oracle eMail Center | eMail Center users access Oracle Knowledge Management data from eMail Center.

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

About the Apply Task Group Template Page

The Apply Task Group Template page applies **only** to the **Depot Repair-Knowledge Management integration flow**.

The Apply Task Group Template page shows you:

- The template that you are trying to apply. By applying a task template, you are creating the tasks that are in the template.

- The object that you are trying to apply the tasks towards (usage) and the object identifier (reference number) for which these tasks are being created.

On the Apply Task Group Template page, you specify an owner of the tasks that you are creating. The owner can be of different type.

For information about the Service Request-Knowledge Management integration flow, see the Service Request product documentation.

From an integration, the task templates that relate to the integration object appear on the View Solution page and a Take Action icon is available. For example, from Depot Repair, you can take action on the task template that relates to Depot Repair.

When you click the Take Action icon, the Apply Task Group Template page appears. You can:

- Specify the Owner Type.

- Search for and select an Owner.

4

Managing Solutions

This chapter covers the following topics:

- About Managing Solutions

- Create a Solution

- Submit a Solution for Reviews and Updates

- Working with Solutions in Progress

- Set Up Recommended Solutions

- Set Up Note Token Rules or AutoLinks

About Managing Solutions

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

The following example shows an example of a solution and what the solution contains.

Example: Solution Contents

An electronics manufacturer creates a solution with the title **My Monitor is not Working**. This solution contains statements that help resolve issues with a monitor:

1. Statement: Monitor screen is blank.

2. Statement: Monitor is not plugged into computer.

3. Statement: Plug monitor into computer and reboot.

In the preceding example, you can make distinctions about the statements by using **statement types**. Statement types help to describe or classify statements. For example, statement 1--Monitor is blank--is a **symptom statement**. Statement 2--Monitor is not plugged into computer--is a **cause statement**. Statement 3--Plug monitor into

computer--is an action statement.

Other Solution Information

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

- Solution Title, page 4-2

- Categories, page 4-2

- Solution Type, page 4-2

- Visibility Level, page 4-3

- Items, page 4-3

- Platforms, page 4-3

- Attachments, page 4-3

- Task Group Templates, page 4-4

- External Objects, page 4-4

Solution Title

Use a solution title to help users identify a solution in the knowledge base.

Categories

You use categories to organize solutions into logical groupings. Using the analogy of a library, you could:

- Characterize fiction as a category.

- Characterize mysteries and classics as subcategories.

- Compare book titles to solutions.

Solution Type

You categorize solutions into **solution types**. Solution types help organize solutions within the knowledge base. Depending on the solution type, solutions contain one or more mandatory statements and can include optional statements. For example, the default solution type, Symptom-Cause-Action (SCA), consists of the following mandatory statements: a symptom statement, a cause statement, and an action statement.

Visibility Level

Upon creation of a solution or statement, the author specifies a Visibility Level. Along with user access levels, the Visibility Level makes it possible to control which solutions and statements a particular user can access during a search. This allows companies to add information to the knowledge base that can be critical in helping employees do their jobs, but might not be appropriate for customers to see.

Visibility Levels include:

- **Restricted** (highest security): A solution that only users with restricted permission can view. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **Internal**: A solution that users with internal or restricted permission can view. This Visibility Level identifies solutions that internal users within a company can view.

- **Limited**: This Visibility Level has the same effect as internal distribution. The Limited Visibility Level is a way for companies to identify solutions that can be distributed manually to external customers through a mechanism, such as e-mail. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **External** (lowest security): A solution that users with external, internal, or restricted permission can view. This Visibility Level identifies solutions that internal users within a company and external customers can view.

Although there are four Visibility Levels in effect, there are only three since Internal and Limited are the same. The Internal and Limited assignments are a way for companies to designate the solutions that are intended for internal audiences.

Items

You use products to help identify which items (products) that a solution may impact. For example, in the preceding monitor example, it might be helpful to add all monitors that the company sells to the solution.

Platforms

You use platforms to help identify which platforms that a solution may impact.

Typically, computer industry companies might use platforms. You can display or hide the Platform attribute through personalization, a means of customizing the way Oracle Knowledge Management pages appear.

Attachments

You use attachments to supply additional documentation that can be helpful to the

solution. An example of an attachment is a document, such as a white paper on a related topic.

Task Group Templates

Knowledge administrators use Task Group Templates to attach a task to a solution. These tasks help automate the service process. While solutions help describe how to fix a problem, tasks provide actions to fix the problem. An example of a task is Schedule an engineer to repair problem.

External Objects

You use external objects to indicate additional solution-related objects in the database, such as a service request or a repair order. Other modules that call on the solutions in Oracle Knowledge Management require external linking. For reference, you may find it useful to see other solution-related objects in the database.

About Solution Life Cycles

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

The following figure shows the solution life cycle from formulation of an idea for a solution, through review and publishing, and ultimately to when the solution is no longer relevant and becomes obsolete.

Figure: Solution Lifecycle Process Diagram
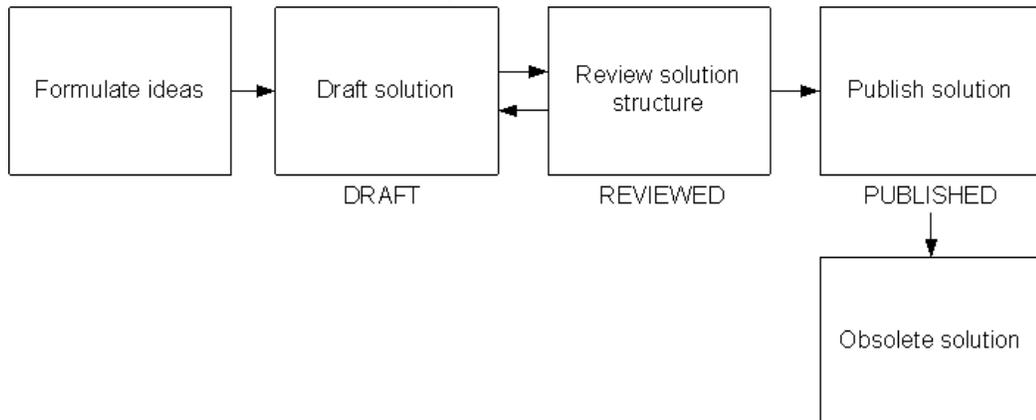
You use the status of a solution in the authoring flow process. You associate each status with a step in an authoring flow and only users that are members of a **user group** who are assigned to that authoring flow and that step can modify the solution. When you review a solution, you can select the next step in the flow, bypass several steps if you are a member of multiple steps resource group, or reject the solution to any of the previous steps.

A statement can either be in the Draft status or Published status. When a solution is in a Draft status, any newly created statements are also in the Draft status. When a you publish a solution, you also publish the draft statements. You can reuse published statements in other solutions.

Create a Solution

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

The following procedures guide you through the process of creating a new solution. Those who are updating a solution, should refer to this section for information about parts of a solution. For other information about updating a solution, see Update a Solution, page 4-19.

The areas of creating a solution include:

- Specify the Solution Header, page 4-6

- Create and Add a Statement, page 4-6

- Add a Related Category, page 4-8

- Add a Related Item, page 4-9

- Add a Related Platform, page 4-9

- Add an Attachment, page 4-9

- Add a Task Template Group, page 4-10

- Add an External Object, page 4-10

- Save the Solution, page 4-11

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Navigate to the **Authoring** tab and then Solutions in Progress page.

Steps

Specify the Solution Header

1. Click the **Create Solution** button.

   The Create Solution page appears.

2. Required: Enter a title for the solution.

3. Select the solution type from the drop-down list.

   > **Note:** To save and submit a solution to an authoring flow, you must create and save the mandatory statement types. If you do not include the mandatory statement types, you can only save a solution and cannot submit it to an authoring flow.

   > Whenever you change the solution type, the system runs a compatible statement check. A warning appears for any statements that are not compatible with the selected solution type.

4. Select one of these visibility levels from the drop-down list: Internal, Limited, Restricted, or External. You can view one or more of these values depending on your access level.

5. Select an authoring flow from the drop-down list.

   Authoring flows define the steps through which a solution passes in the solution authoring flow process.

   Create and Add a Statement

6. To create a statement, click the **Create Statement** button.

   The Create Statement page appears.

   > **Note:** It is possible to have multiple statements for a solution. For example, a solution might have multiple causes and thus, multiple cause statements are included in a solution.

7. In the Summary area, provide the following details:

   - **Type**: Select a statement type from the following values of the drop-down list: Action, Answer, Cause, Changes, Fact, Fix, Objective, Problem, Question, or Symptom.

   - **Visibility**: Select either External or Internal.

- **Summary**: Describe the statement according to the statement type. You can enter, paste, or import text into the Summary area, which can accept a maximum of 500 characters.

8. In the Details area, select one of the following content types from the drop-down list:

- HTML

- HTML with AutoLinks

- Text

- Text with AutoLinks

> **Note:** You can use the Rich Text Editor in the Summary and Details area to edit and format text. For more information, see About the Rich Text Editor, page 4-11.
>
> You can use the HTML or HTML with AutoLink content type if you want to render a URL. For more information about AutoLinks, see Set Up Note Token Rules or AutoLinks, page 4-27.

9. In the Details area, you can perform the following tasks:

- Enter detailed information related to a statement.

- Click the **Import Text from File** button to import text into the Details area. Select your source text file and click the **Apply** button. The text from the file appears in the Details area.

- To export text from the Details area, click the **Export Text to File** button. Specify location and file name for the exported file.

> **Note:** The Statement Details area has a size limit of 32 KB and the contents convert to a read-only text display above this limit. You can include up to 4 gigabytes of content in the Statement Details area. To update statement details with content above the size limit of 32KB, use Import Text from File.

- Click the **Import Text from Existing Statement** button to import summary and details from an existing statement. Enter search criteria in the Search field, select a statement type and click the **Go** button. Select the statement from the search results and click the **Select** button.

Oracle Knowledge Management automatically searches the knowledge base for possible matching statements to prevent duplicate statements from being added to the knowledge base. Results appear on the Match Statements page, which shows statements that might or might not be useful to the solution. To include any matching statements, select the statement and click the **Select** button.

When you access the Matching Statements page from the Create Solution or Update Solution page, you cannot change the search criteria.

To add existing statements to the solution:

1. Click the **Add Statements** button in the Create Solution page.

2. In the Add Statements window, enter search criteria in the Search field, select a statement type and click the **Go** button.

3. Select the statements to be included from the search results and click the **Select** button.

The statement summary and details are added in the Create Solution page.

To search for statements which were previously linked to the statement being entered in a solution:

1. Click the **Search Related Statements** button in the Create Solution page.

2. In the Search Related Statements window, select a statement that you want to include in the solution. The statement is added in the Create Solution page.

The selected statements appear in the Statements region of Create Solutions page.

- To view the summary and details for all statements in the Create Solution page, click Show All Details link.

- To hide statement summary and details in the Create Solution page, click Hide All Details link.

- To view or hide summary and details for a statement, click the right arrow in Details column.

- To move a statement in the Statements table, use the up arrow and down arrow In Move Up and Move Down columns.

- To remove a statement, click the Remove icon.

Add a Related Category

10. Required: To add a **related category**:

1. Click the **Add Categories** button in the Create Solution page. The related

categories are displayed in a table below.

2. Navigate and expand the category hierarchy to display categories and subcategories.

3. Select one or more categories that to be included in the solution.

> **Tip:** To select all categories and subcategories, click Select All link. To deselect previously selected categories and subcategories, click None link.

4. Click the **Select** button. The selected categories appear on the Create Solution page.

Add a Related Item

11. Optional: To add a **related item**:

1. Click the **Add Items** button in the Create Solution page.

2. In the Search area of Add Items window, enter search criteria for Name or Description and click the **Go** button. Search results appear in the area below.

3. To view additional items, if any, click Next link.

4. Select one or more related items to be included in the solution. To select all items, click Select All link.

5. Click the **Select** button. The selected items appear on the Create Solution page.

Add a Related Platform

12. Optional: To add a **related platform** (if available):

1. Click the **Add Platforms** button in the Create Solutions page.

2. In the Search area of Add Platforms window, enter search criteria for Name or Description and click the **Go** button. Results appear in the area below.

3. To view additional platforms, if any, click Next link.

4. Select one or more related platforms to be included in the solution. To select all platforms, click Select All link.

5. Click the **Select** button. The selected platforms appear on the Create Solution page.

Add an Attachment

13. Optional: To add an **attachment**:

    1. Click the **Add Attachments** button in the Create Solutions page.

    2. In the Attachment Summary Information area, enter title and description for the attachment.

    3. In the Define Attachment area, click the **Browse** button to specify the location and file name of the attachment.

    4. To add the attachment to the solution, click the **Apply** button.

    5. To add another attachment to the statement, click the **Add Another** button.

    Add a Task Template Group

14. Optional: To add a **task template group**:

    1. Click the **Add Task Template Groups** button.

    2. In the Add Task Template Groups window, specify search criteria in the Template Group ID or Template Group Name fields and click the **Go** button. Matching results appear in the area below.

    3. To view additional task template groups, if any, click the Next ink.

    4. Select one or more task template groups to be included in the solution. To select all task template groups, click the Select All link.

    5. Click the **Select** button. The selected task template groups appear on the Create Solution page.

    Add an External Object

15. Optional: To add an **external object**:

    1. In the External Objects area, select one of these modules or external references from the Add drop-down list values: Depot Service Codes, Depot Repair, or Service Requests. For more information about the respective object, see the corresponding product documentation.

    2. Click the **Go** button.

    3. In the Search area of the External Objects window, enter search criteria in the available fields and click the **Go** button. In addition to the Description field, other search fields vary according to the product or external reference selected. Matching results appear in the area below.

    4. To view additional external objects, if any, click the Next link.

5. Select one or more external objects to be included in the solution. To select all items, click the Select All link.

6. Click the **Select** button. The selected external objects appear on the Create Solution page.

Save the Solution

16. Click the **Save** button.

When you create a new solution, it is in Draft status. The Authoring Comments area appears in the solution. The reviewers and approvers can add comments in the Authoring Comments area.

> **Note:** To edit a solution, besides belonging to the user group, you must be able to access the solutions and be able to see all the statements in the solutions.

To remove any solution component from the Create Solution page, click the Remove icon for the component.

When you submit the solution, the system assigns a number to the solution statement and it is submitted to the authoring flow. After the solution is approved, its status is changed to Published.

About the Rich Text Editor

The Rich Text Editor lets you make styling and editing choices, including:

- Font.

- Font color.

- Font size.

- Viewing the HTML source.

- Cut, copy, and paste.

- Bold, italic, and underscore.

- Flush left, flush right, or centered text alignment.

- Numbered or bulleted lists.

- Increasing or decreasing the text indent.

- Creating hyperlinks.

> **Note:** The Rich Text Editor works only in a browser that supports IFRAMEs. If your browser does not support IFRAMEs, then a plain text area appears instead of the Rich Text Editor.

Submit a Solution for Reviews and Updates

Authoring flows are unique to each company. Some companies have authoring flows that require a series of technical and editorial reviews and approvals before you can publish a solution, for example. On the other hand, other companies, might not have any requirements to publish a solution. The following topics generally assume that you have set up solution authoring flows that require reviews, editing, and approval before publishing

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

Topics in this section include:

Preview Solution

When the solution is ready for submission, you can preview the solution before you submit it. This gives you a chance to review the overall solution and modify the solution, if necessary. Solutions are ready for submission if they have the required information such as the mandatory fields and the mandatory statements. For example, a Symptom Cause Action statement requires statements for each statement type, symptom, cause, and action.

To preview a solution for submission, click the **Preview** button from either the Create Solution page or the Update Solution page. The Submit: Preview Solution page appears.

For more information, on creating or updating solutions, see Create a Solution, page 4-5 or Update a Solution, page 4-19.

From the Submit: Preview Solution page, you can:

- View your draft solution in a formatted layout. This includes all statements, attachments, task template groups, external objects, authoring comments, related categories, related items, and related platforms.

    > **Note:** To view the list of external objects in a solution, you must choose the object type from the View drop-down list.

- To make more modifications to the solution, you can return to the Create Solution page or the Update Solution page by clicking the **Return to Solution** button.

- To submit a solution, click the **Submit** button. For more information, see Specify Authoring Flows, page 4-14.

About Authoring Flows

The authoring flow can be one step, such as publish, or it can be as complex as a business requires.

The following example describes an authoring flow.

Example: Authoring Flow

1. An author creates a solution on the Create Solution page. The author saves the solution. The saved solution becomes a work-in-progress solution and is in Draft status. The author can see the saved solution on the Solutions in Progress page.

2. An author can continue to work on the author's own solution-in-progress solution. After completing the solution, the author can click the **Preview** button from the Solution Detail page.

3. The Preview Solution page appears. The author can see how the solution would appear to others for review or upon publishing. If everything is okay, the author clicks the **Submit** button. The Submit: Select Authoring Flow page appears. The author chooses an appropriate workflow from the list.

4. The members of the resource group assigned to the authoring flow step that the author selected receive notification of the solution that needs a reviews. Members who want to receive a notification must subscribe to a category or a product in the Subscriptions page. The solution must be related to the subscribed product or category.

5. Any member of the resource group can navigate to the Solutions In Progress page and search for the solution that is ready for review. After the member has found the

solution, the member can click the **Lock and Update** button to lock the solution. No other member of the resource group can work on this solution until the member returns the solution to the authoring flow.

> **Note:** If the person who had locked the solution is no longer available to unlock it to work on the solution to submit it to an authoring flow, an administrator can get the lock for a solution that another user has locked. Another reason why a user cannot update a locked solution can be due to Security changes. A concurrent program is available to unlock these types of locked solutions.

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

7. A member can select the next or previous step for the solution. If the solution is rejected to an author, then the solution appears in the Author's Solution in Progress page, and the author can lock and update the solution, review comments, make required edits, and submit the solution back to the authoring flow. The author or reviewer can specify the next appropriate step or choose another authoring flow.

8. When the solution is submitted to a step whose action is Publish, then the solution's status changes to **Published**.

For information on managing authoring flows, see *Oracle Knowledge Management Implementation and Administration Guide*.

Specify Authoring Flows

When you create a solution and are ready to submit it, you have to assign an authoring flow to it. The Knowledge: Select Authoring Flow profile option controls whether a user can select an authoring flow to submit the solution during the solution authoring process. If the value of this profile option is set as No, then the user cannot select a flow and the system sends all submissions to the default flow that the Knowledge: Default Authoring Flow profile option specifies.

Authoring flows define the steps through which a solution passes in the solution authoring flow process. Some authoring flows require review and approval of a solution before it becomes available for search in the knowledge base. Other authoring flows might allow direct publishing of solutions without review or approval.

> **Note:** Authoring flows are unique to each company. Work flows in this document are examples only. Your workflow names, functionality, and choices may differ.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Assumption

You have not previously assigned an authoring flow to the solution.

Navigation

Navigate to the **Authoring** tab and then Solutions in Progress page.

Steps

1. Select a solution and navigate to the Solution Update page. For more information, see Update a Solution, page 4-19.

2. Select the authoring flow for your solution.

3. Click the **Submit** button.

    The solution is submitted for review and the Solution Details page appears. After the reviewer approves it, the solution is published.

Specify Authoring Step

When you create a solution, have assigned an authoring flow to the solution, and have submitted the solution for review and approval, you or a reviewer need to make revisions and specify the next authoring step. For example, a reviewer might add comments or make corrections to the solution. During the review and update process, the reviewers specify the next step through which the solution needs to go when they have finished their reviews or modifications.

The first time when you submit a solution, you see the list of flow names to select. However, when you submit the solution to the flow the first time, it automatically selects the first step of that flow to submit to. The **next** time when you submit the solution, you will have a list of steps to submit the solution to, including the step of **Rejected to Author**. These steps belong to the previously selected flow. The next step of the flow appears by default, however the user can choose to reject the solution to author.

> **Note:** Authoring flows are unique to each company. Workflow choices and statuses that are in this document are examples only. Your work flows may differ.

For example, possible next steps could include:

- Rejected to Author

- Technical Review

- Editorial Review

- Ready for Publishing

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

You have assigned an authoring flow to the solution. For more information, see Specify Authoring Flows, page 4-14.

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

You must be assigned the function to edit a solution in the draft status, to edit solutions in technical review status, and so forth.

Navigation

Knowledge > Authoring > Solutions in Progress...Solutions in Progress page

Steps

1. Locate the solution and display the Solution Update page. For more information, see Update a Solution, page 4-19.

2. Make your changes or updates to the solution.

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

3. Save the solution.

4. On the Preview for Submission page, click Continue.

   The Submit: Select Authoring Flow Step page appears. You have one the following choices:

   - Select the next authoring flow **step** and submit it. This choice lets you continue the review process with the current authoring flow. For example, if the revised solution requires an addition round of technical review, then you can choose the step for technical review. If the revised solution does not require any more

technical reviews, you might choose the step for editorial review. If you are re-submitting a solution, you may have the choice of rejecting the solution to the author.

- Click the Return to Solution button. You can resume reviewing or updating the solution.

- Click the Select Another Flow button, to choose another authoring flow.

5. If you choose continue with the current authoring flow:

    1. Select the option button on the row that shows the next flow step for your solution.

    2. Click the Submit button. A confirmation message indicates that the solution has been updated and submitted to a particular authoring flow.

Set Up Subscriptions

Before you submit a solution through the authoring flow process, you and those who are involved with reviewing and approving the solution should ensure that you all can receive e-mail notification of the solution that needs review or approval.

To review and approve a solution, e-mail notification is an option. Hence, all participants need to make sure that they can receive the e-mail notification if they would like to be informed about solutions ready to be reviewed and approved by way of notification.

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

Members of a user group can set up their own subscriptions, that is, choose one or more items (products) or categories on the Subscriptions page to receive a notification that a solution related to that product or category that is ready for review.

> **Note:** Earlier versions of Oracle Knowledge Management referred to Subscriptions as a Solution Authoring Profile.

Members who do not subscribe to any product or category, do not receive a notification, but they can search for all solutions in progress from the Solutions in Progress page. For information on how to set up and monitor a workflow, see the *Oracle Workflow Guide*.

Any changes that you make to Subscriptions become effective only after you click Save. If you want to restore the old settings after you have made changes, you can click the Revert button **before** you save the changes.

> **Note:** The system sends e-mail notifications only if you have set up and properly configured the Workflow mailer. You can also use the PHP Self Service Workflow notifications page to view notifications. For more information, see the Workflow documentation on how to start and configure the workflow mailer.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring > Subscriptions tab...Subscriptions page

Steps

1. To add a category, click Add Categories.

   The Add Categories page appears.

2. Locate and select one or more categories, by expanding and navigating the listing of categories and subcategories and then selecting the category's check box.

3. Click the Select button.

4. The Subscriptions page shows all categories that you have chosen.

5. To add items (products), click Add Items.

   The Add Items page appears.

6. Specify search criteria in the Name or Description fields to locate items.

   Under the Name and Description columns, matching results appear.

7. Click the Select button.

   The Subscriptions page shows all items (products) that you have chosen. Whenever the workflow processes a solution that refers to any of the subscribed categories or items, you should receive notification.

Update a Solution

After you save a solution or have submitted for review and approval, you might want to return to it to view any authoring comments that others have made and make revisions.

During the review and update process, you--the author of a solution--and any reviewers need to lock and update the solution to make changes. Reviewers might add authoring comments to advise you of required changes, or they might directly update the solution. After you or any participants have updated and saved any changes, you can resubmit the solution and specify the next authoring workflow step.

If you need to update a solution that another person has locked and that person is not available, your administrator can reset obtain the lock by clicking the **Get Lock** button. Then, the administrator can resubmit the solution for you to lock and update.

All new and edited solutions must be approved for publication. When you submit a solution in an authoring flow to the step that has the **publish** action, the solution status changes to **Published**. After publishing the solution, it must be synchronized with the index to appear in the search process.

For information on the specific areas of a solution, see Create a Solution, page 4-5. You can access solutions from the Solutions in Progress page.

The following procedures describe how to locate and access an available solution so that you can update it.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

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

Navigation

Navigate to the **Authoring** tab and then Solutions in Progress page.

Steps

1. Select a solution in progress from the View drop-down list.

   You can only access solutions you are working on or the ones you can lock and update.

2. Click the **Go** button. The solutions appear based on the view selected.

3. Click View icon for the solution to be updated. The solution overview appears.

4. Click either the **Update** button or the **Lock and Update** button.

   The Update Solution page appears. You can make your updates on this page. For example, you can modify the solution title, type, and visibility; change the authoring flow; create, update or remove statements; change the sequence of statements; add or remove related categories, items, or platforms; add, update, or detach attachments; add or remove task template groups; add or remove external objects; and add or review comments.

   To modify a solution that is submitted for review or is in one of the stages of authoring flow, click the **Unlock** button. The solution is then moved out of authoring flow. You must resubmit the solution after making changes to it.

   For more information about creating a solution, review the options and procedures that are available in Create a Solution, page 4-5.

   - If you change the authoring flow, you must resubmit the solution.

   - Select the **Update Statement for All Solutions** check box to update the statement in all solutions to which it is attached. If you do not select this check box, a copy of the original statement is created and attached to the solution in progress.

5. Click the **Save** button.

   After you have completed your solution updates, you can preview it and submit it for submission. For more information, see Preview Solution, page 4-12.

Review or Add Solution Comments

Anyone with appropriate access to modifying solutions can review or add comments to a solution from the Solution Detail page. Comments are a communication tool for knowledge workers during the solution authoring process and are intended to help reviewers provide feedback on a solution during the review process.

With the correct Responsibility, you can add comments on the View Solution Detail page.

Comments accumulate through different versions of a solution until publishing of the solution. After solution publishing, you can no longer view the previous comments, but you can add new comments.

All newly added comments have a **Not reviewed** status, which reviewers can change when they approve the solutions.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring > Solutions in Progress...Solutions in Progress page

Steps

1. From the View list, choose an item:

   • Solutions I'm currently working on.

   • Solutions in progress that I can lock and update.

   • All solutions in progress.

2. Click Go.

   Matching solutions appear based on the view that you chose.

3. On the row of the solution that you want to update, click the View icon.

   A view of the solution appears.

4. Click the Update button.

   The Update Solution page appears.

5. In the Authoring Comments area, click the Add Comment button.

   The Add Comment page appears.

6. Enter your Comments.

7. Click the Apply button.

   The Update Solution page appears.

8. Click Save.

   The comment appears with a status of Not Reviewed. After the comment is reviewed, the status changes to Reviewed.

Update the Status of a Comment to Reviewed

9. On the row that lists the comment, click the View icon.

   The Authoring Comment page appears.

10. In the Status field, choose Reviewed from the list.

11. Click the Apply button.

   The Update Solution page appears.

12. Click Save.

   For information on viewing solution details, refer to About the Solution Detail Page, page 3-15.

Working with Solutions in Progress

You can view or search for **solutions in progress** or draft solutions on the Solutions in Progress page. Solutions in progress include solutions that have been saved but have not been submitted for approval and solutions that have not been approved for publishing.

Topics about solutions in progress include:

- About the Solutions in Progress Page, page 4-22

- View Solutions in Progress, page 4-23

- Search Solutions in Progress, page 4-24

About the Solutions in Progress Page

From the Solutions in Progress page, you can:

- **Filter your view of solutions progress**: For more information, see Filtered Views of Solutions in Progress, page 4-23.

- **Search for solutions in progress**: Click the Search button. For more information, see Search Solutions in Progress, page 4-24.

- **Create a new solution**: For more information on solutions, see Managing Solutions, page 4-1.

- **Sort the view of solutions in progress**: Click any of these column headings to sort the list of solutions in progress accordingly: Number, Title, Type, Status, Locked by, Created, or Last Updated. Each time you click a column heading, the sort is either ascending to descending or descending to ascending.

- **View solution details**: On the row that lists a solution in progress, click the View icon to display the solution's details, including any authoring comments.

> **Note:** Click the **Return to Solutions in Progress** link to return to the Solutions in Progress page.

Filtered Views of Solutions in Progress

The filtered views of your solutions in progress include:

- **Solutions I'm currently working on**: Includes the solutions that you have created but not submitted for approval, or solutions that you have locked for review but have not submitted for approval.

- **Other solutions in progress I can lock and update**: Includes the solutions that are pending approval that you can lock and update.

- **All solutions in progress**: Includes all solutions that either some users are editing or are pending approval.

View Solutions in Progress

When you navigate to the Solutions in Progress page, the default view shows the solutions on which you are currently working. On the Solutions in Progress page, you have filtered views of your solutions in progress. You can also search for solutions in progress.

Security settings impact your access to solutions. You can update a solution only if you have access to the solution--such as being able to access at least one of the categories--and you have access to all statements. If due to Security setup changes, you lose access to a solution, there is a unlocking concurrent program that removes the lock that some users hold. Unlocked solutions appear in the Solutions in Progress view, such that you can update the solutions.

> **Note:** The unlocking concurrent program is **different from** the Get Lock functionality. This Get Lock functionality unlocks solutions that someone has locked.

The following procedures describe how to access and view solutions in progress in Oracle Knowledge Management.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring tab > Solutions in Progress...Solutions in Progress page

Steps

1. Change the view by choosing a filter value from the View list:

   • **Solutions I'm currently working on**

   • **Other solutions in progress I can lock and update**

   • **All solutions in progress**

     By default, the Solutions in Progress page shows all the solutions on which you are working. These are solutions that you have saved but have not submitted for approval.

2. Click Go.

   The filtered results appear when the page Solutions in Progress automatically refreshes.

3. To view detailed information about a solution in progress:

   1. Click the View icon on the row of the listed solution. The solution's details appear.

   2. Click the Return to Solutions in Progress link to return to the Solutions in Progress page.

Search Solutions in Progress

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

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring tab > Solutions in Progress...Solutions in Progress page

Steps

1. Click Search.

   The Search Solutions in Progress page appears.

2. Enter any one or more criteria to narrow your search of the solutions in progress:

   • **Number**: Searches for solution number entered by user.

   • **Title**: Searches solution titles for key words.

   • **Type**: Filters by solution types.

   • **Status**: Filters by solution status.

   • **Item**: Filters by product.

   • **Created after**: Specifies a date after which solutions were created. Click the Calendar icon

   • **Created before**: Specifies a date before which solutions were created.

   • **Updated after**: Specifies a date after which solutions were updated.

   • **Updated before**: Specifies a date before which solutions were updated.

   • **Search only within Solutions I may update**: Select check box to show only solutions that you can update.

   • Look for: (Select only one.)

     • **All Solutions**: Specifies all solutions regardless of checked-out status.

     • **Solutions not locked**: Specifies only solutions that are not locked.

     • **Specifies only solutions that a specific user has locked**: Specifies only solutions that a specific user has locked. Click the Flashlight icon to search for and select a user by either their Full Name or User Name.

3. Click Go.

   Results appear in the Search Results section of the page.

Solutions in Progress results appear in a summary table and include:

- **Number**: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.

- **Title**: Indicates the solution title or solution summary. Users can click the title to drill down to the solution details.

- **Type**: Indicates the solution type.

- **Status**: Indicates where the solution is in the approval cycle.

- **Locked by**: Indicates the user that currently has locked the solution.

- **Created**: Indicates the solution's creation date.

- **Updated Date**: Shows the most recent date on which the solution or statement was updated.

- **View**: View the solution details. For more information, see About the Solution Detail Page, page 3-15.

Set Up Recommended Solutions

Recommended Solutions is a list of solutions that knowledge workers recommend for users to review. Users accessing iSupport can view a list of Recommended Solutions that is set up within Oracle Knowledge Management. For this list to be effective, you should actively manage it.

> **Note:** You can add only published solutions as recommended solutions.

The following example describes how a manufacturer might decide how to use Recommended Solutions.

Example: Recommended Solutions

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

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

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Administrator

Prerequisites

Obtain the solution number that you want to recommend. For more information, see:

Using Simple Search, page 3-8.

Using Advanced Solution Search, page 3-19.

Navigation

Knowledge > Authoring > Recommended Solutions...Recommended Solutions page

Steps

1. To add a solution to the list, click Add Solution.

   The Add Recommended Solution page appears.

2. Enter the Solution Number.

3. Click Apply.

   The solution appears on the Recommended Solutions page.

4. To view details about the solution:

   1. Click the Details icon this is next to the solution. The Solution Details page appears.

   2. Click the Return to Recommended Solutions link to return to the Recommended Solutions page.

5. To rearrange the position of a solution, click the Move Up or Move Down icon that is on the solution's row.

6. To delete a solution from the list, click the Remove icon that is on the solution's row, and click the Remove icon.

Set Up Note Token Rules or AutoLinks

Setting up Note Token Rules in Oracle Quality Online lets you define parsing rules and destinations for hyperlinking keywords in the Note Details appear. This is an **AutoLink** in Oracle Knowledge Management.

AutoLinks define a set of key token words, for example, **bug**, thatmaps to an HTML object in the database. If you have created the word **bug** as a Note Token Rule, when

anyone authors a solution containing **bug** and an unique parameter (the bug number), for example, **bug: 10020**, Oracle Knowledge Management automatically creates a hyperlink to that object in the database.

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

> **Note:** For statement details with content type **Text with AutoLink**, you cannot use these characters as preceding or following characters: **-** (hyphen), **.** (period),and (space).

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

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

You can define different sets of Note Token Rules for agents and customers.

To leverage a token rule in Oracle Knowledge Management, you must map it to the Knowledge Base Solution object in the database. There are two types of objects to which you map the token rules. One object is **Knowledge Base Solution**, which applies to customers. The other object is **Knowledge: OA Solution**, which applies to Agents and Administrators. Existing rules are **not** mapped automatically during an upgrade. If you are using the same Note Token Rule for both customers and agents, then for Note Token Rules that you defined before the upgrade, you must map them to the new object, **Knowledge: OA Solution**.

You need a required special declaration for FND function that you use in a Note Token Rule. For rules that use the FND function, the function type needs to be of the **INTEROPJSP** type. The function definition also must include **&cskDLink=OA** in the function URL definition.

The following procedures describe how to create token rules.

Login

Self-Service

Responsibility

DEMS Administrator

Prerequisites

None

Navigation

Token Rules > Summary

Steps

1. Click Create Token Rule.

2. In the Name text field, type a unique Name.

3. In the Description text field, type a description.

4. In the Token section, type the keyword to hyperlink in the Value field, such as a name for the linked text.

5. Set Preceding and Following Delimiting Characters.

    The Preceding Delimiting Characters distinguish your token value from identical text values, and the Following Delimiting Characters determine where the hyperlink stops. Any combination of Following Characters are allowed between Token Value and Parameter, if any.

6. In the Parameter section, to choose a Parameter type--**Alphanumeric**, **Numeric**, or **No Parameter**--from the Type list.

7. Enter the Following Delimiting Characters for the parameter, if desired, or select the appropriate delimiting check boxes.

    If you do not select No Parameter, then the Following Characters, Minimum Length, and Maximum Length options are not allowed.

8. Enter your minimum and maximum length parameters.

9. In the Destination section, choose a Type from the list.

    *   **Function**: Choose a User Function Name using the list.

    *   **URL**: Enter the base URL in the Base URL text field.

10. Click Create.

    The token rule appears on the Token Rules summary page.

    Map a Token Rule to an Object

11. To map a token rule to an object:

    1. Click the Mapping tab. The Token Rule Mapping page appears.

    2. Choose the Knowledge Base Solution value from the Object list and click Go. The values that have already been mapped to the object populate the page.

    3. In the Sequence field, type a number.

4. Choose the Token Rule that you created from the Rule list.

5. Choose a Start Date.

6. Choose an End Date.

7. Click Update. The token rule is mapped to the Knowledge Base Solution object.

Part 3

Customer Flows

This part contains the following chapter:

5

Managing Search--Customer Flow

This chapter covers the following topics:

- Using Basic Search--Customer
- Using Solution Advanced Search--Customer
- About Solution Details--Customer
- About Searching with Integrated Products--Customer Flows

Using Basic Search--Customer

This chapter includes procedural information about the search functionality for the **end-customer** who accesses Oracle Knowledge Management from other modules, such as iSupport. For more information, see the Overview topic for agents and administrators, page 3-1.

Another part of Oracle Knowledge Management covers **agent** and **administrator** search processes and procedures. For more information, see Managing Search for agents and administrators, page 3-1.

Basic Search lets you enter key words to perform a search for solutions across multiple repositories within the knowledge base. The default repositories in the customer-facing search are: Solution, Solution Categories, Forum, and Library. Because of its key word based interface, Basic Search is accessible to users of all levels of experience. The Basic Search matches the words that you enter across the header and body of the solution.

> **Note:** Other versions of Oracle Knowledge Management refer to the Basic Search as either the **Simple Search** or the **Unified Search**. Also, other versions of Oracle Knowledge Management refer to **Product** as **Item**. The customer-facing material in this section refer to **Basic Search** and **Product**.

The Basic Search keyword matching differs across repositories. It matches the header and body for Solutions, but only the header for Service Request.

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

Basic Solution Search Process Diagram
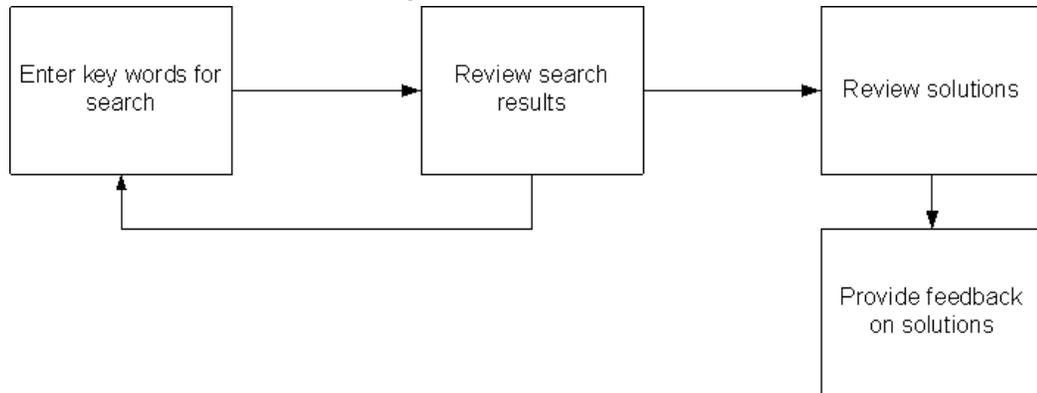
Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security in *Oracle Knowledge Management Implementation and Administration Guide*.

Use this procedure to perform a Basic Search. Refer to your module's documentation for login, responsibility, and prerequisite information. The following procedures demonstrate access to Oracle Knowledge Management from the Oracle iSupport module.

> **Note:** The following procedures are for **customer-flows**, such as accessing Oracle Knowledge Management from another module. If you are accessing Oracle Knowledge Management using the agent-flows rather than the customer-flows, see Using Simple Search--Agent, page 3-8.

Login

jtflogin (for the integrated module)

Responsibility

(See other module documentation.)

Prerequisites

(See other module documentation.)

Navigation

Support tab > Ask Me tab...Knowledge Base page

Steps

1. In the Search field, choose a repository from the list.

To perform a search across all available repositories, choose **All**.

2. In the Search field that is to the right of the Search list, enter text search criteria to narrow down your search.

   For example, to search for a solution regarding a printer type the word **printer**.

3. In the Using field, choose one:

   - **Any of the words**: To match one or more words in any sequence.

   - **All of the words**: To match all words in any sequence.

   - Exact Phrase: To precisely match word-by-word in the same sequence.

     Note: Depending on your setup, the Using field might not be available.

4. In the Product field, click the Flashlight icon to search and select a product.

5. Click Go.

   Results appear in the Search Results section and appear by repository in tables. When searching all repositories, results appear in tables, such as:

   - Solutions, page 5-3

   - Solution Categories, page 5-3

   - Forums, page 3-12

Solutions

Search results for the Solutions repository include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Title**: Indicates the solution title. You can click the title to drill down to the solution details.

- **Solution Number**: Displays the matching solution number, which is a unique reference for the solution.

- **Updated Date**: Shows the most recent date on which an update occurred.

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

Category

Search results on for Categories repository include:

- **Score**: Shows how closely the results match the query key words entered. Oracle

Knowledge Management uses various criteria to determine a score.

- **Name**: Shows the category name and hierarchy.

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

Forums

Search results for the Forums repository include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Title**: Indicates the forum title. Click a title to see its contents.

- **Updated Date:** Shows the most recent date on which the forum was updated

To display the Message Content page, click the corresponding Forum.

Browse Categories--Customer

You use Categories to organize solutions into logical groupings or subject areas. Using the analogy of a library, you could:

- Characterize fiction as a category

- Characterize mysteries and classics as subcategories

- Compare books to solutions

- Compare book titles to solution titles.

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

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

Browse Categories Process Diagram

Use this procedure to browse categories.

Login

jtflogin (for the integrated module)

Responsibility

(See other module documentation.)

Prerequisites

(See other module documentation.)

Navigation

Support tab > Ask Me tab...Knowledge Base page

Steps

1. Choose a Category such as Appliances.

    The Solution Category page appears.

2. Choose a Category (a subcategory) or a Solution.

    Solutions appear in the Solutions section under the Solution Category section.

3. To filter solutions by when they were last used, choose a time frame value from the View list.

    Examples of your choices can include: this week, this month, the past 3 months, the past 6 months, this year, the past 2 years, and all.

    > **Note:** You can also perform a keyword search by entering a key word in the Search Solution field. By selecting the corresponding option button, you can specify whether the search should include All Solution Categories or Only in the Current Category.

Solution Results within a Category

The Solution results that are within a Category appear in a summary table and include:

*   **Title**: Indicates the solution summary. Users can click on the title to drill down to the solution details.

*   **Number**: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.

*   **Last Updated**: Shows the last date on which the solution was updated

Click the corresponding title to display the Solution Detail page.

Using Solution Advanced Search--Customer

Solution Advanced Search searches solutions in the knowledge base to let you find solutions using statements as criteria. In addition, you can specify attributes of the

solution, such as keywords, Products, Platforms, Categories, and Statement Types as search criteria. Being able to specify statements as criteria means that you can use existing statements to find a solution.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access.

Related Topics

Solution Advanced Search Criteria and Conditions, page 5-6

Perform Solution Advanced Search, page 5-7

Solution Advanced Search Criteria and Conditions

The following summaries provide an overview of the search criteria and conditions that you can use in an Solution Advanced Search.

Searching Method

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

For more information, see Display Search Option List, page B-1.

Solution Type

Solution types help organize solutions within the knowledge base. A profile option determines the default solution type.

Choosing a solution type returns only statements of this type.

Filter Types

Adding a filter to the search criteria, limits the result set. When you create a solution, you can assign the solution to Categories, Product Types, or Platforms. You can use these groupings as filters during a Solution Advanced Search.

Examples of Filters include:

- **Solution Category**: Hardware

- **Product Type**: Envoy Laptop

- **Platform**: Linux

Typically, only computer technology companies use Platforms. Your administrator can hide the Platform attribute throughout the knowledge base by setting the Knowledge: Display Platform Attributes profile option to No.

Selecting a filter returns solutions that are associated to these Categories, Products, and Platforms. You can use multiple filters during a Solution Advanced Search.

Statements are the basis of the Solution Advanced Search. Types of statement searches include:

- **Matching Statements**: A text-based Matching Statements search searches the titles and descriptions of statements in the database to find similar statements.

- **Related Statements**: A Related Statement search finds other statements that have been used in a solution containing a selected statement. You can execute a Related Statement search only if you have selected at least one matching statement.

You can choose from the following search options:

- Search Solutions

- Search Related Solutions

Search Solutions

Search Solutions is a text-based search that searches both solutions containing keywords in the Statement section and the solutions that relate to any statements that you have selected in the statement section.

Search Solutions finds all solutions that match the search criteria. By default, you use this search most of the time.

Search Related Solutions

This search is based on the links that the selected statements have to solutions. Any solution that has a relationship with any of the selected statements appear in the search results. Whenever the authors of solutions and statements use statements in a solution, they also create relationships between a statement and a solution.

The Score reflects the number of selected statements that each solution search result contains. Solutions having most of the selected statements have higher scores.

Search Related Solutions finds all solutions that contain the specified solutions.

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

Related Topic

Perform Solution Advanced Search, page 5-7

Perform Solution Advanced Search

The following procedures describe how to perform an Solution Advanced Search for customer-facing flows, such as accessing Oracle Knowledge Management from another module, such as Oracle iSupport. If you are an agent--such as a knowledge

worker--who is accessing Oracle Knowledge Management from within Oracle Knowledge Management, see Using Advanced Solution Search--Agent, page 3-19.

Login

jtflogin (for the integrated module)

Responsibility

(See other module documentation.)

Prerequisites

(See other module documentation.)

Navigation

Support tab > Ask Me tab...Knowledge Base page

Steps

1. Click the Solution Advanced Search button.

   The Solution Advanced Search page appears.

2. Under Conditions, choose a Solution Type from the list.

   Your choices of Solution Type can vary, but typical examples can include: Symptom-Cause-Action, Problem-Solution-Results, Problem-Fix, and so on.

3. To add filters:

   1. In the Filters, area, choose a filter type from the list. Your choices can include: Solution Category, Platform, or Product.

   2. Click Add.

   3. If you chose Solution Category, the Select Solution Categories page appears.

      • Navigate the Solution Categories tree by expanding or collapsing category branches, and select one or more corresponding check boxes.

      • Click the Update button to add the selected filter or filters. The selected categories become search criteria.

   4. To add a Product filter, choose Product from the list.

      • Click Add. The Select Product page appears.

      • In the Name or Description fields, enter text criteria to narrow your search for Products, and click the Search button. Matching results appear.

      • Select one or more corresponding check boxes to specify Products as search criteria.

- Click Update to add the Product filters. The selected Products become search criteria.

5. To add a Platform filter, choose Platform from the list.

    - Click Add. The Select Platform page appears.

    - In the Name or Description fields, enter text criteria to narrow your search for Products, and click the Search button. Matching results appear.

    - Select one or more corresponding check boxes to specify platforms as search criteria.

    - Click Update to add the Platform filters. The platforms become search criteria.

4. To add a matching statement:

    1. In the Type column, choose a Statement type.

    2. In the Summary field, enter a keyword or statement.

    3. Click Match Statement. The Search and Select: Matching Statements page appears.

        - To specify a statement, select the option button that corresponds to the matching statement. You can select only one matching statements at a time.

        - Click Select. The statement becomes search criteria.

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

5. To add a related statement.

    1. After adding a matching statement, click the Search Related Statements button. The Select Related Statements page appears.

    2. Select check boxes that correspond to the related statements.

    3. Click Select. The statements become search criteria.

6. Review your Filter and Statements and ensure that you have selected the check boxes for each item that you want to include.

7. Clear the check boxes of items that you want to exclude from search criteria.

8. Click the Search Solutions button.

   Results appear in the Results: Solution section on the Solution Advanced Search page.

9. Alternatively, click Search Related Solutions to search for solutions that contain the selected statements.

Solution Advanced Search Results

The Solution Advanced Search results appear in a summary table and include the following:

- **Score**: Shows how closely the results match the query

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

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

- **Usage**: Indicates how many times the solution has been viewed.

- **Last Updated**: Shows the last date on which the solution or statement was updated

- **View**: Allows you to view the Solution Detail page

      Note: You cannot sort the Usage or View columns.

About Solution Details--Customer

Whenever you view a knowledge solution within Knowledge Management or from another module--for example, Oracle TeleService, Oracle iSupport, or Oracle Depot Repair--the information appears on the Solution Detail page.

The Solution Detail page identifies important information about the solution including what the solution is about (statements), the type of solution, and its authoring history. Information also shows how the solution applies to specific Products, Categories, and Platforms, as well as details that show the external links--such as Service Requests, Repair Orders, and so on--and attachments.

Also, Task Group Templates may have been activated with a solution. Solution detail can include these tasks which are a description of how to perform action on a solution. An example of a task is **schedule a field service representative**.

Information that identifies the solution and its history appear in the header. The header

includes:

- **Type**: Indicates the solution type.

- **Last Updated**: Indicates when the solution was most recently updated.

The elements that comprise the solution include:

- **Categories**

- **Products**

- **Platforms**

- **Statements**

> **Note:** Statements are the most critical information in the solution.

- **Attachments**

- **Related Documents**

- **Comments**

For more information about these elements, see Create a Solution, page 4-5.

You can submit comments to the solution. In addition, you can indicate whether a solution **solves your problem**. The system captures responses in **usage counts** within Knowledge Management.

With the correct Responsibility, you can add comments on the View Solution Detail page if you have the permission **CS_Solution_View_Internal**.

Comments accumulate through different versions of a solution until publishing of the solution. After solution publishing, you can no longer view the previous comments, but you can add new comments.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access.

About Searching with Integrated Products--Customer Flows

Several modules within the Oracle E-Business Suite integrate with Oracle Knowledge Management, allowing users to search the knowledge base from other modules. The following table lists Oracle E-Business Suite modules that integrate with Oracle Knowledge Management searches by way of customer flows.

For information on Oracle E-Business Suite modules that integrate with Oracle Knowledge Management by way of **agent flows**, see About Searching from Integrated Modules--Agent Flows, page 3-35.

Search Integrations from Customer Flows

E-Business Suite Product	Search Integrations
Oracle iSupport	iSupport users can access Knowledge Management pages from the Support tab in iSupport. For information on using iSupport see the latest version of the *Oracle iSupport User Guide*.
Oracle Partners Online	Partners Online users access iSupport pages. For information on using Partners Online or iSupport see the latest versions of the *Oracle Partners Online User Guide* and the *Oracle iSupport User Guide*.

A

Frequently Asked Questions

This appendix covers the following topics:

- Frequently Asked Questions

Frequently Asked Questions

What is Oracle Knowledge Management?

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

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

Oracle Knowledge Management prevents duplication of effort and poor decision making due lack of quality information. Oracle Knowledge Management improves communication, reduce costs, and to develop competitive advantage.

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

A good knowledge management system helps build strong customer relationships by enhancing the customer experience with a company's product or service. The Oracle Knowledge Management module is an important part of any complete customer support module. It allows customer support representatives to match the problem that

they face with the problems that have been previously experienced and recorded. Reuse of existing problem descriptions and solutions, improves customer service efficiency.

What is the business need of Oracle Knowledge Management?

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

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

What is it aimed to do?

Oracle Knowledge Management aims to:

- Reduce support operation costs.

- Retain profitable customers.

- Address diverse customer needs by providing the information to meet those needs.

- Empower customers to help themselves through Web self-service 24 x 7.

- Increase customer satisfaction.

- Increase support agent satisfaction and retention.

Why is this important?

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

Are there any techniques to help in searching the knowledge base effectively?

You can use the Advanced Solution Search functionality, or the category headings on the Simple Search page to reduce the number of solutions for your query. A search performed by entering a word or a phrase in the Simple Search page searches the entire knowledge base.

What search method should I use, if I do not know the Solution Number?

If a Solution Number is not known, then you can use the keyword search. This search is not case sensitive. More keywords result in a narrower search. Enter appropriate

keywords for quicker and more specific results.

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

There is currently no way to check in a solution. You must submit a solution back to a workflow.

How do I publish a statement?

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

What is the Oracle Trading Community?

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

Does Oracle Knowledge Management support different languages?

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

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

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

How do I customize Oracle Knowledge Management?

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

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

No.

Where are the documents in Oracle Knowledge Management stored?

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

How are attachments to solutions in Oracle Knowledge Management stored?

Attachments are stored on the database.

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

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

You also must verify the Visibility Level. To view restricted solutions, you need to have the role with View_Solution_Restricted permission.

While doing a knowledge base Search, why can I not find statements that I used in creating a solution?

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

- You cannot search draft solutions and statements in Simple Search or Advanced Solution Search.

- You can only find in-progress solutions in the Solutions in Progress pages, including the search for solutions in progress.

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

B

Display Search Option List

This appendix covers the following topics:

- Searching Methods

Searching Methods

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

The Knowledge: Default Searching Method profile option determines the default search option used in both Advanced Solution Search and Simple Search (also known as Unified Search). Accumulate is the default searching value.

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

- **All Keywords**: This search uses the AND operator. The search results must match all terms in the query. For example, if you enter *Oracle server* as a search query, Oracle Knowledge Management would read it as *Oracle* AND *server* and send it to Oracle Text.

- **Any Keywords**: This search uses the OR operator. This search can match one or more query terms.

- **Reference Number**: Every solution in Oracle Knowledge Management is assigned a unique number. This search finds the solution that is associated with the number entered in the search query field.

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

Glossary

Action

An Oracle 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, category, and forum message based on a keyword.

Boolean

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

Category

A folder containing a set of related solutions.

Cause

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.

Dynamic Linking

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

End Date

End-dating a statement or solution type 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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