Oracle Fusion Service

Administering Knowledge Management

Oracle Fusion Service
Administering Knowledge Management

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There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons ⓘ to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

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Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide is intended for administrators who need to manage users and locales, and perform ongoing knowledge management operations and maintenance tasks.

To set up and work with the additional features of Oracle Sales Automation and Fusion Service, see the product documentation on Oracle Help Center at https://docs.oracle.com. To set up and work with additional features of Oracle Global Human Resources, see the product documentation on Oracle Help Center at https://docs.oracle.com.

> **Note:** With release 20A (11.13.20.01.0), "Oracle Engagement Cloud" is now known as Oracle Fusion Cloud Sales Automation. Existing Oracle Engagement Cloud users will retain access to Oracle Fusion Cloud Sales Automation features under their preexisting licensing agreements. Any new users created within your current Oracle Engagement Cloud license count will also retain the same access to Oracle Fusion Cloud Sales Automation. To obtain additional features or manage your subscription, refer to your Oracle Cloud Applications Console.

This document describes features available to users under Oracle Fusion Cloud Sales Automation, Oracle Fusion Service, and Oracle Engagement Cloud licensing agreements.

Related Guides

Refer to the related guides listed in the following table to understand more about the information covered in this guide.

Title	Description
Oracle Fusion Service Implementing Knowledge Management	Describes how to set up knowledge management components and features.
Oracle Fusion Service Using Knowledge Management	Describes how to use knowledge management components and features.
Oracle Fusion Service Implementing Service Center with the Classic User Experience	Describes how to set up service components and features.
Oracle Fusion Cloud Sales Automation Implementing Sales	Describes how to set up and configure Sales.
Oracle Fusion Service Using Service Center in the Classic User Experience	Describes how to use service components and features.

Title	Description
Oracle Fusion Cloud Sales Automation Using Sales	Describes how sales managers, salespeople, and other sales users can use sales components and features in their business.
Sales and Fusion Service Creating and Administering Analytics	Describes how administrators can build and edit analytics.
Oracle Fusion Cloud Applications Using Common Features	Provides information on how to use features that are common across Oracle Fusion Cloud Applications.

Related Topics

2 Administer Knowledge

Administer Knowledge

Administering the knowledge application involves several day-to-day tasks to set up and run the application across locales. You control locale access, define content types, manage users, and so on to ensure a smooth operation of your business.

You can perform these tasks to administer the knowledge application:

- Import content from an existing knowledge base.
- Manage locales for the application by activating and deactivating them.
- Specify the locales that authors have access to.
- Define new content types to add new types of articles to the knowledge base.
- Manage application users.
- Configure the My Knowledge page for your organization.
- Manage the jobs that update search as the knowledge base changes.

Knowledge Offering

You can implement Knowledge in Service and HR Help Desk. Knowledge helps administrators and authors to create and manage a knowledge base, which agents can use to resolve service requests. General users can use My Knowledge as a central location to locate and view knowledge.

The following table shows the primary functional areas of the Knowledge offering. For the full list of functional areas and features, see the Associated Features report that you review when you plan your implementation.

Functional Area	Description
Knowledge Locales	View, enable, disable locales, and configure the default locale.
Users and User Groups	work with roles, privileges, policies, and knowledge user groups to set up and maintain users for your application.
Content Types	Define the types of articles for your database.
Articles	Create, edit, publish, translate articles in your knowledge base.
Collections	Create and manage groups of documents from web sites or document repositories.

Functional Area	Description
Search Dictionary	View, edit, and add concepts and synonyms to the dictionary to enable a quick search of the knowledge base.
Analyze Knowledge	Use prebuilt dashboards to understand how authors are creating, updating, and publishing knowledge base articles.

Service administrators and account administrators must use qualified accounts, such as Application Implementation Consultant, to implement Knowledge. Qualified accounts must have sales administrator, customer service manager, and knowledge manager roles assigned to them.

Implementing Knowledge involves the following:

- Enabling the knowledge management functional area.
- Enabling knowledge management features in service requests.
- Configuring knowledge management capabilities for service requests and the My Knowledge page.
- Scheduling the processes that synchronize categories and products with Service and HCM, and update search with changes to knowledge base content.
- Setting up locales so that the knowledge base supports the languages and regions that your users need.
- Setting up knowledge users so that they have access to the appropriate knowledge functions.

> **Note:** After you complete the implementation, see the Administer Knowledge section to learn more about important administration tasks.

Inactive Knowledge Profile Options

When you enable Knowledge features by setting profile options in the setup and maintenance area, you may see profile options that are not mentioned in any of the setup topics. These options have `CSO_NOTIFICATIONS` in their option code (for example, `CSO_NOTIFICATIONS_EXPIRED`). They are inactive, and do not enable any available functionality in the Knowledge Management offering.

Import Content from an Existing Knowledge Base

You can import content from an existing knowledge base into Knowledge Management using the knowledge management REST API.

If your organization has an existing knowledge base, you can use the **Create content from import** method to import its content into your application. You can use the **Create content from import** method as part of a larger process that your organization designs to extract content from your existing knowledge base, transform it to the correct format, and import it into the application.

You can find more information on using this method in the Create content from import section of the REST API for Knowledge Management in Oracle Fusion Service guide.

Overview of Knowledge Locales

Locales help you to differentiate knowledge content by language and country or region. This differentiation helps you make Knowledge available to users who speak varied languages and are located in different countries or regions.

Each locale represents a base language and a specific national or regional variation of it. Important differences among locales can include regulations, procedures, addresses, currencies, date formats, and country- or region-specific terms.

Knowledge is available for use in all locales supported by the application. You can use Knowledge with multiple locales by activating the locales that you want to use. Authors, translators, agents, end-users, and knowledge managers can use or manage knowledge in any of the locales that they have access to. Knowledge is configured to have a default locale. You can change the default locale to one that best meets your organization's needs.

Related Topics

- Enable Locales
- List of Available Locales
- Set the Default Locale
- Preferred Locales for Users

Enable Locales

You can view, enable, and disable locales from the Manage Locales page. You can search for specific locales, and list either all locales, active locales, or inactive locales.

1. Go to **Setup and Maintenance**.
2. Select **Service** from the Setup drop-down list.
3. Select **Knowledge Management** from the functional areas.
4. Select the **Manage Knowledge Locales** task.
5. Select the check box of the locale that you want to enable.

You can disable a locale by clearing the check box. When you disable a locale, users cannot search for or browse the articles in the locale, and authors can't add or update its contents. Articles in disabled locales stay in the database, and you can re-enable a locale to make its contents available to users again. You can permanently delete a locale by deleting all of the objects in the locale, then disabling it.

Note: You can't disable the default locale.

Default Preferred Knowledge Locale

You can specify a default preferred knowledge locale, so that users who do not set their own preferred knowledge locale will see, by default, knowledge content in the locale that you set.

If you don't set a default preferred knowledge locale, users who don't set their own preferred knowledge locale will see knowledge in the locale that corresponds to their language and territory preference.

For example, suppose your company uses knowledge in only one locale, English-Australia, but has employees in another country, such as Taiwan. Employees in Taiwan might have their language preference set to Traditional Chinese and their territory preference set to Taiwan.

Since knowledge content exists only in the English-Australia locale, employees in Taiwan need to have their knowledge locale set to English-Australia in order to use knowledge. There are a few ways to do this:

- If you set the default knowledge locale to English-Australia, employees in Taiwan will see knowledge in this locale by default. They can use knowledge without making any changes.
- Users can set their own preferred knowledge locale to English-Australia. They can use knowledge once they make this change.
- Users can manually select the English-Australia locale in the search area whenever they use knowledge. If they don't select this locale, they will not see any search results.

Now, suppose your company has knowledge in more than one locale. You can set the most commonly used locale as the default preferred locale, and individual users can set their own default knowledge locale to any other supported locale as it suits them.

Related Topics

- Set a Default Preferred Knowledge Locale

How do I assign locales to authors?

You must assign at least one locale to every author so that they can work in Knowledge. Authors can create and manage articles only in the locales assigned to them. You can see and update authors' locales on the Knowledge Users page.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

1. Select Knowledge Users from the navigator.
2. Locate the authors you want to update. You can use partial or complete user names or IDs to locate authors.
3. Select the locales that you want to add or remove and click the arrow icons to move the locales to or from the assigned column. You can select multiple locales in a single operation, or select all of the locales using the double arrow.

Set a Default Preferred Knowledge Locale

You can set a default preferred knowledge locale for your business. Users who do not set their own preferred knowledge locales will see content in this locale instead of in the default knowledge locale.

1. Open **Setup and Maintenance** and select the **Service** offering.
2. Select **Knowledge Management** and then select **Manage Knowledge Locales**.
3. Select a default preferred knowledge locale.
4. Click **Keep Changes** on the warning message if you are fine with the impact.

> **Note:** If you deactivate a locale that was set as the default preferred knowledge locale, the application automatically sets the default preferred knowledge locale to none.

Related Topics

- Default Preferred Knowledge Locale

Enable Article Statuses

You can use article statuses to mark milestones along the way to publishing an article. Article statuses let contributors and approvers know what work still needs to be done.

You can use the predefined statuses or create additional statuses if you want. You must enable the feature to make the predefined statuses available to authors.

The application has these predefined article statuses:

- Approved
- Draft
- Published
- Rework
- Technical Review
- Work in Progress

You enable Article Statuses on the Manage Knowledge Article Status page. You must enable the feature to make the predefined statuses available to authors.

1. Go to Setup and Maintenance and select Service from the Setup drop-down list.
2. Select Knowledge Management from the functional areas, and select the Manage Knowledge Article Status task. The Manage Article Statuses page displays.
3. Select the Enable Article Statuses option.

Define Article Statuses

You can define your own article statuses. You must localize each user-defined article status for each active locale.

1. Go to **Setup and Maintenance** and select **Service** from the **Setup** drop-down list.
2. Select **Knowledge Management** from the functional areas, and select the **Manage Knowledge Article Status** task. The **Manage Article Statuses** page displays.
3. Click the **+** sign to add a new status.
4. Enter the Article Status Name.
5. Add a localized label for the new status for each locale listed. For example, if you add a new status of Legal Review in English, and if your company also uses the locales English, US, and English, CA, it would look like:
    - **Legal Review - English, US**
    - **Legal Review - English, CA**

You can deactivate an article status if it is not used in the latest version of an article. Clear the Active check box to deactivate a status. You can delete an inactive user-defined article status by clicking the X but you can't delete a predefined status.

Related Topics

- Enable Article Statuses

Content Types

Content types define the various types of articles in your knowledge base. A content type definition serves as an authoring template for articles that serve a specific purpose. For example, the application has prebuilt content types for solutions and FAQs.

You can define any number of content types and vary the elements that they contain, including:

- Content elements, including the title, and the text fields that make up the body of the article.
- Locale-specific article and field-level titles and descriptions.
- Products and categories that are relevant to the content type.
- Visibility to audiences at the article and field levels.

Create Content Types

As a knowledge manager you can define content types. You define content types by defining the content type, defining the schema for the content type, and defining the content schema details.

1. Select Setup and Maintenance from the navigator, and from the Setup menu, select the Service offering.
2. Select the Knowledge Management functional area and select Manage Knowledge Content Types.
3. Click the + symbol to begin creating the content type.

Supply Basic Information

You define the content type by supplying basic information, including a name, an optional description, a prefix ID, and names and descriptions for additional knowledge base locales, if required. You also need to select an application for the content type. The application you select for the content type also determines the products and categories that authors can assign to articles, and which users can access the articles. For example, if you define a content type called "Manual", and assign it to the Service application, then authors will be able to assign only Service products and categories to these articles, and only Service users will be able to access them.

The application automatically assigns a reference key based on the content type name. If you change the content type name after you initially enter it, you can edit the reference key to match the edited name prior to saving the content type data. The description is visible as placeholder text that authors see when creating articles. The prefix ID forms the first part of the article ID that is automatically created for each article in the knowledge base. The prefix helps to identify articles belonging to a specific content type. For example, you might use the prefix NA for a News Article content type. You can use numerals and letters in your document ID prefix.

1. Enter a name for the content type.
2. Enter a prefix for the ID number that the application will automatically assign to each article.
3. Enter an optional description.
4. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.
5. Select a department for the content type.

Define the Content Schema

The content schema describes the structure of the articles in the content type. You define the schema by defining the individual elements that make up an article. For example, you might define the elements of a news article content type to include the elements title, summary, body, and related information.

You can restrict the visibility of fields to specific users. For example, you might need to define a product support document that includes information that only agents should have access to. Select the user groups from the available list and move them to the selected list. In the available list, you will see only the user groups that are mapped to the department you selected in the previous step. If you do not select any user groups, then the field will be visible to all users.

You can select the type of content that the field will accept. Use the field type to select text or full rich text. Text fields support simple text entry. Full rich text fields have a full featured text editor that supports complex formatting and markup, as well as images. You can also specify whether authors must enter content in a field, or whether they can leave the field empty.

You define the content schema by defining the title field, the additional fields that you need, and optionally enabling attachments to the content type. There is no limit to the number of fields that you can add to a content type. There is no size limit for individual articles, and article size does not have an impact on the application's performance.

1. Enter a title or accept the default. The title field is required for all content types.
2. Enter an optional description for the title field.
3. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.

You define the additional fields by supplying the necessary information for each element or field that your content type requires.

1. Click the + sign to add additional fields.
2. Enter a name and description for each field.

3. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.
4. Click the visibility icon to optionally restrict this field to internal users only.
5. Select the field type to define the text requirements for each field.
6. Click the check box to specify that authors must enter content in this field.

Select the option to enable file attachments if you want users to be able to attach files to the content type.

Change the Article Rating Types

You can change the rating type for articles from the default 5 Star rating type to the Like or Dislike rating type.

1. Open Setup and Maintenance.
2. Select the Service offering and then select Knowledge Management.
3. Select the Manage Knowledge Common Profile Options, and for the CSO_CONTENT_RATING_TYPE profile option, select the desired rating type from the profile value drop down list.

Enable and Disable Search Filters in My Knowledge

You can enable and disable search filters in My Knowledge so that users can restrict the search results to products, categories, or content types. Search filters are enabled by default in Service > My Knowledge, and Help Desk > My Knowledge.

To enable or disable search filters, you must have the FND_VIEW_ADMIN_LINK_PRIV privilege and the appropriate role for the page. For example, if you want to configure Service > My Knowledge, you must be a customer service representative or customer service manager.

Note: Search filters are not available in Knowledge > My Knowledge.

1. Sign in to the application and click the user icon on the top right, and then select Settings and Actions > Manage Sandboxes.
2. Create a new sandbox and set it as active, or select an existing sandbox and activate it.
3. On the home page, select Service > My Knowledge or Help Desk > My Knowledge.
4. Click the user icon on the top right, and select Administration > Edit Pages.
5. In the Edit Pages dialog, hover the mouse over **Edit Layer** and select **Site** or **Global** and click OK.
6. Click the Show Advanced Search icon to view the product, category, content type, and locale filters.
7. Click the edit icon next to an option, and in the component properties box, select or deselect **group** to hide or show the option.
8. Optionally, you can modify the display options and style of the component as desired.
9. Click OK.

You can reorder the options and change their sequence on the page.

1. Click the **Select** tab at the top of the page.
2. Drag the mouse to select all of the components, and then select **Edit Component**.
3. In the component properties box, select the children tab. Reorder the options using the up and down arrows, and click OK.

Enable File Attachments

Authors can attach one or more files, such as product manuals, data sheets, and videos, to a knowledge article to make them available to agents and end-users. Authors can also update and remove attachments from articles.

You must enable file attachments for each individual content type that you want authors to be able to attach files to. You must also enable content processing of file attachments so that their contents will be matched to users' search terms. You can view and edit the list of supported file types, and change the display titles of the attachments uploaded by authors.

An article can have up to 20 attachments with a maximum file size of 100MB for each attachment. Most common business file types, including office documents (.doc, .docx, .odt), PDF (.pdf), and video (.mp4) are supported by default.

The search processes attached files and matches terms in user questions to their contents. When agents search for a term from My Knowledge and Service Request Knowledge pages, the application fetches not only the articles that match the search term but also the attachments files associated to articles that include the term. File attachments are included as separate document type in search results. For file attachment search results, agents can perform a few actions like inserting the link to the file attachment in a service request message. The link to the article is inserted in the message in this case.

Related Topics

- Enable File Attachment Content Processing
- Configure File Attachment Types

Configure File Attachment Size

Authors can attach one or more files, such as product manuals, data sheets, and videos, to a knowledge article to make them available to agents and end-users. Authors can also update and remove attachments from articles. An article can have up to 20 attachments with a maximum file size of 100 MB and the most common business file types, including office documents (.doc, .docx, .odt), PDF (.pdf), and video (.mp4) are supported by default.

1. Open **Setup and Maintenance**.
2. Select the Service offering and then select **Knowledge Management**.
3. Select the Manage Knowledge Search Profile Options.
4. Select the CSO_FILE_SIZE_LIMIT profile.

   For example, if the profile option is set to '10' it will limit attachments over 10 MB. An article can have 20 attachments. The sum of all those attachments must be under 10 MB. It is not the individual attachment size.
5. Define the Profile Value for each Profile Level.
6. Click **Save**.

Manage Search Content Processing Jobs

You can start content processing jobs, view the status of currently running and completed jobs, and view log details of completed jobs.

The Content Processing page lists the jobs that are currently running or completed. For each listed job, the page displays the type of job, the start and end time, the total time that the job ran, and its completion status. You can refresh the page to update information on currently running jobs.

There are two types of content processing jobs:

- Incremental jobs process only documents and dictionary concept changes that have been updated since the completion of the previous job. Incremental jobs should run every 15 minutes.
- Full jobs process all documents, whether updated or not, and all dictionary concept changes.

Incremental content processing jobs are managed as scheduled processes by the Knowledge Search Batch Process job. The value of the Knowledge Search Batch Processing job should be set to 15 minutes. This value ensures that incremental jobs will run every 15 minutes. Full jobs can be run on-demand as required. You can view the log summary for a completed job.

Related Topics

- When do I schedule knowledge processes?

Enable Intelligent Advisor Interviews in Knowledge Articles

You can integrate Oracle Fusion Cloud Sales Automation and Intelligent Advisor so that knowledge authors can add interviews to articles. Intelligent Advisor is a suite of tools used to build smart interactive interviews that support your organization's business policies.

When Intelligent Advisor is integrated, authors can add interviews when they create or edit articles. When authors or reviewers open the article in the authoring application, they will see the interview just as self-service users will. Self-service users can respond to embedded interview questions from within the article, and their responses are processed by the intelligent advisor application in real time, enabling them to complete the interview to answer their question and resolve their issue.

When Intelligent Advisor is integrated, authors can add interviews when they create or edit articles.

You can learn more about integrating Oracle Fusion Cloud Sales Automation with Intelligent Advisor by reading the "Intelligent Advisor" section of the Oracle Fusion Cloud Sales Automation Implementing Sales guide.

Related Topics

- Oracle Intelligent Advisor

Enable File Attachment Content Processing

You must enable file attachment processing so that the contents of file attachments will be matched to users' search terms.

When users search in the service request knowledge panel, or in My Knowledge, the application will match their search terms to the contents of file attachments as well as articles. File attachments are included as separate document type in search results.

Note: Contents of video file attachments cannot be processed.

1. Navigate to Other, Setup and Maintenance.
2. Select Service, Knowledge Management, **Manage Knowledge Search Profile Options**.
3. Select **Yes** for the profile value CSO_ENABLE_INDEX_ARTICLE_ATTACHMENTS.
4. Navigate to Service, Knowledge Management, **Manage Knowledge Search Dictionary**.
5. Select Content Processing, and run **Queue all Authoring Articles** to add all articles to the queue to be re-indexed in the next content processing run.
6. If Content Processing is not scheduled, then manually start Run Incremental Content Processing.

Enable Agents to Send Article Links to Chat Users

You can enable agents to send article links directly to chat users when they are working in an SR and chatting in Live Window.

When agents send a link from the SR using the send link icon, the link information displays in the chat window, and customers can paste the link into a browser address field to open the article in the Digital Customer Service application.

You must have DCS implemented to enable sending links to chat users. To enable sending article links to chat users, set up Knowledge in Digital Customer Service by following the steps in "Enable Deep Links to KM Articles in Outbound Emails to Open in DCS" in the Oracle Fusion Service Implementing Service Center with the Classic User Experience guide.

3 Manage Knowledge Users

Manage Knowledge Users

You manage knowledge users by making knowledge capabilities available to the people who contribute to the knowledge base, and to the people who use knowledge to resolve service requests or answer questions for themselves.

These topics and examples explain and demonstrate how to work with roles, privileges, policies, and knowledge user groups to set up and maintain users for your application.

Oracle's role-based security features enable knowledge administrators to control which knowledge functions or tasks users can perform, and which knowledge content they can interact with. Knowledge also has user groups to segment knowledge base content for specific groups of users. User groups work with the role-based security model to provide additional control over access to published knowledge.

It's important to understand the types of users you will need to create and manage for your application and also to understand some of the basic requirements for those users. You will also need to know something about how roles, privileges and policies work together so that you can adapt the predefined knowledge roles to meet your organization's specific requirements.

Types of Knowledge Users

The two main types of users to keep in mind when you set up your application are authoring users and access users. These types of users correspond to the main functional areas of the knowledge application, knowledge authoring and knowledge access.

- Authoring users include authors, knowledge managers, and other contributors or reviewers. They create, update, and manage the articles and external document collections that make up the knowledge base.
- Access users include service representatives who use knowledge to resolve service or help desk requests, and self-service users who use My Knowledge and other applications that are configured to deliver knowledge.

The processes for setting up and managing these different types of users are similar, but there are some important differences.

Valid Knowledge Users

You may have users in your application who are not properly defined to be knowledge users. You can make knowledge available to any Service or HCM users that meet these requirements.

- In Service applications, knowledge users must be a resource. Resources can be created in the Manage Users work area. Users created directly in the Security Console will not automatically be created as resources, and will be unable to use knowledge.
- In HCM applications, you must identify employees as resources using the Identify Resources task. Users must be created using the Hire an Employee task or a similarly configured bulk user creation process. You can't use

the Create User process to create HCM knowledge users. This process does not create users who can access a wide range of HCM capabilities, including knowledge.

Related Topics

- Securing Sales and Fusion Service
- Securing HCM

Types of Knowledge Applications

You can set up users to use Knowledge in Service Center, Help Desk, Fusion Service, and HCM HR Help Desk applications.

In some cases, you may have users who contribute or use knowledge in more than one application. It's important to keep the application in mind as you set up users, because users must have privileges in at least one application. Additionally, most of the predefined knowledge roles support only one application.

Note: Applications are also called departments in the user roles pages and in some other contexts.

Knowledge Users and Roles

You may already be familiar with Oracle Cloud Applications user roles to define users' capabilities. In this model, users have one or more roles, and those roles grant access privileges to protected resources.

Each role contains functional and data security policies that define the privileges that they grant. In order for a role to grant a particular privilege, it must contain policies that specify both the functions (tasks) and the data (objects) that the privilege grants access to. Roles can grant multiple privileges, and users can have more than one role.

- Functional security policies govern the tasks that users can perform. Important tasks for authors and knowledge managers include viewing, creating, publishing, and deleting articles. For access users, the ability to view knowledge articles is the most important task.
- Data security policies govern the data, or objects that users can access, and importantly, perform tasks on. Important knowledge management data include the content types that you grant users access to, and knowledge user groups.

Knowledge management has user groups that you use to control who can see which articles and documents in your knowledge base. Users who are assigned to a user group can access the content in it. There are predefined user groups to help you segregate content that should only be viewed by users within your organization, and you can define and implement your own user groups to segment content for additional audiences.

User groups are associated to data security policies. You grant users access to your user groups by assigning them roles that contain the data security policies for those groups, whether pre-defined or specific to your organization.

You can find detailed information on how roles, privileges, and policies work together in the Sales Users and Role Provisioning chapter of Securing Sales and Fusion Service.

Knowledge Authoring Requirement

When you set up authoring users, you need to assign both functional security policies and data security policies. In addition, you need to make sure that the authors are assigned to an authoring locale. This list summarizes the user requirements for authors:

- The Knowledge Authoring functional security policy, which provides access to knowledge authoring capabilities.
- The Grant on Knowledge Departments data security policy, which provides access to knowledge base content in one or more applications (departments). Authors usually work in only one application, either Service or HCM.
- One or more content type data security policies (for example, Grant on SVC Content Types), which provide access to the types of articles that the author needs to create. Content types are specific to applications (departments). Make sure that the content types and department security policies are consistent within a role.
- One or more Authoring locales, which determine the locales that the user can create content in.

Related Topics

- How do I assign locales to authors?
- Securing Sales and Fusion Service
- Securing HCM

What are the predefined knowledge roles?

There are predefined knowledge roles to help you set up and manage users.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

Most organizations use the predefined roles as the basis for defining new roles to meet their specific needs. You can copy, edit, and save your own roles to assign to users so that they have the right privileges and policies for your organization. You can also create entirely new roles if there are no suitable predefined roles to copy and edit.

Fusion Service Knowledge Access Roles

Use these predefined roles as starting points to set up users to access knowledge in a Fusion Service application:

- Agents who use knowledge to help resolve customer issues.
- Managers who supervise agents and manage knowledge activities.
- Internal users who use My Knowledge
- External web users who use public knowledge in Digital Customer Service and in user-defined pages and portals.

Role	Access Locations	User Groups	Application Content
Customer Service Representative	• My Knowledge	• Internal Service	Fusion Service

Role	Access Locations	User Groups	Application Content
	• Knowledge in SRs	• Everyone	
Customer Service Manager	• My Knowledge • Knowledge in SRs	• Internal Service • Everyone	Fusion Service
Customer Self Service User	• Public web channels	• Everyone	Fusion Service

Fusion Service Knowledge Authoring Role

Use this predefined role as a starting point to set up knowledge authors who contribute content to a Fusion Service knowledge base.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Author - Service	Authoring	• Internal Service • Everyone	Fusion Service

HCM Knowledge Access Roles

Use these predefined roles as starting points to set up knowledge users in an HCM HR Help Desk application.

- Managers who manage knowledge activities.
- Internal users who use My Knowledge

Role	Access Locations	User Groups	Application Content
Human Resource Help Desk Manager	• Authoring • My Knowledge • Knowledge in HCM service requests	• Everyone • Employee • Internal HCM	HCM
Knowledge Search - HCM	• My Knowledge	• Internal HCM	HCM

HCM HR Help Desk Knowledge Authoring Role

Use this predefined role as a starting point to set up knowledge authors who will contribute content to an HCM knowledge base.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Author - HCM	Authoring	• Everyone • Employee • Internal HCM	HCM
Human Resource Help Desk Manager	• Authoring • My Knowledge • Knowledge in HCM service requests	• Everyone • Employee • Internal HCM	HCM

General Knowledge Role

Use this predefined role as a starting point to set up knowledge managers who administer the knowledge base and knowledge analytics for Fusion Service and HCM knowledge applications.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Manager	• My Knowledge • Authoring • Knowledge analytics • Knowledge setup and maintenance tasks • User management • Public and internal articles	• Internal Service • Internal HCM • Employee • Everyone	HCM and Fusion Service

Note: There is also a Knowledge Analyst role that should not be used in new implementations. It is maintained for compatibility reasons only.

Create a New Authoring Role by Editing a Predefined Role

Here's an example of how to create a new role for your application by copying and editing an existing role. Let's say that you have agents in your organization who also need to create and update FAQ articles.

You can create a new authoring role for these agents by copying and editing the predefined customer service representative role, and adding authoring capabilities and access to FAQ articles to it.

Before you start, you will need to know the reference key of the FAQ content type so that you can assign the Data Security Policy Data Set later. You can get the reference key by going to Setup and Maintenance, Service, Knowledge Management, Manage Knowledge Content Types.

Here's how you can create a new role based on a predefined role, then modify it.

- Create the new authoring role by copying the customer service representative role.
- Add authoring capabilities by adding an authoring job role to the new role.
- Give the new role access to FAQ articles by adding a data security policy.
- Assign the new role to the agents who need to create and update FAQs.

> **Note:** The role we will copy has access to the Service application (department), so we don't need to grant additional department access.

Copy and Rename the Customer Service Representative Role

Create the new authoring role by copying and renaming the Customer Service Representative role.

1. Go to Tools, Security Console, Roles page and locate and select the **Customer Service Representative** role.
2. From the drop-down list, choose Copy Role, Copy Top Role.
3. On the Basic Information page, name the new role **CSO_Author**, and give it the code **CSO_Author_JOB**.
4. Click **Next**.

Add Authoring Capability and Access to Content

Assign functional privileges to the role to provide access to authoring functionality. When you copy a role, you can click Load Inherited Policies to display policies that copied from the original role. You can delete any inherited policy that you don't want to include for this role.

1. Click **Add Function Security Policy** and search for Knowledge in the functional security policies.
2. Select and add the **Knowledge Authoring** privilege.
3. Click **Next** to go to the Data Security Policies page.

Add a Data Security Policy

Add a data security policy that grants access to the FAQ content type and the actions that you want to enable.

1. On the Data Security Policies page, click **Create Data Security Policy** .
2. Enter a Data Security Policy name and a description
3. Under **Database Resource**, search on **Knowledge** and select **Knowledge Content Types**.
4. Leave **Data Set** as **Select by Key** and enter the Reference Key for the content type this policy grants access to.
5. From the **Actions** menu, select Update and View for this role. Authors must be able to view and update articles, but you may also want to enable them to clear checkout, delete, translate and publish articles, or you may want to reserve those activities for a different role.
6. Click **Users** to assign users to this role.

Assign Users to the Role

Finish by assigning the new CSO_Author role to users either individually, or by adding the new role to all users who currently have the Customer Service Representative role. See Securing Sales and Fusion Service for additional methods of assigning users to roles.

> **Note:** You must also assign knowledge authors to one or more locales. Authors' locale assignments determine which languages they can create and update articles in.

1. Click **Add User** on the Create Role: Users page.
2. In the **Add User** dialog box, select a user.
    - Select a single user to add only that user to the role, then click **Add User to Role** to add the user.
    - Select a role to add all of users assigned to it, then click **Add Selected Users** to add them.
3. Click **Submit**.

The Create Role: Users page shows the updated role membership.

Related Topics

- How do I assign locales to authors?

Change Users' Knowledge Roles

You can change or remove users' knowledge capabilities by changing their role assignments or by modifying the roles that they currently have assigned to them. Remember, if you modify a role, your change will affect every user who has that role.

You can modify user-defined roles only. Predefined roles cannot be modified. You edit a role by selecting it on the Roles tab of the Security Console and clicking Edit Role. You can't change the role code.

Predefined User Groups

There are predefined user groups for internal users of each application, and one special group that includes all users regardless of application.

You can use the predefined knowledge groups to separate content that only internal users can access from content that everyone can access.

- Internal Service - assign this group to content in a Service application that you want only customer service representatives and other users in your organization to access.
- Internal HCM user group - assign this group to content in an HCM application that you want only help desk agents and other users in your organization to access.
- Employee - assign this group to content in an HCM application that you want authenticated self-service users in your organization to access.
- Everyone - assign this group to content in any application that should be available to anyone, including unauthenticated users. This group is not associated to an application.

How do I implement user groups?

You can use both predefined user groups and user groups that you create. In either case, you need to do a few things to make them work properly in your application.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

In security model terms, a user group is like a privilege, which you define in a data security policy within a role. You add users to user groups by assigning them to roles that contain user group data security policies. We recommend that you create new roles when you set up user groups.

User groups are also specific to a department, or application. When you create a role to grant access to a user group, make sure that it also grants access to the department, or application, that the group belongs to.

Here are the basic tasks to set up a user group:

- Create a new role. You can create a new role or copy an existing role and modify it to your needs.
- Add a department data security policy. You can add one or more department DSPs based on your access requirements.
- Add a user group data security policy. You can add one or more user group DSPs based on your access requirements.
- Assign the role to users. You can assign the role to individual employees or groups of employees and set up autoprovisioning to automatically assign the role to new employees, as necessary.

> **Note:** When creating an article, the author must add at least one user group to the article. If you use a REST API to create or update an article without a user group, the application automatically assigns the Everyone user group. If you add the Everyone user group to an article, you cannot add any other group.

For more information on creating user groups, see *How do I create a user group?*

Example: Set Up the Employee User Group

Add HR Help Desk users to the pre-defined Employee user group by assigning them to a duty role that contains the user group data security policy. The Employee user group is for authenticated HCM HR Help Desk self-service users in your organization.

It's likely that your organization has knowledge base content that is suitable only for your employees. In HR Help Desk applications, the predefined Employee user group helps you limit access to this type of content to authenticated self-service users in your organization.

You need to set up both users and content to use the Employee user group.

- Set up your users by assigning them a role that grants access to the HCM HR Help Desk application (department), and grants access to content in the Employee user group.
- Set up your content by assigning the Employee user group to the articles that only employees should access.

Note: If you assign content to the Employee user group without assigning users to a role that grants access to the both the HR Help Desk application and the Employee user group, then none of your users will be able to access content in that group.

In this example, we'll set up users to access employee-only content in an HCM HR Help Desk application.

Create a New Role for Employees

We'll start with the predefined Employee role, and follow best practice to create a new HCM Employee role by copying and renaming it.

1. Go to the Tools, Security Console, Roles page.
2. Search for the predefined Employee role (ORA_PER_EMPLOYEE_ABSTRACT).
3. Copy the predefined Employee role.
4. Name the new role HCM Employee.

Add Data Security Policies to Grant Access

HCM Employee users need to access the HCM HR Help Desk application and the content in the Employee user group. To set up access, we'll add HR Help Desk application and Employee user group data security policies to the new role.

First, we'll add access to the HCM application (department).

1. Go to the Data Security Policies page in the HCM Employee role.
2. Click **Create Data Security Policy**.
3. Enter the name **HCM Department** and a description.
4. Search on **knowledge** and select **Knowledge Departments** as the Database Resource.
5. Select **Select by instance set** as the Data Set.
6. Select **Access to HCM Department** as the Condition Name.
7. Select **Access Content with Department** in the Actions field.

Next, we'll add access to the Employee user group.

1. Click **Create Data Security Policy**, again.
2. Enter the name **Employee User Group** and a description.
3. Search on **knowledge** and select **Knowledge User Groups** as the Database Resource.
4. Select **Select by instance set** as the Data Set.
5. Select **Access to employee user group** as the Condition Name.
6. Select **Access Content with User Group** in the Actions field.

Assign Users to the HCM Employee Role

Now we can assign the HCM Employee role to the users who need to access employee-only knowledge content.

1. On the Update Role: Users page, click **Add User**.
2. In the Add User dialog box, search for and select a user or role.
   - Select a single user to add only that user to the role, then click **Add User to Role** to add the user.
   - Select a role to add all of users assigned to it, then click **Add Selected Users** to add them.
3. Click **Submit**.

See Securing Sales and Fusion Service for additional methods of assigning users to roles, such as performing mass updates and setting up auto-provisioning for roles.

Related Topics

- How do I add articles as favorite?

How do I create a user group?

You can create, update, and delete user groups to control access to published knowledge articles.

> **Note:** This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

You must have the knowledge manager role, or a similar role that includes the Knowledge Setup and Maintenance privilege to create user groups.

1. Go to Setup and Maintenance.
2. Select the **Service** offering and select **Knowledge Management**.
3. Select the **Manage Knowledge User Groups** task.
4. Select **Service** from the **Department** menu and click **+** to add a new user group.
5. Enter a unique name and reference key for the user group.
6. Click **Create**.

> **Note:** To grant a user access to any content that is assigned to a user group other than EVERYONE, you must assign the user a role that:
>
> - grants access to the intended department
> - grants access, with a Data Security Policy, to one or more user groups

Define a User Group Data Security Policy in a Role

You must have privileges to access the Security Console to perform these tasks.

You can edit a role to add a data security policy for the user group you have created.

1. Go to **Tools** > **Security Console** > **Roles** page and locate and open the role that you want to add the user group data security policy to.
2. Copy the role and go to the Data Security Policies page.
3. On the Data Security Policies page, click **Create Data Security Policy** and change the start date if you need to.
4. Enter a policy name.
5. Search for and select the database resource for which you're defining the policy, for example, search for Knowledge User Groups.
6. For Data Set, select **Select by key**.
7. Enter the user group reference key in the **Select a primary key value** field.
8. In the **Actions** field, select **Access content with User Group**.

You can view the new policy on the Data Security Policies page by scrolling to the end of the list of policies. You can accept the default role hierarchy and click **Next** to continue. The user group data security policy will apply to users who have the role that you updated.

Assign the Updated Role to Additional Users

You can add users to the role that has the new user group data security policy as needed. See the *Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service* guide for additional ways of assigning users to roles.

1. On the Update Role: Users page, click **Add User** .
2. In the **Add User** dialog box, search for and select a user or role.
    - Select a single user to add only that user to the role, then click **Add User to Role** to add the user.
    - Select a role to add all of users assigned to it, then click **Add Selected Users** to add them.
3. Click **Submit**.

The Create Role: Users page shows the updated role membership.

4 Configure End-User Access to Knowledge

Configure Knowledge

Configuring knowledge to suit your requirements involves these tasks:

- Adding the knowledge component to HCM application pages.
- Adding and configuring the knowledge component.
- Configuring my knowledge page.
- Choosing the default tab and configuring search terms.
- Restrict knowledge by product, category, or content type.

When you enable My Knowledge, users can search for knowledge articles and access and update their favorites. When you implement Knowledge on HCM application pages, users can see recommended articles based on search terms that you configure, access and update their favorite articles, and search for knowledge articles.

Note: The user interface limits Knowledge search results in My Knowledge and the Knowledge widget to 30 articles.

Configure My Knowledge Page

You can configure My Knowledge pages by adding tabs that show Recently Updated and Favorite articles. You must configure My Knowledge in Service, Help Desk, and Knowledge independently of one another.

You configure My Knowledge using Application Composer to activate a sandbox, configure the page, and publish the sandbox. You may need to create a sandbox as part of this procedure. You must have a role that includes the FND_VIEW_ADMIN_LINK_PRIV privilege to configure the My Knowledge page, for example, the knowledge manager role. You must be an application administrator with the FND_ADMINISTER_SANDBOX_PRIV privilege to publish a sandbox.

Site-Level and Role-Level Configuration

You can configure the My Knowledge page at the site level and role level. Role-level configuration overrides site-level configuration. If you configure at the application level, all users see the changed content. If you configure at the role level, only users with that role see the changed content.

This table illustrates the roles and the levels at which the configurations are visible.

User with Roles	Configuration Visibility
customer service representative	• Visible at site level and customer service representative level • Not visible at knowledge analyst level
knowledge analyst and knowledge manager	• Visible at site level and knowledge analyst level

User with Roles	Configuration Visibility
	• Not visible at customer service representative level
customer service representative, customer service manager, knowledge analyst, and knowledge manager	Visible at all levels

Access or Create an Active Sandbox

You must access a sandbox to configure the My Knowledge page. You can access a currently active sandbox, activate an existing sandbox, or create and activate a new sandbox.

To activate a sandbox, open the navigator and select Sandboxes. If no sandbox is active, select Enter Sandbox against the sandbox you want to activate.

If no sandbox exists, create a sandbox and activate it.

1. Select Create Sandbox.
2. In the Create Sandbox dialog box, enter a name, description, and specify if the sandbox is publishable.
3. Select the tools you want for the sandbox. While the context for all tools is site, you can edit that of the page composer by clicking the edit icon. In the **Edit Sandbox Context** dialog select a category and then select the appropriate context, and click OK.
4. Select **Create and Enter** to create and activate the sandbox.

Add Content to the Page

Add tabs to the My Knowledge home page.

1. Open the Settings and Actions menu and select **Edit Pages**.
2. Select the Site layer and click **OK**.
3. Click **Add Content** to view the Add Content dialog.
4. Click **Open** if you want to add components such as an image, moveable box, and so on to the page.
5. Click + to add favorite articles, knowledge search results, or recently updated articles to the page.

Publish the Sandbox

Publish the updated sandbox.

1. Open the Settings and Actions menu and select **Manage Sandboxes**.
2. Select the sandbox you created and click **Publish**.

Add Knowledge to HCM Application Pages

You can enable users to access knowledge directly from HCM application pages by adding the Knowledge Search component. Adding knowledge to HCM pages enables users to be more productive by helping them get answers to questions without leaving the task or page that they are using.

For example, you can add knowledge to transaction pages, such as Transfer, or to help pages. Users will see knowledge content relevant to them and the page that they are using, and they can review recommended and favorite articles, or search for additional information.

The Knowledge Search component is available as a shared resource in the common Resource Catalog. Knowledge search and article viewing functionality is available for pages that support application composer. To add the Knowledge component, you will need to activate a sandbox for your application, use page composer to add and configure the component, then publish the updated page.

If you are using the default responsive user experience in your HCM application, you can enable responsive knowledge pages by following the process described in Enable Responsive Knowledge in HCM Application Pages in Implementing Knowledge Advanced. When it's enabled, knowledge pages display in either mobile or desktop mode, depending on the user's device. Users access responsive knowledge using a card that you add to the page. If you are using the non-responsive HCM user experience, you can still use the process in this section to implement knowledge, but responsive knowledge will not be available.

Related Topics

- Enable Responsive Knowledge in HCM Application Pages

Guidelines to Add the Knowledge Search Component

Follow these guidelines when you add Knowledge to an HCM page:

- Verify that you have these privileges:
  - Sandbox Management (FND_VIEW_ADMIN_LINK_PRIV)
  - Sandbox publishing (FND_ADMINISTER_SANDBOX_PRIV)
  - Page Editing (FND_VIEW_ADMIN_LINK_PRIV)
  - View Knowledge widget (PER_ACCESS_KM_FROM_HCM)
- Understand the typical workflows for working with runtime application changes.
- Verify that the page can be modified by checking that either the general Edit Pages menu item or the Edit Pages item for the specific page is available in the Settings and Actions menu.

Add the Knowledge Search Component

You can add knowledge to a page by activating a sandbox and using page composer.

1. Open the page you want to edit, and click Edit Pages in the Settings and Actions menu.
2. Follow the appropriate Edit Pages visibility instructions, then click OK. The page will display one or more Add Content buttons, or a ribbon with Add Content, Select, and Structure tabs.
3. Click the Add Content button, or click the Structure tab and the location where you want to add the Knowledge widget.
4. Click Edit, then click the + icon.
5. Click Application Content, then click the + link for the Knowledge component.

Configure the Knowledge Search Component

You configure the knowledge to display the desired content to users by setting certain parameters.

Set the following parameters:

- The tab that will display to users by default when the open the page.
- The default search parameters to populate the list of knowledge articles.
- The default knowledge locale.

If User Friendly Parameter Setup is enabled, you can use the menu options to select the default tab, and the dialog to configure the search locales. If User Friendly Parameter Setup is not enabled, you must manually enter the data for the knowledge parameters.

1. Hover over the component to display the Edit icon. If the ribbon displays, you may need to switch to the Add Content tab to display the Edit icon.
2. Select the Parameters tab in Component Properties.

Choose the Default Knowledge Tab

You can choose which knowledge tab will be open when users view the page you are adding knowledge to. Choose one of these tabs:

- Recommended Articles displays a list of search results based on the default search terms that you configure.
- Search displays a field for users to conduct their own knowledge search.
- Favorites displays the user's list of favorite articles.

If User Friendly Parameter Setup is enabled, you can select the tab to display on the page by default from the Default tab. If User Friendly Parameter Setup is not enabled, manually enter one of these identifiers to specify the desired tab:

- SEARCH
- RECOMMEND
- FAVORITES

Configure the Default Search Terms

The Recommended Articles tab displays a list of articles based on the default search terms that you configure.

If User-Friendly Parameter Setup is enabled, you can use the menu and dialog to configure the search terms. If User Friendly Parameter Setup is not enabled, you must manually enter the locale and search terms in this format:

```
{"language_code-location_code":"search_term","language_code-location_code":"search_term",...} Specify
 one entry for each active knowledge locale in your application. For example, if your application
 supports knowledge in English for the United States of America, French for users in France, and Spanish
```

```
for users in Spain, and you want to display articles about vacation policy, enter the following:
{"en_US":"vacation","fr_FR":"vacances","sp_SP":"vacaciones ",}
```

1. Click the magnifying glass icon for the Search Locales Map to display the list of supported locales (language and territories).
2. If User Friendly Parameter Setup is enabled, enter a search term for each active locale (language and territory) for the application. If User Friendly Parameter Setup is not enabled, manually enter the search term and locale data.

You can now publish the sandbox to make the edited page available to users.

Related Topics

- Default Preferred Knowledge Locale

Restrict Knowledge by Product, Category, or Content Type

You can configure the Knowledge Search Component to filter answers by product, category, and content type. Setting filters for specific products, categories, and content types enables you to show only the most relevant knowledge when users visit the page.

You can configure knowledge to display content about one product, category, and article content type (Solution, FAQ, and so on). You can select only the products, categories, and content types that are assigned to the application that the widget is configured for. The contexts that you set apply to search results, and recommended articles, but not to favorites. They also apply to the details page when users open an article from the knowledge component.

You can assign only one of each product, category, and content type. When you assign a combination of a product, a category, and a content type, all restrictions will apply. For example, if you assign the myProduct product, the Installation category, and the FAQ content type, search and recommended articles will show only FAQ articles about installing myProduct. You can also hide one or more of the tabs if they are irrelevant to the purpose of the page.

1. Open the knowledge search component in page composer.
2. Click +Add.
3. Choose up to one product, one category, and one content type from the selector.

5 Create and Manage Content Collections

Overview of Content Collections

Collections are groups of documents that you create to quickly and easily include in the knowledge base and make available to agents and self-service users.

Thus authors are not required to create additional articles. Collections can be documents from web sites or document repositories, such as directories of PDF files.

The Knowledge content processor accesses the documents directly from the web or file server where they reside. You do not need to move or copy the documents to include information from your organization's web sites or other repositories in your knowledge base. You can create as many collections as you need.

Before You Begin

Creating a collection takes a little planning and preparation. You need to know which documents to include, how to tell the application to access the documents so that they can be indexed, and who the audience is for the collection.

The content processor works by first crawling the web or file server, so you will need a site map file to tell the application where the documents are. If the documents are secured, you will also need to include authentication information. And you might also need information to supply form data, cookies, or proxy server information.

Note: You can't use a javascript password to authenticate the content processor.

Create a Collection

You create a collection in the Collection Management tab under Manage Search Dictionary in Setup and Maintenance.

1. Click Service in the Setup menu.
2. Click Knowledge Management in the Functional Areas menu.
3. Click Manage Search Dictionary, then open the Collection Management tab.
4. Click the plus sign (+).

Define a Collection

You define a collection by naming it and giving it a label that users will see. You also specify whether you want the content processor to automatically detect the language of each document, or assign a locale to all of the documents.

Name the Collection

A collection has both a name and a display label. The name is for administrative use, and is not visible to users. Once you save a collection, you cannot change its name. You can use spaces and any of these characters in a collection name:

1. Upper and lowercase alphabetic characters
2. Numerals (0-9)
3. ( )
4. -
5. _
6. { }
7. "
8. .

The display label is the name that users will see. You can change the display label if needed. The display label can be in any language, and can have any characters.

Choose a Language Assignment Method

You can choose to have the content processor automatically detect the language of each document in a collection, or assign a specific locale that will apply to all documents.

A locale represents a language and a specific region in which a variant of that language is used. Locales help you to differentiate knowledge content by language and country or region. Important locale-specific differences include regulations, procedures, addresses, currencies, date formats, and country- or region-specific terms.

- Choose automatic language detection for most collections, whether they contain a single language or multiple languages. Automatic language detection assigns a base language to each document in the collection, so that the documents are available in all locales based on that language. For example, a document assigned to English will be available in the en-AU, en-CA, en-IE, en-NZ, en-GB, and en-US locales.
- Choose a specific locale only when you need to override automatic language detection. For example, you may have documents intended for a French-speaking audience, but which use English titles, causing them to be processed as English.

> **Note:** Assigning a specific locale will make the collection available only to users who have set that preferred locale, or who explicitly select that locale when searching.

Describe a Collection

You describe a collection by providing a site map to direct the content processor to the documents you want to include in the collection. You also specify whether the content processor will follow or ignore any robots.txt or robots meta tags that it finds.

Provide a Site Map

You must use a site map file and a site map URL to direct the content processor to the documents that you want to include in the collection. Site maps are structured indexes created specifically for use by search engines. They list the

URLs of the documents in your site and include important metadata about each document, such as when it was last updated, and how frequently it changes.

You can specify only one site map URL for a collection. However, you can use child site map .xml files within the primary site map file. You can use an existing site map or create new site maps using many available tools. You can also manually create site map files.

Some important points to consider in creating the site map file.

- Here is a list of extensions (in regex format) that are NOT supported by KM crawler:`\.jpg$$|%\.gif$$|%\.jpeg$$|%\.js$$|%\.png$$|%\.zip$$|%\.exe$$|%\.[tjr]ar$$|%\. tgz$$|%\.css$$|%\.tar\.gz$$|%\.mp[g3e4a]$$|%\.avi$$|%\.rm$$|%\.ram$$|%\.as[fx] $$|%\.wm[vazsf]$$|%\.au$$|%\.msi$$|%\.sit$$|%\.m4a$$|%\.mov$$|%\.cab$ .`
- If the sitemap URL is defined as: `"https://<hostname.domain>/xx/xx/xxxx/sitemap.xml"`, and the documents within the sitemap have a different domain they will be rejected. To override this so that URLs with the a different domain are allowed you need to define this in the 'Include Pattern' .

Use or Ignore Robot Files and Tags

Robot text files and robots tags specify which documents and links on a site are available to the content processor. Click Yes to use them, or No to ignore them.

Exclude or Include Specific Documents

You can exclude or include specific documents by entering one or more regular expression patterns. Enter each pattern in a separate field. The content processor accepts all documents by default, so in most cases you don't need to specify explicit document acceptance patterns.

Set Up Access to a Collection

You set up access to a collection by choosing the department that it belongs to, which groups of users will be able to see its documents.

You must also enter information that the content processor needs to authenticate and access the content, including user name, password, form data, proxy servers, and cookies.

Choose a Department

You must assign a department to the collection. Choose the department, either Service or HCM, that corresponds to the application that the collection is for.

Choose Users

You can choose whether all users, or only selected user groups can see the documents in a collection. By default, all users can see collections.

- Click Yes in the **Can everyone see this collection?** field if all users should see documents in this collection in their search results.

- Click No to restrict this collection to selected user groups. If you chose to restrict the collection, select the user groups that you want to be able to access the collection in the Selected User Groups column.

Authenticate the Content Processor

You may need to authenticate content processing so that it can access the documents in the collection. The default is no authentication.

1. Click Yes in the Do you need authentication to access these documents? field if content processing needs to be authorized, then specify the authentication method. Click No if the content acquisition process does not require any authorization.
2. If content processing needs to be authorized, select one of the following methods for authenticating the content acquisition process:
   - Select BASIC to use plain text user name and password information. You can also specify an optional `Kerberos` realm, which may be required for environments that are configured to trust non-Windows `Kerberos` realms.
   - Select NTLM to use Windows NT LAN Management protocol for access to servers using Integrated Windows Authentication for HTTP authentication. You must specify the domain in which the user name and password are valid, and you can also specify an optional `Kerberos` realm, which may be required for environments that are configured to trust non-Windows `Kerberos` realms.
   - Select NONE if no user name and password are required, and you need to specify only required additional authentication information, such as form data, proxy server information, and cookie values.
3. Specify the user name and password.

   > **Note:** You can't use a javascript password to authenticate the content processor.

4. Specify an optional `Kerberos` realm, which may be required for environments that are configured to trust non-Windows `Kerberos` realms.
5. In NTLM environments only, specify the domain that the user and password are valid within.

Enter Form Data

You may need to enter data that content acquisition can use to complete any HTML-based forms that a web site requires to access content. You can enter one or more sets of form data, and you can enter multiple field name-value pairs for each form action.

1. Enter a form action, which is the URL at which the content acquisition process enters the associated field name-value pairs.
2. Enter the field name for the action in plain text.
3. Enter the value for the specified field name in plain text.

Enter Proxy Server Information

You may need to enter proxy server information so that content acquisition can use an HTTP proxy server to access the content. You specify proxy server information as a set of header data and one or more key-value pairs that the content acquisition process adds to the header information to access the proxy server.

1. Enter HTTP header information.
2. Enter the header key.
3. Enter the header value.

Enter Cookie Data

You may need to enter cookie data to enable the content acquisition process to maintain a desired state or session so that it can access content on the site. You enter cookie data as a set of one or more name-value pairs in plain text.

1. Enter the cookie name.
2. Enter the cookie value.

Complete a Collection

You complete a collection by activating it so that its documents are processed, indexed, and available in the knowledge base. You can also save the collection definition and make it active later.

Enable a Collection

You must select one of the following options to set the enablement status of the collection:

- Enable this collection to go live, so that its contents are added to the search index, and are available to end users.
- Keep the collection definition, but do not index for searching. The content in the collection is not available to users. Use this option to disable a collection.

If you re-enable a previously disabled collection, content processing and indexing begins with the next scheduled content processing for the type of collection.

Search Can Assign Titles to PDFs

In many cases, some or all of the articles in your collections are PDFs.

Most PDFs have a visual title, which is a string of text on the first page that most readers would recognize as the title, for example Mobile Phone User Manual or How to Read a Stock Report. However, not every visual title is that easy to spot. There may be many lines of text on the first page, or maybe no text at all. So how does Search determine the visual title to match to a search request?

Search uses the automatic PDF title discovery feature to determine PDF titles. It finds the visual title of a PDF automatically and uses it for title matching and as the search result title. A key advantage to the title discovery feature is you don't have to do any additional authoring to provide the best search result title.

The title discovery evaluates the PDF for visual factors, such as:

- The size of the font. Usually the larger text on a first page denotes a title.
- The position of the text, for example, the first few sentences of the PDF.
- The phrase length and distance between lines of the text.

For example, a string of text appears on a first page of a PDF as:

Oracle [Font Size 30, Bold, Red]

User Guide [Font Size 24, Bold]

Knowledge Management [Font Size 20]

Version 1.1 [Font Size 18]

This user guide describes how to use Knowledge applications [Font Size 11]

Most users wouldn't read this string of text as:

- Oracle, or
- Version 1.1, or
- This user guide describes how to use Knowledge applications.

But they would read this text as:

- Oracle User Guide or User Guide
- Oracle User Guide Knowledge Management or User Guide Knowledge Management
- Oracle User Guide Knowledge Management Version 1.1 or User Guide Knowledge Management Version 1.1

So, in this example the PDF title discovery automatically determines the best titles for search accuracy as **Oracle User Guide Knowledge Management Version 1.1**, or **User Guide Knowledge Management Version 1.1**.

If the PDF has no string of text on the first page, making it impossible to find a visual title to assign, it selects one of the following as a search result title:

- The title in the PDF's properties, if a properties title is defined.
- The PDF's file name.

> **Note:** The visual title that Search assigns to a PDF appears as a search result title only after the full content processing cycle is complete.

How to Disable the Automatic PDF Title Discovery

The PDF title discovery feature is enabled when you open the application, but you can disable it. However, be aware that disabling this option may severely compromise search accuracy. If you do disable it, you will see the following warning message:

Enable the automatic title discovery for PDFs. Test thoroughly as this changes impact search accuracy. Search will reflect the change after content processing completes.

When this configuration option is off, the application assigns a search result title for a PDFs as if there is no visual title available. The change of this option takes effect after the next content processing cycle completes. To disable the automatic PDF title discovery:

1. Log in and click **Setup and Maintenance**.
2. At the Setup menu, scroll down and select **Service**.
3. At Functional Areas, select **Knowledge Management**.
4. At Knowledge Management, click **Manage Knowledge Search Profile Options**.
5. At the Manage Knowledge Search Profile Options page, click **CSO_AUTO_PDF_TITLE_DISCOVERY**.
6. At the Site menu, select **No**.

6 Manage the Search Dictionary

Manage the Search Dictionary

You can use the Manage Search Dictionary tool to view, edit, and add concepts and synonyms to the dictionary.

You can add terms that are important to your organization and your users, including specific products and services, as well as the synonyms (acronyms, abbreviations, alternative names, and legacy names) that agents, customers, and authors might use when searching for answers to questions.

The dictionary enables search users to quickly and easily find answers in the knowledge base without knowing specific terminology or how the content is worded or organized. Search automatically matches users' questions to the best answer.

Concepts and Synonyms

A concept is an important term used in your organization or by your users. Concepts include products, services, and other terms that have specific meaning in your industry.

Concepts have synonyms, which are words that have similar meanings, and also abbreviations, acronyms, legacy names, or other alternative names that people might use when seeking answers to questions. For example, the concept plan in your industry and organization might include the synonyms agreement and proposal. The dictionary treats concepts and their synonyms as a single object.

When you implement Knowledge, the dictionary already includes many common and industry-specific concepts and their synonyms. In addition, it automatically creates concepts for the products defined in your product hierarchy.

You can update the dictionary by adding new concepts and synonyms, and by modifying existing concepts and synonyms to ensure that search is matching your users' questions to the best answers in the knowledge base. For example, adding synonyms to automatically created product names can help answer users' questions about those products when they use abbreviations, acronyms, or other alternative terms. Knowledge analytics can also help you identify possible dictionary updates to improve search accuracy.

List Concepts

You can list the automatically created product concepts and any concepts that you have updated or added to the dictionary.

To list these concepts, do the following:

1. Sign in to the application, and from the navigator, click **Setup and Maintenance**.
2. From the **Setup** drop-down list, select the **Service** offering.
3. Select **Knowledge Management** from the functional areas, and then select the **Knowledge Management Search Dictionary** task.

The Manage Search Dictionary page displays the product concepts and concepts that your organization has created or modified.

> **Note:** The dictionary is organized by language, not by locale. All locales based on the same language use the same set of dictionary concepts and synonyms.

Find Concepts

You can use the Find feature to locate concepts.

To locate concepts, do the following:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. In the Manage Synonyms pane, enter a concept, or a partial concept name, in the **Find** text field.
3. Click the search icon.

   The search results display concepts that match your search criteria in all your active languages. The search results include enabled and disabled concepts.

How do I add concepts and synonyms?

You can add concepts to the search dictionary. You can also add, update, and delete synonyms for existing concepts.

> **Note:** This answer is applicable to Fusion Service Knowledge Management with the Classic User Experience.

To add concepts and synonyms:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. Click the + symbol in the **Manage Search Dictionary** page.
3. Complete the fields **Concept Name** and **Description**.

   > **Note:** You need to add the concept name as a synonym. For example, if you created a concept named "mobile", you also need to add a synonym named "mobile".

4. To add a synonym, click the + symbol in the **Concept Details** window.
5. Enter the **Synonym** name and select the **Language** from the drop-down list and save it.

   > **Note:** You can add synonyms only for your active languages.

Update Concepts

You can update concepts and synonyms, and enable or disable concepts. Search ignores disabled concepts when matching users questions to the articles in the knowledge base.

To update a concept, do the following:

1. Locate and double-click on the concept to open the **Concept Details** window.
2. Edit the concept description in the **Description** text box if desired.
3. Add or edit synonyms as desired.
4. Click **Save** or **Save and Close** to update the changes.

To enable or disable a concept, do the following:

1. Locate and double-click on the concept to open the **Concept Details** window.
2. Click on the check box to change the state of the concept.
3. Click **Save** or **Save and Close** to update the changes.

Enable a Disabled Concept

Occasionally, maintenance on the Dictionary includes disabling outdated out-of-the-box (OOTB) dictionary concepts. Once the concepts are disabled, their associated synonyms are also unavailable.

If you need to use a concept that was disabled, you can enable it again. After you enable the concept, the synonyms associated with it are also available.

1. Navigate to My Enterprise, Setup and Maintenance.
2. Navigate to Service, Knowledge, Manager Search Dictionary.
3. In the Find box, enter the name of the concept you want to enable and click the search icon.

   The concept you searched for appears in the list of concepts. Notice that there is no check mark next to the concept in the Enabled column.
4. Click the concept to open the Concept Details window.
5. Click the Enabled field to enable the concept.
6. Click Save and Close.

After a successful content processing run, the concept is enabled and available for searching.

Set Scores for Concepts in the Dictionary

You may want to tune your search results so that specific articles appear closer to the top of the search results. You can help achieve this result by updating the scores of the concepts in the dictionary.

A concept score is a value that reflects the importance of the concept to your organization. This score helps establish how relevant a document is to the search question during document retrieval and ranking. All dictionary concepts have an original score. How the concept gets its original score depends on the concept type.

- Default (Out of the Box) concepts are assigned scores during the ontology development cycle.
- Custom concepts (those concepts your organization creates) are assigned the default score High.
- Product concepts are assigned scores during the content indexing process. Product concept scores can vary depending on the number of articles that mention the product name.

A concept score has a value of High, Medium, or Low, where High represents a concept that is very important to your organization and Low represents a concept that is not as important.

You can add a score for new concepts or change the score for any existing concepts in the dictionary.

1. Click **Setup and Maintenance** and navigate to **Knowledge Management Search Dictionary.**
2. At **Manage Synonyms**, enter a term and click the Search icon.
3. Select a concept.
4. At the **Concept Details** menu, select a value in the **Score** field.
5. Click **Save**.

   Your changes will take effect after an incremental content processing completes successfully.

Enable Search to Add Product Names to the Dictionary Automatically

You can enable search to automatically add product names located in external document collections to the Search dictionary. The application creates new concepts for the product names that it discovers during content processing.

Adding product names to the dictionary improves search accuracy because search will treat product name concepts as important search terms, and will rank documents that contain those product names higher in search results. You can also add synonyms to product name concepts to help match common terms that users ask about to specific products and services.

You enable automatic product name concepts by setting a profile option. When you turn the profile on, the application automatically generates product concepts from product names and adds them to the dictionary. It also shows any name changes in existing products, except for the products you modified manually with the Manage Search Dictionary tool.

1. Go to **Setup and Maintenance**.
2. At the Setup menu, select **Service, Knowledge Management**.
3. At the Company Profile panels, select **Manage Knowledge Search Profile Options**.
4. Select **CSO_ENABLE_AUTO_PRODUCT_CONCEPT_GENERATION** profile.
5. Select **Yes** to apply the profile to your site.

   You will see the effects of automatic product concept generation after the next content processing cycle completes.

You can disable this profile, but be aware that turning it off may compromise search accuracy. The application won't generate product concepts from product names and will remove the existing product concepts from the dictionary, except for the product concepts you modified manually with the Manage Search Dictionary tool. To disable this profile, select **No**.

Industry-Specific Search Dictionaries

As a knowledge manager, you can choose a search dictionary that is more relevant to your business than the default Customer Help dictionary. Industry-specific search dictionaries result in more accurate search results, and are translated into all supported languages.

Industry dictionaries include concepts, synonyms, and other features that optimize search results for your business. For example, the Finance industry dictionary comes with pre-defined financial concepts and synonyms that enable the search to fetch the most relevant answers for your search terms.

You can choose one of the following dictionaries:

- **Customer Help** is the default, and includes concepts like Service Request, Customer Satisfaction and Purchase Order. Customer Help is included in all industry dictionaries, so changing from customer help to an industry dictionary does not remove any concepts.
- **Computer** includes concepts like JDBC Connector, Public Key Certificate, and Read Only.
- **Finance** includes concepts like Vesting Schedule, Variable Interest Loan and Slush Fund.
- **Insurance** includes concepts like Dwelling Fire Policy, Claim Adjusting and Optional Coverage.
- **Telecommunications** includes concepts like Android, Family Plan and Internet Traffic.
- **Travel** includes concepts like Booking Code, Advance Seat Reservation and Twin Cabin. It also includes airport concepts and IATA airport codes, such as Frankfurt Airport and New York John F Kennedy Airport (JFK), and contextual recognition of ambiguous IATA airport codes. Contextual recognition of ambiguous airport codes of the Travel industry dictionary is available in 5 languages: English, Spanish, German, French, Italian. For example, the IATA airport code WAS (Washington Airports) is the same string as the verb was in English. Contextual recognition looks at the context of the user's question to determine whether the string is a verb or an airport code.

Select an Industry-Specific Search Dictionary

You can swap the default search dictionary of the application for an industry-specific dictionary. Selecting an industry-specific search dictionary can fetch better search results for your search terms.

Changing from the Customer Help to your industry-specific dictionary does not affect product concepts or any concepts that you added or modified. Changing the dictionary takes effect immediately in Manage Search Dictionary, and after content processing, the newly selected industry concepts and synonyms will be used to determine the most relevant search results.

1. Go to Setup and Maintenance, select the Service offering and then select Knowledge Management.
2. Select Manage Knowledge Search Dictionary.
3. Select Change and you will see a warning message about the impact of changing the dictionary.
4. Select Continue and select an industry from the list.
5. Click Apply to see an industry change confirmation.

Use Good Document Titles

You want your customers to have a productive experience when they search for answers, starting with strong, relevant document titles.

A strong document title identifies a topic and begins to inform the customers about the content. A poor title can obscure vital information so your customers may not select it although it contains the desired content.

Search Can Assign Titles to PDFs

In many cases, some or all of the articles in your collections are PDFs.

Most PDFs have a visual title, which is a string of text on the first page that most readers would recognize as the title, for example Mobile Phone User Manual or How to Read a Stock Report. However, not every visual title is that easy to spot. There may be many lines of text on the first page, or maybe no text at all. So how does Search determine the visual title to match to a search request?

Search uses the automatic PDF title discovery feature to determine PDF titles. It finds the visual title of a PDF automatically and uses it for title matching and as the search result title. A key advantage to the title discovery feature is you don't have to do any additional authoring to provide the best search result title.

The title discovery evaluates the PDF for visual factors, such as:

- The size of the font. Usually the larger text on a first page denotes a title.
- The position of the text, for example, the first few sentences of the PDF.
- The phrase length and distance between lines of the text.

For example, a string of text appears on a first page of a PDF as:

Oracle [Font Size 30, Bold, Red]

User Guide [Font Size 24, Bold]

Knowledge Management [Font Size 20]

Version 1.1 [Font Size 18]

This user guide describes how to use Knowledge applications [Font Size 11]

Most users wouldn't read this string of text as:

- Oracle, or
- Version 1.1, or
- This user guide describes how to use Knowledge applications.

But they would read this text as:

- Oracle User Guide or User Guide
- Oracle User Guide Knowledge Management or User Guide Knowledge Management
- Oracle User Guide Knowledge Management Version 1.1 or User Guide Knowledge Management Version 1.1

So, in this example the PDF title discovery automatically determines the best titles for search accuracy as **Oracle User Guide Knowledge Management Version 1.1**, or **User Guide Knowledge Management Version 1.1**.

If the PDF has no string of text on the first page, making it impossible to find a visual title to assign, it selects one of the following as a search result title:

- The title in the PDF's properties, if a properties title is defined.
- The PDF's file name.

> **Note:** The visual title that Search assigns to a PDF appears as a search result title only after the full content processing cycle is complete.

How to Disable the Automatic PDF Title Discovery

The PDF title discovery feature is enabled when you open the application, but you can disable it. However, be aware that disabling this option may severely compromise search accuracy. If you do disable it, you will see the following warning message:

Enable the automatic title discovery for PDFs. Test thoroughly as this changes impact search accuracy. Search will reflect the change after content processing completes.

When this configuration option is off, the application assigns a search result title for a PDFs as if there is no visual title available. The change of this option takes effect after the next content processing cycle completes. To disable the automatic PDF title discovery:

1. Log in and click **Setup and Maintenance**.
2. At the Setup menu, scroll down and select **Service**.
3. At Functional Areas, select **Knowledge Management**.
4. At Knowledge Management, click **Manage Knowledge Search Profile Options**.
5. At the Manage Knowledge Search Profile Options page, click **CSO_AUTO_PDF_TITLE_DISCOVERY**.
6. At the Site menu, select **No**.

7 Analyze Knowledge

Knowledge Analytics

Knowledge Analytics is a real-time reporting solution that enables knowledge managers and knowledge analysts to view knowledge author's activity. Analytics provides prebuilt dashboards to help knowledge managers to understand how authors are creating, updating, and publishing knowledge base articles and how they are linking articles to SRs.

Depending on your privileges, you can perform the following tasks:

- Run the prebuilt dashboard reports
- Create personalized dashboards
- Create personalized reports and analyses on subject areas
- Share analytics with other users

Note: Access to the analytics data is restricted based on roles. Analytics reports users will see only the data that they have access to, based on their roles and privileges. For more information on creating and assigning roles, see the **Create Knowledge Roles** topic in this guide.

Knowledge Analytics Terminology

It is helpful to familiarize with the BI objects to understand knowledge analytics.

This table contains important analytics terminology:

Term	Description
Analytics	Business intelligence objects, such as analyses and dashboards, that provide meaningful data to help with decision making.
Analysis	A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.
Dashboard	A collection of analyses and other content, presented on one or more pages to help you achieve specific business goals
Report	An output of select data in a predefined format that is optimized for printing.
Subject Area	Subject areas are the organizational units in the BI repository that contain metadata that define which columns you can include in analyses. Each subject area has a fact folder and a number of dimension folders.

Manage Analytics with the BI Administrator Role

The knowledge manager role is not authorized to perform high level tasks in the BI application.

You need the BI Administrator role to perform the following tasks:

- Personalize dashboards, reports, and analyses.
- Manage catalog groups.
- Assign privileges.
- Schedule the publisher.

To create and assign the BI administrator role, use the process described in the Sales and Fusion Service Creating and Administering Analytics guide.

Related Topics

Responsive Sizing for Knowledge Analytics

You can enable responsive sizing to optimize analytics display on devices that have different screen resolution and size, such as laptops, tablets, and mobile phones.

To enable responsive sizing, use the process described in Optimize Analytics Display in the Sales and Fusion Service Creating and Administering Analytics guide.

Related Topics

- Why Use Responsive Sizing?

Manage the BI Catalog Folders

All reports, analyses, and dashboards are stored and managed in the Oracle Business Intelligence (BI) catalog.

The pre-built knowledge dashboards are stored in the BI Catalog under Shared Folders in the Service Folder, and are organized as follows:

- **Subject Area Contents**. This folder contains data related to subject areas.
- **Analytics Library**: This folder contains generic analytics content which is not role-specific.
- **Embedded Content**. The Knowledge dashboards are available in the Knowledge Analyst folder. You can use this folder to view and personalize the prebuilt dashboards.

Navigate to the Catalog

To access the catalog:

1. Click **Tools**, **Reports and Analysis** from the Knowledge Home page.
2. Click **Browse Catalog** in the Reports and Analytics page.

   The **Catalog** folder opens.

Save Analytics to the BI Catalog

Knowledge Managers can save analyses, dashboards, and reports in the BI catalog. The catalog contains a hierarchy of folders that enables you to store objects. You can also create additional folders and add permissions to these folders.

Note: Knowledge Analysts can only view prebuilt dashboards and run reports and analyses that they have access to.

- **Shared Folders.** This folder contains prebuilt dashboards and personalized analytics that you have permission to access. All the users with permissions to this folder can view your data. The shared folder contains Custom and Service sub-folders.
- **Custom Folder.** This is a sub-folder of the Shared Folders. Save copies of prebuilt dashboards to this folder before editing them.
- **My Folders.** This folder contains reports and analyses that you have created. Only you can access the contents of this folder. You can share the contents in this folder by copying and saving the files to the Shared Folders.

To create folders and add permissions to them, use the process described in the Oracle Applications Cloud Creating and Administering Analytics and Reports guide.

Related Topics

- How to Create OTBI Folders
- Set Folder Permissions and Attributes

Dashboards

A dashboard is a collection of reports and analyses organized to display data in a single view. The prebuilt dashboards are available in the BI catalog. Knowledge Analysts can view prebuilt dashboards and Knowledge Managers can create personalized dashboards.

The information displayed in a dashboard is organized by a set of parameters and metrics. For example, the All Knowledge Breakdown dashboard contains data about all the articles available by products, by categories, by content types, and by locales. You can configure the content on this dashboard (see the Personalize Dashboards topic). You can access dashboards to view analytics for the following types of data:

- All Knowledge: The reports on these dashboards show analytics for all knowledge transactions.
- My Knowledge: The reports on these dashboards show analytics for your transactional data.
- Knowledge Management Views: The reports on this dashboard shows article view metrics.
- Knowledge Question Analysis: The reports on this dashboard shows analyses of user questions.

When you access the dashboards you may see filters that you select to open a report. These filters let you target specific data for your report.

- The Date Range filter selects the date range for the report. For example, if you want to view a report with data for the last 30 days, you select the start and end dates for 30 days.
- The Locale filter selects the locale (language and country) for the report.
- The Department filter selects the department for the report. Only users that have access to the selected department can see the report. This filter is mandatory.
- The By Product, By Category, By Content (types) and By Locale filters let you to target specific content metrics data for the All Knowledge dashboards.

The following table lists the prebuilt dashboards and the reports on each dashboard.

Dashboard Name	Description
All Knowledge Breakdown	This dashboard shows the content available in the repository filtered by product, category, content type, and locale. This dashboard has the following reports: • The **By Product (All Articles By Product)** report shows the number of articles listed by product. Click the link in the Article Count column to see the articles. • The **By Category (All Articles By Category)** report shows the number of articles listed by category. Click the link in the Article Count column to see the articles • The **By Content (All Articles By Content Type)** report shows the number of articles listed by content types (such as FAQ). Click the link in the Article Count column to see the articles. • The **By Locale (All Articles By Locale)** report show the number of articles listed by locale. Click the link in the Article Count column to see the articles. **Note:** Before using this dashboard, run the below-mentioned scheduled processes. • Refresh Denormalized Time Dimension Table for BI • Knowledge Content Batch Process • Refresh Service Categories for Reporting
All Knowledge By Day	This dashboard shows all the user activity for the last 12 days. This dashboard has the following reports: • The **All Articles Create**d report shows the articles created in the last 12 days. • The **All Articles Updated** report shows the articles updated in the last 12 days. • The **All Articles Published** report shows the articles published in the last 12 days. • The **All Articles Linked** report shows the articles linked to service requests in the last 12 days.

Dashboard Name	Description
	Note: Before using this dashboard, run the below-mentioned scheduled processes. • Refresh Denormalized Time Dimension Table for BI • Knowledge Content Batch Process • Refresh Service Categories for Reporting
All Knowledge By Month	This dashboard shows all the user activity for the last 12 months. This dashboard has the following reports: • The **All Articles Created** report shows the articles created in the last 12 months. • The **All Articles Updated** report shows the articles updated in the last 12 months. • The **All Articles Published** report shows the articles published in the last 12 months. • The **All Articles Linked** report shows the articles linked to service requests in the last 12 months. **Note:** Before using this dashboard, run the below-mentioned scheduled processes. • Refresh Denormalized Time Dimension Table for BI • Knowledge Content Batch Process • Refresh Service Categories for Reporting
All Knowledge By Week	This dashboard shows all the user activity for the last 12 weeks. This dashboard has the following reports: • The **All Articles Created** report shows the articles created in the last 12 weeks. • The **All Articles Updated** report shows the articles updated in the last 12 weeks. • The **All Articles Published** report shows the articles published in the last 12 weeks. • The **All Articles Linked** report shows the articles linked to service requests in the last 12 weeks. **Note:** Before using this dashboard, run the below-mentioned scheduled processes. • Refresh Denormalized Time Dimension Table for BI • Knowledge Content Batch Process • Refresh Service Categories for Reporting

<table>
<tr><th>Dashboard Name</th><th>Description</th></tr>
<tr><td>Knowledge Management Views</td><td>This dashboard shows the article views metrics. It also shows a list of the most popular articles in the knowledge base. This dashboard has the following reports:

The Article View Insights report shows article view metrics.
The Top Articles report shows a list of the most popular articles in your knowledge base. You enter the number articles you want to see in the Top field, for example if you want to see the top 20 articles, you enter 20.
The Top Products report shows the top article products. You enter the number of products you want to see in the Top field, for example if you want to see the top 20 products associated with articles in the knowledge base, you enter 20
The Top Categories report shows the top article products. You enter the number of categories you want to see in the Top field, for example if you want to see the top 20 categories associated with articles in the knowledge base, you enter 20.

Note: Before using this dashboard, run the below-mentioned scheduled process.

Knowledge Search Aggregation
Knowledge Article View Aggregation
</td></tr>
<tr><td>Knowledge Question Analysis</td><td>This dashboard shows aggregated information about Knowledge Management search queries. To select reports on this dashboard, you must first select the data range, department, and locale for the reports. This dashboard has the following reports:

The Concept Analysis report shows how often concepts show up in end-user searches. It helps you see which concepts are being searched for by end-users most, how often the concept appears in questions and how many answers exist in your knowledge base to address them. Drill down on the Concept token column to show concept synonyms for default concepts or industry specific concepts.
The Questions Analysis report shows keywords and phrases end-users searched on. It's useful for analysts to see what words or topics end-users are searching for most often and how many answers exist to address those topics. Drill down on the Question Count column to open the Question Count Drill down that provides question details.
The Question Summary report shows search question activity during a time period.
The Unknown Word Analysis report shows how often unknown words show up in end-user searches. It helps you see which unknown words customers are searching on, how often they appear in questions and how many answers exist to address them.

Note: Before using this dashboard, run the below-mentioned scheduled process.

Knowledge Search Aggregation
Knowledge Article View Aggregation
</td></tr>
<tr><td>My Knowledge By Day</td><td>This dashboard shows the activity that individuals performed in the last 12 days. This dashboard shows the following reports:

The Articles Created report shows the articles an author or other individual created in the last 12 days.
</td></tr>
</table>

<table>
<tr><th>Dashboard Name</th><th>Description</th></tr>
<tr><td></td><td>The Articles Updated report shows the articles an author or other individual updated in the last 12 days.
The Articles Published report shows the articles an author or other individual published in the last 12 days.
The Links Done By report shows the links an author or other individual created in the last 12 days.
The Links Done For report shows the links created for an author or other individual in the last 12 days
Note:
Before using this dashboard, run the below-mentioned scheduled processes.
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The Articles Created report shows the articles an author or other individual created in the last 12 months.
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The Articles Published report shows the articles an author or other individual published in the last 12 months.
The Links Done By report shows the links an author or other individual created in the last 12 months.
The Links Done For report shows the links created for an author or other individual in the last 12 months.
Note:
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Refresh Service Categories for Reporting</td></tr>
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Dashboard Name	Description
	• The **Articles Updated** report shows the articles an author or other individual updated in the last 12 weeks. • The **Articles Published** report shows the articles an author or other individual published in the last 12 weeks. • The **Links Done By** report shows the links an author or other individual created in the last 12 weeks. • The **Links Done For** report shows the links created for an author or other individual in the last 12 weeks. **Note:** Before using this dashboard, run the below-mentioned scheduled processes. • Refresh Denormalized Time Dimension Table for BI • Knowledge Content Batch Process • Refresh Service Categories for Reporting

Access Prebuilt Dashboards

The prebuilt dashboards are available in the Catalog folder.

To access dashboards:

1. In the Setup and Maintenance work area, go to **Tools**, **Reports and Analysis** and then click **Browse Catalog**.

   The **Catalog** page opens.
2. From the Folders hierarchy, expand Shared Folders, Service, Embedded Content, Knowledge Analyst, Dashboards and then select a dashboard.
3. Select the filters for the report where appropriate. For example, to open the Knowledge Question Analysis dashboard you must select the Department filter.
4. Click **Open**.

Personalize Dashboards

Knowledge managers can personalize the prebuilt dashboards to optimize the data presentation to suit your organizations' needs. You can also filter information by the available metrics, add and delete pages and objects, and change dashboard properties.

To personalize a dashboard:

1. Click Tools, Reports and Analysis and then click **Browse Catalog**.

The **Catalog** page opens.

2. From the Folders hierarchy, expand Shared Folders, Service, Embedded Content, Knowledge Analyst, Dashboards and then select a dashboard.
3. Expand More, click **Copy** to copy the dashboard and then click the **Paste** icon in your Custom folder location.

   The dashboard is copied to your location.
4. Copy and Paste the related objects of this dashboard to the Custom folder.

   > **Note:** You must copy the objects associated with the dashboard in order to edit it.

5. Click **Edit** and perform one or more of the following tasks, as needed:
   - Add and delete pages.
   - Add and remove content of the dashboard.
   - Drag and drop within a page to move content around.
   - Change the layout of a page.
6. Perform one of the following steps at any time:
   - To preview the dashboard page, click the **Preview** button.
   - To save your changes, click the **Save** button.
   - To exit the Dashboard builder and return to the Dashboard, click **Run**.

Subject Areas

Knowledge Analytics uses subject areas to create interactive reports and analyses. Subject areas contain metadata that define which columns are available for you to create a report or analysis.

Related Topics

- Dimensions and Facts
- Article Real Time Subject Area
- Article Links Real Time Subject Area
- Article Category Real Time Subject Area
- Article Product Real Time Subject Area

Dimensions and Facts

A subject area contains dimensions and facts.

- **Dimension:** Dimensions are the knowledge parameters such as articles, dates, and categories that can be measured using facts. Dimensions contain reference information and serve as columns in the report tables.

  Note: You need to select at least one dimension to generate a report.

- **Facts:** Facts quantify dimensions. In the reports, a fact displays values for the selected dimensions. For example, the measure for Articles dimension is 'Number of Articles'. A fact can be associated with multiple dimensions.

How can I Use Subject Areas to Answer Business Questions?

You can build reports and analyses to answer business questions. Each knowledge subject area is built around a unique set of business questions for a particular context, such as the number of articles being published, and the number of articles linked to SRs.

You can choose the appropriate facts and dimensions listed in a subject area to answer your business questions. Using different combinations of facts and dimensions, you can generate different types of reports.

Note: Access to Analytics data is restricted, based on user roles. So regardless of the data you include in your reports, the users looking at Analytics reports will see only the data that they have access to based on their roles and privileges.

Subject Area	Key Business Questions
Article Real Time	How many articles are available in the knowledge base? Which articles are published or unpublished?
Article Links Real Time	How many links exist between services requests and knowledge articles? Which articles are linked to the maximum number of service requests?
Article Category Real Time	Which category contains the highest number of knowledge articles? Which articles are linked to a category?
Article Product Real Time	Which products are associated with the most number of knowledge articles? Which articles are linked to a product?

Subject Area	Key Business Questions
Article User Group	How many articles are consumed by a particular user group during a specified period? Which user groups area associated to an article?

Article Real Time Subject Area

The Article Real Time subject area enables you to create reports that provide information on articles in your knowledge base, such as the version, locale, content type, author, and lifecycle dates. It also provides information on employee interaction with articles.

This subject area doesn't include product, category, or linking information.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Definition
Article Version	Answer ID	The unique identifier of the article. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The identifier of the article.
	Article Last Updated Date	The date that the article is last updated.
	Article Latest Version	The latest version of the article.
	Article Locale	The language and region of the article.
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.

Dimension Folder	Dimension	Definition
	Article Minor Version	The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Published Date	The date on which the article is published.
	Article Status	The latest article status
	Article Title	The title of the article.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the locale to which the article belongs.
	Creation Date	The date on which the article is added to the repository.
	Department	The department of the article.
	Original Creation Date	The date on which the article is originally created and imported.
	Owner ID	The identifier of the article's owner.
	Version	The current version of the article.
	Published	The article is marked as published.
Content Type	Content Type	The type of content such as an article, or FAQ.
Employee	Employee Extension	The folder that contains dimensions for employees who owned article versions. Employees must be assigned the Resource role to be visible in reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
	Version Article Owner Resource Hierarchy:	The available hierarchy for the employee version article owners.

Dimension Folder	Dimension	Definition
	Current Level -1 - Current Level - 16 Login Current Level -1 - Current Level - 16 Resource Name Current Level 1 - Current Level 16 Position Code Current Level 1 - Current Level 16 Position Name Current Level 1 - Current Level 16 Resource Id Current Level 1 - Current Level 16 Resource Organization Code Level 1 - Current Level 16 Resource Organization Name Level 1 - Current Level 16 Resource Name Current Base, Current Top Level - Login Current Base, Current Top Level - Position Code Current Base, Current Top Level - Position Name Current Base, Current Top Level Resource Id Current Base, Current Top Level Organization Code Current Base, Current Top Level Organization Name Current Base, Current Top-Level Resource Name Direct Reports Fixed Hierarchy Level Hierarchy Based Login User Organization Direct Reports Name User Organization Hierarchy Based Login	
	Resource Hierarchy Address Line 1 - Address Line 4 City State County Country	The employee address.
	Employee Job Title	Describes the employee job title.

Dimension Folder	Dimension	Definition
	Employee Job Title Name	The employee's job title.
	Employee Login	The login of the employee.
	Employee Login Name	The employee's login name.
	Employee Party Id	The employee party identifier.
	Employee Row ID	The table row identifier stored in the source system for the employee.
	First Name	The employee's first name.
	From Date	The start date.
	Hire Date	The employee's date of hire.
	Internal	An internal code.
	Key ID	A unique identifier for a dimension or fact.
	Last Name	The employee's last name.
	Manager E-mail Address	The employee's manager's email address.
	Manager ID	The employee 's manager's identifier.
	Manager Job Title	The employee's 'manager's job title.
	Manager Job Title Name	The employee's manager's job title.
	Manager Login ID	The employee's manager's login identifier.
	Manager User Name	The employee's manager's user name.
	Manager of Employee	The employee's manager.
	Middle Name	The employee's middle name.
	Name	The employee's name.

Dimension Folder	Dimension	Definition
	Parent Organization	The parent organization to which the employee belongs.
	Parent Organization Name	The name of the parent organization.
	Person ID	The person identifier.
	Phone Line Type	The employee's phone line.
	Postal Code	The employee's postal code.
	Previous Last Name	The employee's previous last name, if applicable.
	Primary Email	The employee's primary email.
	Primary Phone Primary Phone Area Code Primary Phone Country Code	The employee's primary phone number, area code and country code.
	Resource Primary Organization	The organization for the Resource role.
	Resource Primary Organization Name	The organization name for the Resource role.
	Resource Profile ID	The profile identifier for the Resource role.
	Salutation Introduction	The salutation name.
	Suffix	The employee article version owner's suffix, for example, Jr. or III.
	Title	The employee's personal title, (for example Mr. or Dr.).
	To Date	The end date.
	User Creation Date	The date the user created the article.
	User Name	The user's name.
	User Status	The user's status.

Dimension Folder	Dimension	Definition
Employee Original Article Author	To view the hierarchy and dimensions in this folder see the dimensions in the **Employee** folder in this table.	The folder that contains dimensions for employees who created articles. Employees must be assigned the Resource role to be visible in reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Version Article Author	To view the hierarchy and dimensions in this folder, see the dimensions in the **Employee** folder in this table.	The folder that contains dimensions for employees who created versions of articles. Employees must be assigned the Resource role to be visible in reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Secondary Dates	Update Date	The date on which the article is updated.
	Update Day Name	The day on which the article is updated.
	Update Enterprise Period	The enterprise period in which the article is updated.
	Update Enterprise Year	The enterprise year in which the article is updated.
	Update Month	The month in which the article is updated.
	Update Quarter	The quarter in which the article is updated.
	Update Year	The year in which the article is updated.
Secondary Dates - Additional Attributes	Update Calendar Month Update Calendar Month End Date Update Calendar Month Start Date Update Calendar Quarter Update Calendar Quarter Start Date Update Calendar Quarter End Date Update Calendar Week Update Calendar Week Start Date Update Calendar Week End Date Update Day Of Month Update Day Of Week	The additional attributes that denote the period in which the article is updated. See the For more information, see Time Additional Attributes in the Article Links Real Time Subject Area table.

Dimension Folder	Dimension	Definition
	Update Day Of Year Update Enterprise Period End Date Update Enterprise Period Number Update Enterprise Period Start Date Update Enterprise Quarter End Date Update Enterprise Quarter Number Update Enterprise Quarter Start Date Update Enterprise Year End Date Update Enterprise Year Number Update Enterprise Year Period Number Update Enterprise Year Start Date Update Offset Week Update Week Update Week By Year	
Time	Date Day Name Enterprise Period Enterprise Quarter Enterprise Year Month Quarter Week Year	The Time-related attributes of the article. For more information, see Time attributes in the Articles Links Real Time Subject Area.
Time - Additional Attributes	Calendar Date Calendar Month Calendar Month End Date Calendar Month Start Date Calendar Quarter Calendar Week Start Date Calendar Week End Date	The additional time attributes available. For more information, see Time Additional Attributes in the Article Links Real Time Subject Area.

Dimension Folder	Dimension	Definition
	Calendar Week Calendar Week Start Date Calendar Week End Date Calendar Year Calendar Year Start Date Calendar Year End Date Day of Month Day of Week Day of Year Enterprise Period End Date Enterprise Period Number Enterprise Period Sort Order Enterprise Period Start Date Enterprise Quarter End Date Enterprise Quarter Number Enterprise Quarter Start Date Enterprise Year End Date Enterprise Year Number Enterprise Year Period Number Enterprise Year Start Date Offset Week Week By Year Year By Week	
Version Author	User E-mail User First Name User Last Name User Locale User Login	The E-mail, first name, last name, locale, and login details of the author for the current version.
Version Locale	Locale Code Locale Description	The locale and its description to which the current version of the article belong.

Dimension Folder	Dimension	Definition
Version Owner	User E-mail User First Name User Last Name User Locale User Login	The E-mail, first name, last name, locale, and login details of the owner for the current version.

The following table lists the facts of the article real time subject area:

Fact Folder	Fact	Definition
Article Facts	# of Article Locales	The number of article locales.
	# of Article Versions	The number of article versions.
	# of Articles	The number of articles.

Article Links Real Time Subject Area

The Article Links Real Time subject area contains information about articles linked to from service requests. Only articles linked to service requests, and service requests linked to articles, appear in this subject area. All the articles are listed by their IDs in this dashboard.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Definition
Article Version	Answer ID	The unique identifier of the article.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The article identifier.

Dimension Folder	Dimension	Definition
	Article Last Updated Date	The date the article was last updated.
	Article Latest Version	The latest version of the article
	Article Locale	The article locale (language and region).
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Minor Version	The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1.
	Article Publish Date	The date the article is published.
	Article Status	The latest article status.
	Article Title	The article title.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the base locale.
	Content Type	The type of the content, for example, article or FAQ
	Creation Date	The date on which the article is added to the repository.
	Department Name	The name of the department.
	Original Creation Date	The date on which the article was originally created and imported.
	Published	The article is marked as published.
	Version	The current version of the article.
	Version Locale Code	The locale code for the version of the article.

Dimension Folder	Dimension	Definition
	Version Locale Description	The description of the locale for the version of the article.
Article Links	Answer ID	The identifier of the answer.
	Article Locale	The locale to which the article belongs.
	DeletedFlag	The flags that are deleted from an article.
	Helpful	A link that has been considered helpful by users or agents.
	Linked	The article or document linked to an article
	Link Created By	The user who created the link to the article.
	Link Creation Date	The date on which the link is created.
	Reference ID	The reference identifier of the article link.
	Service Request ID	The identifier of the service request.
	Shared	A link that was shared by agents or users.
Employee	To view the hierarchy and dimensions for this folder, see the **Employee** folder in the **Article Real Time Subject Area topic.**.	The folder that contains dimensions for employees who owned article versions. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Original Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created original articles. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Version Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created versions of an article. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.

Dimension Folder	Dimension	Definition
Product - Service Request	Product Group Extension - Service Request	**The product group of the service request.**
	Item Delete Flag	The item is marked to be deleted
	OrderableFlag	The item is marked as ready to select.
	Part Number	The product's part number.
	Prod Group Delete Flag	The product group is marked to be deleted.
	Prod Group Effective End Date	The end date of the product group.
	Prod Group Effective Start Date	The start date of the product group.
	Product Description	The description of the product.
	Product Line	The line to which the product belongs.
	Product Name	The name of the product.
	Product Row ID	The row identifier of the product.
	Product Type	The type of product.
	Service Request Catalog Hierarchy Name 1-12	The name of the service request catalog hierarchy at levels 1-12.
	Usage Code	The code for the type of product usage. It can be Base usage, Service usage, or HCM usage codes.
Service Category - Service Request	Base Service Category ID	The identifier of the category to which the base service belongs.
	Base Service Category Name	The name of the category to which the base service belongs.
	Business Unit ID	The identifier of the business unit.
	Fixed Hierarchy Level	The level of the fixed hierarchy
	Level 1- Level 8 Service Category ID	The identifier of the service category available at levels 1 through 8.

Dimension Folder	Dimension	Definition
	Level 1- Level 8 Service Category Name	The name of the service category available at levels 1 through 8.
	Stripe	The stripe to which the category belongs.
	Top Level Service Category ID	The identifier of the service category available at the top level of the hierarchy.
	Top Level Service Category Name	The name of the service category available at the top level of the hierarchy.
		The out-of-the-box service request attributes.
Time	Date	The date on which the article is linked.
	Day Name	The name of the day on which the articles are linked.
	Enterprise Period	The enterprise period in which the articles are linked.
	Enterprise Quarter	The enterprise quarter in which the article is linked.
	Enterprise Year	The enterprise year in which the article is linked.
	Month	The month in which the article is linked.
	Quarter	The quarter in which the article is linked.
	Week	The week in which the article is linked.
	Year	The year in which the article is linked.
Time- Additional Attributes	Calendar Date	The date of the time period.
	Calendar Month	The identifier of the calendar month.
	Calendar Month End Date	The end date of the calendar month.
	Calendar Month Start Date	The start date of the calendar month.
	Calendar Quarter	The identifier of the calendar quarter.

Dimension Folder	Dimension	Definition
	Calendar Quarter Start Date	The start date of the calendar quarter.
	Calendar Quarter End Date	The end date of the calendar quarter.
	Calendar Week	The identifier of the calendar week.
	Calendar Week Start Date	The start date of the calendar week.
	Calendar Week End Date	The end date of the calendar week.
	Calendar Year	The number identifier of the calendar year.
	Calendar Year Start Date	The start date of the calendar year.
	Calendar Year End Date	The end date of the calendar year.
	Day of Month	The day of the month.
	Day of Week	The day of the week.
	Day of Year	The day of the year.
	Enterprise Period End Date	The end date of the enterprise period.
	Enterprise Period Number	The identifier of the enterprise period.
	Enterprise Period Sort Order	The sort order
	Enterprise Period Start Date	The start date of the enterprise period.
	Enterprise Quarter End Date	The end date of the enterprise quarter
	Enterprise Quarter Number	The number identifier of the enterprise quarter
	Enterprise Quarter Start Date	The start date for the enterprise quarter
	Enterprise Year End Date	The end date of the enterprise year
	Enterprise Year Number	The number of the enterprise year
	Enterprise Year Period Number	The period of the enterprise year

Dimension Folder	Dimension	Definition
	Enterprise Year Start Date	The start date of the enterprise year
	Offset Week	The week that can be compared to the previous week
	Week By Year	The week number of the year.
	Year By Week	The week day of the year.

The following table lists the facts of the article links real time subject area:

Fact Folder	Fact	Definition
Article Links Facts	# of Article Links	The number of article links.
	# of Article Helpful Links	The number of article links considered as helpful by agents or users.
	# of Article Shared Links	The number of article links shared by agents or users.

Related Topics

- Article Real Time Subject Area

Article Category Real Time Subject Area

The Article Category Real Time subject area provides information about the categories to which articles belongs. It also provides information on employee interaction with the articles. This subject area displays a one-to-many relationship from an article to a category.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Definition
Article Version	Answer ID	The unique identifier of the article. You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The article identifier.
	Article Last Updated Date	The date that the article was last updated.
	Article Latest Version	The latest version of the article
	Article Locale	The article locale (language and region)
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Minor Version	The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, or 1.2.
	Article Publish Date	The date the article is published.
	Article Status	The latest article status.
	Article Title	The title of the article.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the base locale.
	Content Type	The type of the content, for example, article or FAQ.
	Creation Date	The date on which the article is added to the repository.
	Department Name	The name of the department.

Dimension Folder	Dimension	Definition
	Original Creation Date	The date on which the article was originally created and imported.
	Published	The article is marked as published.
	Version Locale Code	The locale code for the version of the article.
	Version Locale Description	The description of the locale for the version of the article
Employee	To view the hierarchy and dimensions for this folder, see the **Employee** folder in the **Article Real Time Subject Area topic.**.	The folder that contains dimensions for employees who owned article versions. **Note:** Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Original Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created original articles. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Version Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created versions of an article. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Service Category	Base Service Category ID	The identifier of the category to which the base service belongs.
	Base Service Category Name	The name of the category to which the base service belongs.
	Base Unit ID	The identifier of the business unit.
	Fixed Hierarchy Level	The level of the fixed hierarchy
	Level 1 Service Category ID	The identifier of the service category available at level 1.

Dimension Folder	Dimension	Definition
	Level 1 Service Category Name	The name of the service category available at level 1.
	Level 2 Service Category ID	The identifier of the service category available at level 2.
	Level 2 Service Category Name	The name of the service category available at level 2.
	Level 3 Service Category ID	The identifier of the service category available at level 3.
	Level 3 Service Category Name	The name of the service category available at level 3.
	Level 4 Service Category ID	The identifier of the service category available at level 4.
	Level 4 Service Category Name	The name of the service category available at level 4.
	Level 5 Service Category ID	The identifier of the service category available at level 5.
	Level 5 Service Category Name	The name of the service category available at level 5.
	Level 6 Service Category ID	The identifier of the service category available at level 6.
	Level 6 Service Category Name	The name of the service category available at level 6.
	Level 7 Service Category ID	The identifier of the service category available at level 7.
	Level 7 Service Category Name	The name of the service category available at level 7.
	Level 8 Service Category ID	The identifier of the service category available at level 8.
	Level 8 Service Category Name	The name of the service category available at level 8.
	Stripe	The stripe to which the category belong.

Dimension Folder	Dimension	Definition
	Top Level Service Category ID	The identifier of the service category available at the top level.
	Top Level Service Category Name	The name of the service category available at the top level.
	Version	The current version of the article.
	Version Author Locale ID	The locale of the author of the latest version of the article.
	Latest Version Author Login	The login ID of the author of the latest version of the article.

The following table lists the facts of the article category real time subject area:

Fact Folder	Fact	Definition
Article Category Facts	# of Article Categories	The number of categories associated with a given article.
	# of Categories	The number of available categories.

Related Topics

- Article Real Time Subject Area

Article Product Real Time Subject Area

The Article Product Real Time subject area contains information about the category or categories an article belongs to. This subject area displays a one-to-many relationship from an article to a category.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Definition
Article Version	Answer ID	The unique identifier of the article. You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The identifier of the article.
	Article Last Updated Date	The date that the article was last updated.
	Article Latest Version	The latest version of the article.
	Article Locale	The language and region of the article
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Minor Version	
	Article Publish Date	The date on which the article is published.
	Article Status	The latest article status.
	Article Title	The latest article status.
		The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1 You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the base locale.
	Content Type	The type of the content, for example, article or FAQ.

Dimension Folder	Dimension	Definition
	Creation Date	The date on which the article is added to the repository.
	Department Name	The name of the department.
	Original Creation Date	The date on which the article was originally created and imported.
	Published	The article is marked as published.
	Version Locale Code	The locale code for the version of the article.
Employee	To view the hierarchy and dimensions for this folder, see the **Employee** folder in the **Article Real Time Subject Area topic.**.	The folder that contains dimensions for employees who owned article versions. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Original Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created original articles. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Version Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created versions of an article. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Product	Article Catalog Hierarchy 1 Name	The name of the article catalog hierarchy at level 1.
	Article Catalog Hierarchy 2 Name	The name of the article catalog hierarchy at level 2.
	Article Catalog Hierarchy 3 Name	The name of the article catalog hierarchy at level 3.
	Article Catalog Hierarchy 4 Name	The name of the article catalog hierarchy at level 4.

Dimension Folder	Dimension	Definition
	Article Catalog Hierarchy 5 Name	The name of the article catalog hierarchy at level 5.
	Article Catalog Hierarchy 6 Name	The name of the article catalog hierarchy at level 6.
	Article Catalog Hierarchy 7 Name	The name of the article catalog hierarchy at level 7.
	Article Catalog Hierarchy 8 Name	The name of the article catalog hierarchy at level 8.
	Article Catalog Hierarchy Base Level Name	The name of the article catalog present at the base level of the hierarchy.
	Article Catalog Hierarchy Top Level Name	The name of the article catalog present at the top level of the hierarchy.
	ItemDeleteFlag	The item is marked to be deleted
	OrderableFlag	The item is marked as ready to select.
	Part Number	The product's part number.
	ProdGroupDeleteFlag	The product group is marked to be deleted.
	Prod Group Effective End Date	The end date of the product group.
	Prod Group Effective Start Date	The start date of the product group.
	Product Description	The description of the product.
	Product Line	The line to which the product belongs.
	Product Name	The name of the product.
	Product Row ID	The row identifier of the product.
	Product Type	The type of product.
	Usage Code	The code for the type of product usage. It can be Base usage, Service usage, or HCM usage codes.

The following table lists the facts and definitions in the article product real time subject area::

Fact Folder	Fact	Definition
Article Product Facts	# of Article Products	The number of products associated with the articles.

Related Topics

- Article Real Time Subject Area

Article Real Time Rating Subject Area

The Article Real Time Rating subject area contains information about article ratings, such as ratings values, rated article details, and the users who rated the articles.

This subject area helps analysts identify content that satisfies users' needs, content that users are dissatisfied with, and content linked to SRs that effectively resolves them.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Description
Article	Article Display End Date	The last date on which the article will be available to end-users.
	Article ID	The article ID.
	Article Last Updated Date	The date on which the article was most recently updated.
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Minor Version	The minor version of the article. This version includes minor edits to the major version. The

Dimension Folder	Dimension	Description
		numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1.
	Locale	The locale in which the article is published.
	Creation Date	The date on which the article was created.
	Version	The current version of the article.
Employee	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who owned article versions. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Original Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created original articles. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Version Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder dimensions in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created versions of an article Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Ratings	Rating Type	The ID of the rating type, 2.0 for like/dislike or 4.0 for 5 star.
	Rating Name	The name of rating type, 5 star or like/dislike.
Rating Values	Rating Value	The actual rating value recorded.
	Date Added	The date that the user rated the article.
Rating Facts	Average Rating	The average of all ratings of an article.
	# of Ratings	The total number of ratings of an article.
	# of Rated Articles	The total number of articles rated by all users in the selected time period.

Dimension Folder	Dimension	Description
Content Type	Content Type	The content type of the rated article.
Rating Added By	User E-mail	The e-mail address of the user who rated the article.
	User First Name	The rating user's first name.
	User Last Name	The rating user's last name.
	User Locale	The locale of the user who rated the article.
	User Login	The login of the user who rated the article.
Time	Date	The time-related attributes of the article. For more information, see Time Attributes in the Article Links Real Time Subject Area.
	Day Name	
	Enterprise Period	
	Enterprise Quarter	
	Enterprise Year	
	Month	
	Quarter	
	Week	
	Year	
Version Locale	Locale Code	The locale and its description to which the current version of the article belongs.
	Locale Description	

Facts

Fact Folder	Fact	Description
Rating Facts	# of Rating	The number of ratings that were entered by all users in the selected time period.
	Average Rating	The sum of all rating values divided by the number of ratings entered.
	# of Rated Articles	The number of articles that were rated by all users in the selected time period.

Related Topics

- Article Real Time Subject Area

Article Reference Subject Area

The Article Reference Subject Area enables you to create reports that provide information on articles in your knowledge base which are linked to another article and the status of the linked article. The linked articles could be valid or invalid and this can be reported using this subject area.

This subject area doesn't include product and category information.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Definition
Article Version	Answer ID	The unique identifier of the article. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The identifier of the article.
	Article Last Updated Date	The date that the article is last updated.
	Article Latest Version	The latest version of the article.

Dimension Folder	Dimension	Definition
	Article Locale	The language and region of the article.
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Minor Version	The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Published Date	The date on which the article is published.
	Article Status	The latest article status
	Article Title	The title of the article.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the locale to which the article belongs.
	Creation Date	The date on which the article is added to the repository.
	Department	The department of the article.
	Original Creation Date	The date on which the article is originally created and imported.
	Owner ID	The identifier of the article's owner.
	Version	The current version of the article.
	Published	The article is marked as published.
Article References	Deleted Target	This flag is set to Y if the linked Article is deleted.

Dimension Folder	Dimension	Definition
	Draft Target	This flag is set to Y if the linked Article is in Draft state.
	Expired Target	This flag is set to Y if the linked Article is Expired. i.e If Articles Display End Date is less than the current date.
	Invalid Target	This flag is set to Y if source article is linked to a non existing article.
	Linked Answer Id	Linked Answer Id
	Linked Article Id	Linked Article Id
	Linked Article Locale Code	Linked Article Locale Code
Time	Date Day Name Enterprise Period Enterprise Quarter Enterprise Year Month Quarter Week Year	The Time-related attributes of the article. For more information, see Time attributes in the Articles Links Real Time Subject Area.

Facts

Fact Folder	Fact	Description
Article references Fact	# of Deleted Article References	Count is set to 1 If a linked document is deleted from the authoring application.
	# of Draft Article References	Count is set to 1 if an article in Draft status is linked.
	# of Empty Article References	Count is set to 1 if a non-existing article is linked. (This type of link is possible using API calls)
	# of Expired Article References	Count is set to 1 if a linked articles Display End Date is less than CURRENT_DATE. i.e Document is expired.
	# of Unique Source Articles	Count of Unique Source Articles which have Article References.
	# of Valid Article References	Count of valid Article References. If a linked article is not in the category of Deleted, Empty

Fact Folder	Fact	Description
		or expired then it is a valid article reference. <Draft is a valid reference>
	Total # of Invalid Article References	Count of invalid Article References. If a linked article is in the category of Deleted, Empty or expired then it is a invalid article reference. <Draft is not included>
	Total # of Reference	Count of distinct article references. Can be repeated against each anchor.

Related Topics

- Article Real Time Subject Area

Article Search Historical

This subject area provides detailed information on searches for knowledge management articles. In addition to search count information, it also contains normalized questions that you can report on.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Search Aggregation

Dimension Folder	Dimension	Definition
Facts	# of Normalized Questions	The number of normalized questions asked.
	# of Questions	The number of questions asked.
	Average # of Responses	The average number of responses to a query.
Normalized Question	Concept Terms	Words that are assigned as concepts
	Concept Tokens	The tokens associated with a concept.
	Department Name	The department associated with the normalized question.
	Normalized Question	A question from which the application has removed case distinctions, spelling errors, punctuation, skipped words, and other elements that may differentiate it from otherwise identical question

Dimension Folder	Dimension	Definition
	Normalized Question Locale Code	The locale code for a normalized question.
	Normalized Question Locale Description	The locale name for a normalized question.
	Unknown Terms	Terms not associated with a concept. This dimension uses straight brackets ([]).
	Unknown Tokens	Tokens not associated with a concept. This dimension uses curly brackets ({})
Time	Search Stat Calendar Month	The calendar month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Month End Date	The calendar month end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Quarter Start Date	The calendar quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter	The calendar quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured
	Search Stat Calendar Quarter End Date	The calendar quarter end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter Start Date	The calendar quarter start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year	The calendar year of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year End Date	The calendar year end date of the statistics (stat) date. This is the date on which the

Dimension Folder	Dimension	Definition
		aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year Start Date	The calendar year start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Date	The statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates captured
	Search Stat Month	The month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Quarter	The quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Year	The year of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.

Article Search Question Historical Subject Area

You can use the Article Search Question Historical subject area to report on users' questions and search terms to better understand how customers are finding knowledge base content. You can view search queries in normalized questions well as volume-related information.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Search Aggregation

Dimension Folder	Dimension	Definition
Article Search Question Facts	# of Concept Matches	The number of concepts that matched the search responses. (?)
	# of Questions	The number of questions asked.

Dimension Folder	Dimension	Definition
	# of Responses	The number of responses to a search. (?)
	# of Unknown Matches	The number of unknown concepts that matched the search responses.
Normalized Question	Concept Terms	Words that are assigned as concepts.
	Concept Tokens	The tokens associated with a concept. A token is a short, easily managed string including alphanumeric characters, spaces, and punctuation.
	Department Name	The name of the department.
	Normalized Question	A question from which the application has removed case distinctions, spelling errors, punctuation, skipped words, and other elements that may differentiate it from otherwise identical question.
	Normalized Question Locale Code	The locale code for a normalized question.
	Normalized Question Locale Description	The locale name for a normalized question.
	Unknown Terms	Terms not associated with a concept. This dimension uses straight brackets ([]).
	Unknown Tokens	Tokens not associated with a concept. This dimension uses curly brackets ({}).
Question	Question Text	The text or content of the question.
	Request Date	
Time	Search Stat Calendar Month	The calendar month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Month End Date	The calendar month end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.

Dimension Folder	Dimension	Definition
	Stat Calendar Quarter Start Date	The calendar quarter start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter	The calendar quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter End Date	The calendar quarter end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter Start Date	The calendar quarter start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year	The calendar year of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year End Date	The calendar year end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year Start Date	The calendar year start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Date	The statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates captured.
	Search Stat Month	The month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Quarter	The quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Year	The year of the statistics (stat) date. This is the date on which the aggregation job was

Dimension Folder	Dimension	Definition
		executed, and ratings and other updates captured.

Article Search Question Tokens Historical Subject Area

Knowledge managers can use the Article Search Question Tokens Historical subject area to report on users' questions and search terms to better understand how customers are finding knowledge base content. You can view search queries in normalized format as well as volume-related information.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Search Aggregation

The following table lists the dimensions of the Article Search Question Tokens Historical subject area.

Dimension Folder	Dimension	Definition
Article Search Question Tokens Facts	# of Questions Tokens	The number of question tokens.
	# of Concept Tokens	The number of concept tokens.
	# of Unique Normalized Questions	The number of unique normalized questions.
	# of Unique Tokens	The number of unique tokens.
	# of Unique Unknown Tokens	The number of unique tokens.
	Average # of Responses	The average number of responses to a user query.
Normalized Question	Concept Terms	Words that are assigned as concepts.
	Concept Tokens	The tokens associated with a concept. A token is a short, easily managed string including alphanumeric characters, spaces, and punctuation.
	Normalized Question	A question from which the application has removed case distinctions, spelling errors, punctuation, skipped words, and other

Dimension Folder	Dimension	Definition
		elements that may differentiate it from otherwise identical questions.
	Normalized Question Locale Code	The locale code for a normalized question.
	Normalized Question Locale Description	The locale name for a normalized question.
	Unknown Terms	Terms not associated with a concept. This dimension uses straight brackets ([]).
	Unknown Tokens	Tokens not associated with a concept. This dimension uses curly brackets ({}).
	Token	The name of the Search token.
	Token Description	The description of the Search token.
Time	Search Stat Calendar Month	The calendar month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Month End Date	The calendar month end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter	The calendar quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Quarter End Date	The calendar quarter end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Quarter Start Date	The calendar quarter start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year	The calendar year of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.

Dimension Folder	Dimension	Definition
	Search Stat Calendar Year End Date	The calendar year end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Calendar Year Start Date	The calendar year start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Date	The statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates captured.
	Search Stat Month	The month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Quarter	The quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Search Stat Year	The year of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.

Article Summary Historical Subject Area

This subject area contains information on knowledge management article historical metrics. This data shows how articles are ranked in popularity and which articles require updates. Users can create reports on article views, ratings, service request, links article creation, and publishing.

The historical data is refreshed on an hourly basis.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Article View Aggregation

Dimension Folder	Dimension	Definition
Article - Latest Version	Answer ID	The unique identifier for the article.

Dimension Folder	Dimension	Definition
		You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The identifier of the article.
	Article Latest Update Date	The date that the article was last updated.
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from your report but you must include it for the subject area join to work effectively.
	Article Published Date	The date on which the article is published.
	Article Status	The status of the article as set in Authoring.
	Article Title	The title of the article.
	Article Version	The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the locale.
	Content Type	The type of the content, for example, article, FAQ.
	Creation Date	The date on which the article is added to the repository.
	Department	The department of the article.
	Latest Version Locale Code	The locale code for the latest version of the article.
	Latest Version Locale Description	The description of the locale for the latest version of the article.

Dimension Folder	Dimension	Definition
	Original Creation Date	The date on which the article was originally created and imported.
	Published	The article is marked as published.
Article Summary	Rank	The rank represents article use within the previous 90 days, with a higher weight given to those viewed in more recent time periods. Use this column to sort any list of documents from most popular (highest value) to least popular (lowest value).
Employee	To view the hierarchy and dimensions for this folder, see the **Employee** folder in the **Article Real Time Subject Area topic.**.	The folder that contains dimensions for employees who owned article versions. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Original Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created original articles. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee Version Article Author	To view the hierarchy and dimensions for this folder, see the **Employee** folder in the **Article Real Time Subject Area topic.**	The folder that contains dimensions for employees who created versions of an article. Employees must be assigned the Resource role to be visible in Analytics reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Time	Stat Calendar Month	The calendar month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Month End Date	The calendar month end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Month Start Date	The calendar month start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.

Dimension Folder	Dimension	Definition
	State Calendar Quarter	The calendar quarter of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Quarter End Date	The calendar quarter end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Quarter Start Date	The calendar quarter start date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Year End Date	The calendar year end date of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Calendar Year Start Date	The calendar year start date of the statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates captured.
	Stat Date	The statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates captured.
	Stat Month	The month of the statistics (stat) date. This is the date on which the aggregation job was executed, and ratings and other updates captured.
	Stat Quarter	The quarter of the statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates were captured.
	Stat Year	The year of the statistics (stat) date. This is the date on which the aggregation job was executed and ratings and other updates were captured.

The following table illustrates the facts of historical data:

Fact Folder	Fact	Definition
Article Management	Number of Article Updates	The number of times the article was updated.

Fact Folder	Fact	Definition
	Number of Articles Published	The total number of article published.
Article Ratings	# of Rating 1	The number of times an article was rated 1 star.
	# of Rating 2	The number of times an article was rated 2 stars.
	# of Rating 3	The number of times an article was rated 3 stars.
	# of Rating 4	The number of times an article was rated 4 stars.
	# of Rating 5	The number of times an article was rated 5 stars.
	Average Rating	The average rating for the article.
Article View	# of Article Views	The number of times users viewed the article.
Service Request Links	# of Article Links	The number of times the article was linked to a service request.

Article User Group Real Time Subject Area

You can report on the user groups that are associated with articles in Knowledge Management Analytics to gain additional insight into how users are interacting with secured content.

The Article User Groups subject area contains information about the user groups that are associated with articles. This subject area is structured as many-to one, so you open your core subject area (for example, Article Real Time), and then add this subject area.

Note: Before using this subject area, run the below-mentioned scheduled processes.

- Refresh Denormalized Time Dimension Table for BI
- Knowledge Content Batch Process
- Refresh Service Categories for Reporting

Dimension Folder	Dimension	Definition
Article Version	Answer ID	The unique identifier of the article.

Dimension Folder	Dimension	Definition
		You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Display End Date	The end date after which the article is no longer available for display.
	Article ID	The identifier of the article.
	Article Last Updated Date	The date that the article was last updated.
	Article Latest Version	The latest version of the article.
	Article Locale	The language and region of the article.
	Article Major Version	The major version of an article. The numbering of this version is 1, 2, 3 and so on. You can exclude this dimension from a report but you must include it for the subject area join to work effectively.
	Article Version	The minor version of the article. This version includes minor edits to the major version. The numbering of this version is .1, .2, .3, and so on, for example 1.1, 1.2, 2.1
	Article Publish Date	The date on which the article is published.
	Article Status	The latest article status.
	Article Title	The title of the article.
	Version	The current version of the article.
	Base Locale Code	The code of the locale to which the article belongs.
	Base Locale Description	The description of the base locale.
	Content Type	The type of the content, for example, article or FAQ.
	Creation Date	The date on which the article is added to the repository.

Dimension Folder	Dimension	Definition
	Department Name	The name of the department.
	Original Creation Date	The date on which the article was originally created and imported.
	Published	The article is marked as published
	Version Locale Code	The locale code for the version of the article.
	Version Locale Description	The description of the locale for the version of the article.
Employee	Employee Extension To view the hierarchy and dimensions in this folder see the dimensions in the **Employee** folder in the **Article Real Time Subject Area** topic.	The folder that contains dimensions for employees who owned article versions. Employees must be assigned the Resource role to be visible in reports. For more information on assigning roles, see the **Create Knowledge Roles** chapter in this guide.
Employee- Original Article Author	Original Author First Name	The original article author's first name.
	Original Author Last Name	The original article author's last name.
	Original Author Locale ID	The original article author's locale ID.
	Original Author Login	The original article author's login
Employee- Version Article Author	Version Author First Name	The version article author's first name.
	Version Author Last Name	The version article author's last name.
	Version Author Locale ID	The version article author's locale ID.
	Version Author Login	The version article author's login.
Employee - Version Article Owner	Version Owner First Name	The version article owner's first name.
	Version Owner Last Name	The version article owner's last name.
	Version Owner Locale ID	The version article owner's locale ID.
	Version Owner Login	The version article owner's login.

Dimension Folder	Dimension	Definition
User Group	User Group	The name of the user group associated with the article.

The following table lists the facts in the article user group subject area:

Fact Folder	Fact	Definition
Article User Group Facts	# of Article User Groups	The number of user groups associated with the article.
	# of User Groups	The number of user groups.

Create Personalized Reports

Knowledge managers can create personalized reports using subject areas. You need to identify the dimensions, facts, and filters to generate a report. You can also select two subject areas that share common dimensions to add additional data to your report.

To create a personalized report:

1. From the Navigation menu, click **Tools** and select **Reports and Analysis**.

   The Reports and Analytics page opens.
2. Click **Create**, **Report**.

   The Oracle Business Intelligence home page displays the Create Report wizard.
3. To build the report on a subject area, click **Use Subject Area** and select the appropriate Subject Area from the drop-down list.
4. Click **Next** and select the **Page** and **Layout** options.
5. To create a chart or graph, drag and drop fields from the **Data Source** pane into the layout.

   Note: To add additional subject areas to this report, click Add/Remove icon and select another subject area.
6. Click **View Report** to run and view the report and **Edit Report** to modify the report.
7. Click **Finish** and select the folder destination to enter a **Name** and **Description** for the report and then click **OK**.

   The report is created.

Create Personalized Analyses

Knowledge Managers can create analyses using subject areas. To create an analysis, follow these steps:

1. Click **Tools**, **Reports and Analysis**.

The Reports and Analytics page appears.

2. Click **Create**, **Analysis**.

   The **Select Subject Area** window displays.
3. Select the subject area check box and click **Continue**.

   The **Create Analysis: Select Columns** pane lists all the available columns, facts, and attributes.
4. Expand the subject area and add columns to the analysis and then click **Next**.

   The **Create Analysis: Select View** pane lists the table, graph, and layout options available.
5. Enter a **Title** for the analysis and select the Table, Graph, and Layout options from the drop-down lists.

   > **Note:** You can **Preview** the analysis and edit the table and graph layouts.

6. Click **Next**.

   The **Create Analysis: Sort and Filter** page opens.
7. To filter the report, follow these steps:
   a. Click **Add Sort** and select a column to sort the analysis in a specific order.
   b. Click **Add Filter** and select the column.
   c. Select the **Operator** from the drop-down list and enter the filter **Value**.

      The drill-down for the analysis appears.
   d. Additionally, you can apply conditional highlight formatting to the analysis in the **Create Analysis: Highlighting** page.
8. Enter the **Analysis Name**, **Description**, and select the destination folder where you want to save the analysis.

   > **Note:** Analysis saved in the **Shared Folders** location is visible to all the users. You can save the analysis in **My Folders** location for your personal use.

9. Click **Submit**.

   A **Confirmation** message appears that the analysis is saved successfully.

Search for Reports and Analyses

When you search for analytics, the search results include all prebuilt and personalized dashboards, reports, and analyses.

To locate an analysis or a report:

1. From the Navigation menu, click **Tools** and select **Reports and Analysis**.

   The **Reports and Analytics** page displays.
2. Click the **Hierarchical Selector** icon to filter the folder location.

   The All Folders catalog is selected by default.
3. To filter the search results, select the filter type and enter the name of the report or analysis in the search text field. You can also click **Clear Filter** to reset the filters.
4. Click the **Search** icon.

The search results that match your criteria appears.

5. Click the **star** icon.

   The analytic is added to your favorites list.

Share Analytics

You can share the analytics that you have created with other users as a briefing book. A briefing book consists of dashboard pages, reports and analyses.

To generate a briefing book, you need to select the analytics, add the contents to the book and save it to the BI catalog. You can download the briefing book in PDF or HTML formats and share it with the other users.

To add contents to a briefing book and share it with others, you can use the procedure explained in the Sales and Fusion Service Creating and Administering Analytics guide.

Related Topics