Oracle Fusion Service

How do I get started with Fusion Knowledge Management in the Redwood User Experience?

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2 Implementation Summary

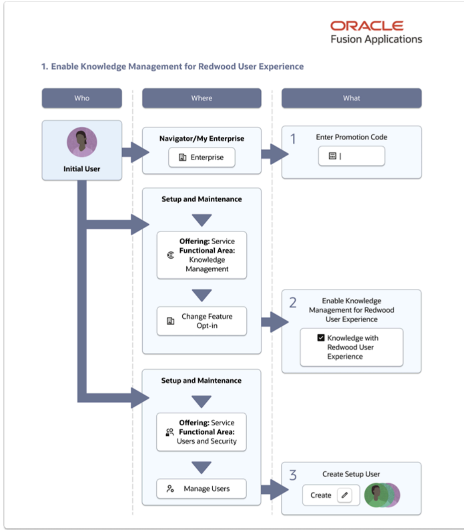
Implementation Overview

You can use this playbook to get started with the implementation of Knowledge Management in Redwood User Experience.

At a high-level, this is what you need to do to implement Knowledge Management:

- Enable Knowledge Management in Redwood User Experience
  - *Get your Cloud Account Details from the Welcome Email*
  - *Enter the Promotion Code*
  - *Enable Knowledge with Redwood User Interface Feature*
  - *Create a Setup User*
- Implement Knowledge Management
  - *Create User Groups*
  - *Create Additional Custom Content Types*
  - *Create a Knowledge Author User*
  - *Create a Customer Service Representative*
  - *Assign Locales to Users*
  - *Schedule Required Knowledge Processes*
- Verify implementation
  - *Verify Your Knowledge Implementation Setup as an Author*
  - *Verify your Knowledge Implementation Setup as a Customer Service Representative*

This flowchart illustrates these implementation steps and provides information on the related roles and UIs.


ORACLE
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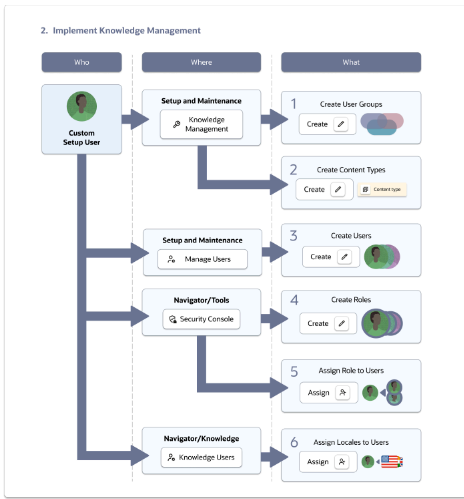
Manage Users
3 Create Setup User
Create


2. Implement Knowledge Management
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3 Create Users
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5 Assign Role to Users
Assign
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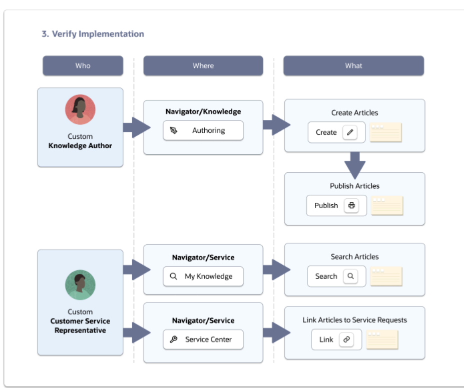
6 Assign Locales to Users
Assign


3. Verify Implementation
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What
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Create Articles
Create
Publish Articles
Publish
Custom Customer Service Representative
Navigator/Service
My Knowledge
Search Articles
Search
Navigator/Service
Service Center
Link Articles to Service Requests
Link

What You Will Be Able to Do After Completing the Setups

After you complete the setups described in this guide, your organization's:

- Setup user should be able to:
  - Create user groups, content types, jobs, roles, and users
  - Assign roles to users
  - Assign locales to author users
  - Schedule knowledge processes
- Authors should be able to:
  - Create articles using custom content types
  - Publish articles to the knowledge base
- Customer service representative should be able to:
  - Use My Knowledge to search for articles
  - Link articles to service requests

Before You Start

You should have subscribed to the service and have received the e-mail with your environment and initial sign-on information.

Case Study

In this playbook, a case study is used to define the scope of the implementation tasks and illustrate their interdependence.

The case study is based on a fictitious company named Vision Corp., a global high-tech company that sells laptop and multiple server product lines to businesses and other organizations. Vision Corp. would like to implement Knowledge Management to create and manage a Knowledge Base of articles.

The company would like its author users to use Knowledge Authoring to create and manage knowledge articles. Vision Corp. agents and self-service users can use knowledge articles to easily find solutions to customer issues. Also, customer service representatives can link articles to customer service requests.

3 Enable Knowledge Management in Redwood User Experience

Get your Cloud Account Details from the Welcome Email

When you subscribe to Knowledge Management with Redwood User Experience, an initial user is created for you. This initial user has the Application Implementation Consultant role, and can enter the promotion code, enable Knowledge, and provide access to Redwood UIs. You get your cloud account details and sign in credentials through a welcome email.

Let's help Vision Corp get started! In this use case, for Vision Corp., Bonnie Vickers is set up as the initial user.

> **Note:** If you don't have the promo code for Knowledge Management with Redwood User Experience, file an SR with Oracle Support.

Enter the Promotion Code

To set the ball rolling, sign-in into your application environment as an initial user such as Bonnie Vickers. Complete these steps to enter the promotion code:

1. Click **Navigator** > **My Enterprise** > **Enterprise**.
2. On the Enterprise Information page, click the **Manage Promotion Codes** link.
3. On the Manage Promotion Codes page, click **Enter Promotion Code**.
4. On the Enter Promotion Code dialog box, enter the promotion code and click **Save and Close**.

The application displays **Knowledge with Redwood User Interface Promotion Code** in the list of promotion codes.

Enable Knowledge with Redwood User Interface Feature

The next task that the initial user needs to perform, is to opt into the offering that enables the Knowledge Management functional area. Signed in as Bonnie Vickers, complete these steps:

1. Click the profile icon on the Home page and select **Setup and Maintenance** under **Administration**.
2. Select **Service** offering from the **Setup** drop-down list.
3. Click the **Change Feature Opt In** link beside the **Functional Areas** heading.
4. Select the **Enable** option for the **Knowledge Management** functional area.
5. Click the pencil icon and select the **Enable** option for the **Knowledge with Redwood User Interface** feature.
6. Click **Done**.

Now, you have access to the Knowledge configuration options.

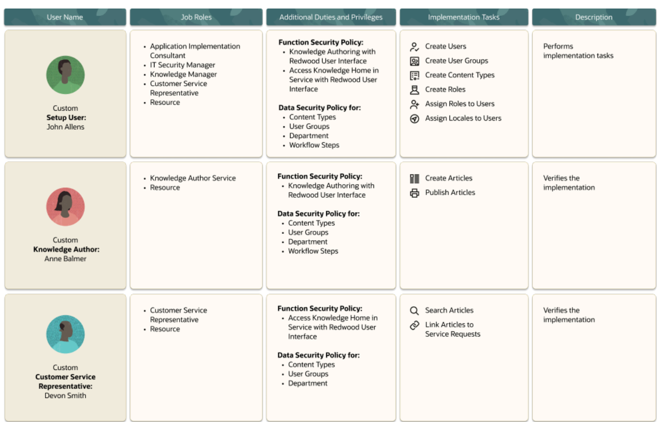
4 Implement Knowledge Management

Create Users

The Initial User does not have all the roles, duties, and privileges required to do the setup mentioned in our case study. So, an initial user such as, Bonnie has to create a couple of custom setup and application users and assign them all the required roles, duties, and privileges:

- Custom Setup user, John Allens: This user does the actual implementation.
- Custom Knowledge Author, Anne Balmer: This user verifies the implementation.
- Custom Customer Service Representative, Devon Smith: This user can use knowledge articles to easily find solutions to customer issues. Also, this user can link articles to service requests.

This diagram describes the setup and application users, roles, duties, and privileges required to do the setup mentioned in the Vision Corp. case study.



Create a Setup User

Unlike the Initial User, the setup user has all the roles, duties, and privileges required to do the setup mentioned in our case study. The setup user performs the actual implementation tasks. Signed in as an initial user, such as Bonnie, you should complete the steps to create a setup user such as John Allens.

- *Create a Job for Provisioning Knowledge Setup Users*
- *Create a Role for Custom Knowledge Setup Users*
- *Create a Role Provisioning Rule for Setup Users*
- *Create the Knowledge Setup User*

Create a Job for Provisioning Knowledge Setup Users

Here's how you can create a job that you can use to assign setup users with implementation privileges. You use this job as a condition in the provisioning rule you create and assign the job to the users.

You can create a job by carrying out the given steps:

1. Sign in as the initial user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service**.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage Job** task.

   The Manage Jobs page appears.
7. Click the **+ Create**

   The Create Job: Basic Details page appears.
8. From the **Job Set** drop-down list, select **Common Set**.
9. In the **Name** field, provide a name for the job. For example, Knowledge Management Setup User Job.
10. In the **Code** field provide a code for the job. For example, KM_Setup_User_Job.
11. Click **Next** until you reach the last step of the wizard.
12. Click **Submit**.

    This warning message appears: The request will be submitted. Do you want to continue?
13. Click **Yes** to continue.

    This confirmation message appears: The request was submitted.
14. Click **OK**.

> **Note:** The job may take a couple of minutes to create. You can use search on the Manage Jobs page to check that the job has been created.

Create a Role for Custom Knowledge Setup Users

The out-of-the box job roles do not have all the capabilities that a knowledge setup user needs to implement Knowledge in the Redwood User Experience. So, apart from associating certain out-of-the-box job roles to the setup user, you also need to provide certain additional duties and privileges. To provide these additional duties and privileges to the setup user, you need to create a custom knowledge setup user role with the required Function Security policies and Data Security policies, using these steps:

1. Sign in as the initial user.
2. Go to **Tools**, and click **Security Console**.
3. On the **Roles** page, click **Create Role**.

   The Create Role wizard appears.
4. On the **Basic Information** page, provide:
   a. A **Role Name**, for example: Knowledge Setup User Role
   b. A **Role Code**, for example: KM_Setup_User_Role
   c. **Role Category** as **Common - Abstract Roles**
5. Click **Next**.
6. On the Function Security Policies page:

   a. Click **Add Function Security Policy**, search for and select **Knowledge Authoring with Redwood User Interface**, and click **Add Privilege to Role**.
   b. Click **Add Function Security Policy**, search for and select **Access Knowledge Home in Service with Redwood User Interface**, and click **Add Privilege to Role**.

7. Click **Next**.
8. On the Data Security Policies page, create the following data security policies:
   - For Content Types:
     i. Click **Create Data Security Policy**.
     ii. Enter a data security **Policy Name** for content type, for example: DSP_Content_Type.
     iii. For **Data Resource**, search for and select “Knowledge Content Types”, and click **OK**.
     iv. Ensure **Data Set** is set to “All values”.
     v. From the **Actions** menu, select all of the following:
        - Clear Checkout Article of a content type
        - Delete Article of a content type
        - Publish Article of a content type
        - Translate Article of a content type
        - Update Article of a content type
        - View Article of a content type
     vi. Click **OK**.
   - For User Groups:
     i. Click **Create Data Security Policy**.
     ii. Enter a data security **Policy Name** for content type, for example: DSP_User_Group.
     iii. For **Data Resource**, search for and select “Knowledge User Groups”, and click **OK**.
     iv. Ensure **Data Set** is set to “All values”.
     v. From the **Actions** menu, select "Access Content with User Group".
     vi. Click **OK**.
   - For Department:
     i. Click **Create Data Security Policy**.
     ii. Enter a data security **Policy Name** for content type, for example: DSP_Department.
     iii. For **Data Resource**, search for and select “Knowledge Departments”, and click **OK**.
     iv. Ensure **Data Set** is set to “All values”.
     v. From the **Actions** menu, select "Access Content with Department".
     vi. Click **OK**.
   - For Workflow Steps:
     i. Click **Create Data Security Policy**.
     ii. Enter a data security **Policy Name** for content type, for example: DSP_Workflow.
     iii. For **Data Resource**, search for and select “Knowledge Workflow Steps”, and click **OK**.
     iv. Ensure **Data Set** is set to “All values”.
     v. From the **Actions** menu, select "Approve or reject a Knowledge Workflow Step".
     vi. Click **OK**.
9. Click **Next** to view the role hierarchy.
10. Click **Next** to view the segregation of duties.
11. Click **Next** to view users.
12. Click **Next** to review the summary.
13. Click **Save and Close**.

You get a confirmation message. For example: Your process 129430 was submitted. Check the status on the Administration tab.

14. Click **OK**.

Create a Role Provisioning Rule for Setup Users

Here's how you can create the provisioning rule which automatically provisions users assigned the "Knowledge Management Setup User Job" with the job roles required to perform the initial setup in this guide.

To create the provisioning rule:

1. Sign in as the initial user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service** offering.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage HCM Role Provisioning Rules** task.

   The Role Mapping page appears.
7. Click the **+** button to create the provisioning rule.

   The Create Role Mapping page appears.
8. In the **Mapping Name** field, provide a name for the role mapping. For example, Knowledge Management Setup User Mapping.
9. In the Conditions region, from the **Job** drop-down list, click **Search**. Search and select the job name you created earlier. For example, Knowledge Management Setup User Job.
10. In the Associated Roles region, add the following job roles:
    - **Application Implementation Consultant** (Role Code: ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB)
    - **IT Security Manager** (Role Code: ORA_FND_IT_SECURITY_MANAGER_JOB)
    - **Knowledge Manger** (Role Code: ORA_CSO_KNOWLEDGE_MANAGER_JOB)
    - **Customer Service Representative** (Role Code: ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB)
    - **Resource** (Role Code: ORA_HZ_RESOURCE_ABSTRACT)
    - **Knowledge Setup User Role** (KM_Setup_User_Role). This is the custom setup role you created earlier to provide additional duties and privileges.

> **Note:** You need to add each of these job roles individually. To add a job role:
>
> a. Click **+**.
>
>   A new row with a blank field for Role Name appears.
>
> b. Type the name of the job role in the blank field.
>
>   A list of job roles appears.
>
> c. Select the required job role.

11. Once you have added all the job roles, click **Save and Close**.

Create the Knowledge Setup User

After you have created the provisioning rule, you're ready to create the setup user.

To create a setup user:

1. Sign in as the initial user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service** offering.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage Users** task.

   The **(Search Person)** page appears.
7. Click **+** to create a new user.

   The Create User page appears.
8. In the Person Details region, provide:
   - **Last Name**: For example, Allens.
   - **First Name**. For example, John.
   - **Email**: A welcome email is sent to this email address with a link to reset the password when you create this user.
9. In the User Details region, provide:
   - **User Name**: This is the account name which the user will use to log in to the application. For example, john_allens.
10. In the Employment Information region, provide:
    - **Person Type**: Select **Employee**.
    - **Legal Employer**: Select the legal employer Oracle created for you. The legal employer name is typically your company name followed by the letters LE.
    - **Business Unit**: Select the business unit Oracle created for you. The business unit name is typically your company name followed by the letters LE BU.
    - **Job:** Search and select the job you created for this user. For example, Knowledge Management Setup User Job.
11. Click **Autoprovision Roles**.

    The Role Requests region displays the following roles:
    - Application Implementation Consultant
    - IT Security Manager
    - Knowledge Manager
    - Customer Service Representative
    - Resource
    - Employee
    - Knowledge Setup User Role
12. Click **Save and Close**.

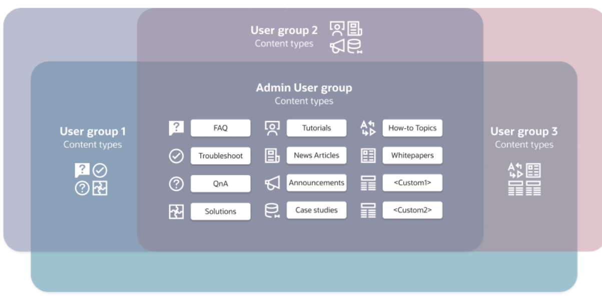
The user creation request may take a few minutes to complete. A welcome email is sent to the user's email address with a link to reset the password.

Congratulations! Your setup user, John Allens is all set to perform the Knowledge implementation activities.

Create User Groups

Knowledge management has user groups that the setup user, such as John Allens, can use to control who can see which articles in the knowledge base. Users assigned to a user group can only access the content targeted for that user group. The predefined user groups help in segregating content that should only be viewed by users within the organization. You can define and implement custom user groups to segment content for additional audiences.

In the given diagram, Admin User group can access all content types. User group 1 can access FAQ, Troubleshoot, QnA, and Solutions content types, User group 2 can access Tutorials, News Articles, Announcements, and Case studies content types, and User group 3 can access How-to-Topics, Whitepapers, and other custom content types.



User groups are associated to data security policies. You can 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.

Signed in as a setup user, such as John, complete the steps to create custom user group:

1. Go to **Setup and Maintenance**.
2. Select the **Service** offering and select **Knowledge Management**.
3. Select the **Manage Knowledge User Groups** task.
4. From the **Department** drop-down list, select **Service**.
5. Click **+** to create a user group.

   The Manage User Groups page appears.
6. For the **User Group Name**, enter a group name of your choice. For example, Vision Service User Group.
7. For the **Reference Key**, retain the autogenerated key or enter a unique key of your choice. For example, VISION_SERVICE_USER_GROUP.

   > **Note:** Make a note of the reference key. You will need to provide this reference key when you define a Data Security Policy for a role.

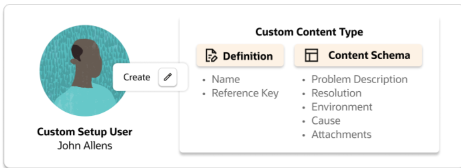
8. Click **Create**.

Create Additional Custom Content Types

Content types define the various types of articles in your knowledge base. When you define content type, it serves as an authoring template for articles that serve a specific purpose.

Out-of-the-box content types may not meet your knowledge base requirements. Therefore, you might want to create additional content types that are customized to your knowledge base requirements.

This diagram shows how the custom setup user, John Allens, can go about creating a custom content type.



To create a content type, you need to:

- *Define the Content Type*
- *Define the Content Schema*

Define the Content Type

Signed in as a setup user, such as John, you can create and define the custom content type by following these steps:

1. Select **Setup and Maintenance**, 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.
4. For the **Content Type Name**, enter a name of your choice. For example, Troubleshooting.
5. For the **Reference Key** retain the autogenerated key or enter a unique key of your choice. For example, TROUBLESHOOTING.

   > **Note:** Make a note of the reference key. You will need to provide this reference key when you define a Data Security Policy for a role.

6. For the **Document ID Prefix**, provide a prefix.For example, TRBL.

   > **Note:** You need to think carefully when choosing a prefix for the content type, as it will be visible to your users in the UI. The application automatically prefixes this prefix ID to the article ID, when an author creates an article of this content type. For example, when an author creates an article of this content type, the article ID will appear like TRBL41.

7. (Optional) Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the available locales.
8. Select **Department** for the content type. For example, Service.
9. Click **Next** to define Content Schema.

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 troubleshooting content type to include fields such as Problem Description, Resolution, Environment, and Cause.

Signed in as the setup user, such as John, do the steps to define the schema for the custom content type:

1. For the **Name**, enter a title. For example, Troubleshooting Title.
2. For the **Reference Key**, provide a unique key of your choice. For example, TROUBLESHOOTING_TITLE.
3. Enter a description for the title field. For example, "Provide a title for your troubleshooting article".

   This is displayed as ghost text when an author creates an article of this content type.
4. (Optional) Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the available locales.
5. Click the **+** sign to add and define the fields for your content type. For example, you can add the following fields for your troubleshooting content type:

Name	Description	Locale	Reference Key	Visibility	Field Type	Required
Problem Description	Provide the problem description	English - United States	PROBLEM_ DESCRIPTION	All	Full Rich Text Area	Yes
Resolution	Provide the resolution to the problem	English - United States	RESOLUTION	All	Full Rich Text Area	Yes
Environment	Provide environment details	English - United States	ENVIRONMENT	All	Full Rich Text Area	No
Cause	Provide the cause for the problem	English - United States	CAUSE	All	Full Rich Text Area	No

6. Each field has the following parameters:
   a. **Name**: Provide the name of the field. This name is displayed as the title of the field when an author creates an article.
   b. **Description**: Provide the description. This description is displayed as ghost text for this field when an author creates an article.
   c. **Locale**: Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the available locales.
   d. **Reference Key**: Provide a unique key.
   e. **Visibility**: Click the visibility icon to restrict this field to specific user groups.
   f. **Field Type**: Select the formatting option for the field. The available options are:
      - Full Rich Text Area: Enables authors to format the content.
      - Text Area: Enables authors to enter the content as plain text.
   g. **Required**: Select this check box to specify that authors must enter content in this field.
7. You can use the up and down arrow buttons change the order of these fields.
8. Select the **Enable File Attachments** check box to allow authors to attach files to the article.
9. Click **Create**.

This creates our custom content type called Troubleshooting.

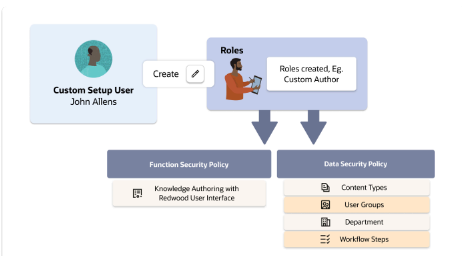
Create a Knowledge Author User

Authors create articles using content types and publish articles to the knowledge base.

As a setup user, you could create a Knowledge author user such as Anne Balmer. Complete the steps to create your author:

- *Create a Job for Provisioning Knowledge Authors*
- *Create a Role for Custom Knowledge Authors*
- *Create a Role Provisioning Rule for Knowledge Authors*
- *Create a Knowledge Author User*

This diagram shows how the custom setup user, John Allens, can go about creating a knowledge author user.



Create a Job for Provisioning Knowledge Authors

Here's how you can create a job that you can use to assign author users with the required privileges. You use this job as a condition in the provisioning rule you create and assign the job to the users.

You can create a job by carrying out the given steps:

1. Sign in as the setup user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service**.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage Job** task.

   The Manage Jobs page appears.
7. Click the **+ Create**

   The Create Job: Basic Details page appears.
8. From the **Job Set** drop-down list, select **Common Set**.
9. In the **Name** field, provide a name for the job. For example, Knowledge Management Author Job.
10. In the **Code** field provide a code for the job. For example, KM_Author_Job.
11. Click **Next** until you reach the last step of the wizard.

12. Click **Submit**.

    This warning message appears: The request will be submitted. Do you want to continue?
13. Click **Yes** to continue.

    This confirmation message appears: The request was submitted.
14. Click **OK**.

> **Note:** The job may take a couple of minutes to create. You can use search on the Manage Jobs page to check that the job has been created.

Create a Role for Custom Knowledge Authors

The out-of-the box authoring role (Knowledge Author Service), does not have all the capabilities that a knowledge author needs to work with Knowledge in the Redwood User Experience. So, apart from associating the out-of-the-box authoring role to the user, you also need to provide certain additional duties and privileges to the user. To provide these additional privileges, you need to create a custom knowledge author role with the required Function Security policies and Data Security policies using these steps:

1. Sign in as the setup user.
2. Go to **Tools**, and click **Security Console**.
3. On the **Roles** page, click **Create Role**.

   The Create Role wizard appears.
4. On the **Basic Information** page, provide:
   a. A **Role Name**, for example: Knowledge Author Role
   b. A **Role Code**, for example: KM_Author_Role
   c. **Role Category** as **Common - Abstract Roles**
5. Click **Next**.
6. On the Function Security Policies page, click **Add Function Security Policy**, search for and select **Knowledge Authoring with Redwood User Interface**, and click **Add Privilege to Role**.
7. Click **Next**.
8. On the Data Security Policies page, create the following data security policies:
   a. For Content Types:
      i. Click **Create Data Security Policy**.
      ii. Enter a data security **Policy Name** for content type, for example: DSP_Content_Type.
      iii. For **Data Resource**, search for and select “Knowledge Content Types”, and click **OK**.
      iv. Ensure **Data Set** is set to “Select by Key”.
      v. Enter the **Reference Key** for the custom content type you created previously. For example: TROUBLESHOOTING.
      vi. From the **Actions** menu, select all of the following:
         - Clear Checkout Article of a content type
         - Delete Article of a content type
         - Publish Article of a content type
         - Translate Article of a content type
         - Update Article of a content type

- View Article of a content type

vii. Click **OK**.

b. For User Groups:
   i. Click **Create Data Security Policy**.
   ii. Enter a data security **Policy Name** for content type, for example: DSP_User_Group.
   iii. For **Data Resource**, search for and select “Knowledge User Groups”, and click **OK**.
   iv. Ensure **Data Set** is set to “Select by Key”.
   v. Enter the **Reference Key** for the user group you created previously. For example: VISION_SERVICE_USER_GROUP.
   vi. From the **Actions** menu, select "Access Content with User Group".
   vii. Click **OK**.
c. For Department:
   i. Click **Create Data Security Policy**.
   ii. Enter a data security **Policy Name** for content type, for example: DSP_Department.
   iii. For **Data Resource**, search for and select “Knowledge Departments”, and click **OK**.
   iv. Ensure **Data Set** is set to “All values”.
   v. From the **Actions** menu, select "Access Content with Department".
   vi. Click **OK**.
d. For Workflow Steps:
   i. Click **Create Data Security Policy**.
   ii. Enter a data security **Policy Name** for content type, for example: DSP_Workflow.
   iii. For **Data Resource**, search for and select “Knowledge Workflow Steps”, and click **OK**.
   iv. Ensure **Data Set** is set to “All values”.
   v. From the **Actions** menu, select "Approve or reject a Knowledge Workflow Step".
   vi. Click **OK**.

9. Click **Next** to view the role hierarchy.
10. Click **Next** to view the segregation of duties.
11. Click **Next** to view users.
12. Click **Next** to review the summary.
13. Click **Save and Close**.

    You get a confirmation message. For example: Your process 129440 was submitted. Check the status on the Administration tab.
14. Click **OK**.

Create a Role Provisioning Rule for Knowledge Authors

Here's how you can create the provisioning rule which automatically provisions users assigned the "Knowledge Management Author User Job" with the job roles required to perform their tasks.

To create the provisioning rule:

1. Sign in as the setup user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service** offering.
4. Under **Functional Areas**, click **Users and Security**.

5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage HCM Role Provisioning Rules** task.

   The Role Mapping page appears.
7. Click the **+** button to create the provisioning rule.

   The Create Role Mapping page appears.
8. In the **Mapping Name** field, provide a name for the role mapping. For example, Knowledge Management Author Mapping.
9. In the Conditions region, from the **Job** drop-down list, click **Search**. Search and select the job name you created earlier. For example, Knowledge Management Author Job.
10. In the Associated Roles region, add the following job roles:
    - **Knowledge Author Service** (Role Code: ORA_CSO_KNOWLEDGE_AUTHOR_SERVICE_JOB)
    - **Resource** (Role Code: ORA_HZ_RESOURCE_ABSTRACT)
    - **Knowledge Author Role** (KM_Author_Role). This is the custom author role you created earlier to provide additional duties and privileges.

    > **Note:** You need to add each of these job roles individually. To add a job role:
    > a. Click **+**.
    >
    >   A new row with a blank field for Role Name appears.
    > b. Type the name of the job role in the blank field.
    >
    >   A list of job roles appears.
    > c. Select the required job role.
11. Once you have added all the job roles, click **Save and Close**.

Create a Knowledge Author User

After you have created the provisioning rule, you're ready to create the author user.

To create an author:

1. Sign in as the setup user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service** offering.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage Users** task.

   The **(Search Person)** page appears.
7. Click **+** to create a new user.

   The Create User page appears.
8. In the Person Details region, provide:
   - **Last Name**: For example, Balmer.

- **First Name**. For example, Anne.
- **Email**: A welcome email is sent to this email address with a link to reset the password when you create this user.

9. In the User Details region, provide:
   - **User Name**: This is the account name which the user will use to log in to the application. For example, anne_balmer.
10. In the Employment Information region, provide:
    - **Person Type**: Select **Employee**.
    - **Legal Employer**: Select the legal employer Oracle created for you. The legal employer name is typically your company name followed by the letters LE.
    - **Business Unit**: Select the business unit Oracle created for you. The business unit name is typically your company name followed by the letters LE BU.
    - **Job:** Search and select the job you created for this user. For example, Knowledge Management Author Job.
11. Click **Autoprovision Roles**.

    The Role Requests region displays the following roles:

    - Knowledge Author Service
    - Resource
    - Employee
    - Knowledge Author Role
12. Click **Save and Close**.

    The user creation request may take a few minutes to complete. A welcome email is sent to the user's email address with a link to reset the password.

Congratulations! Your knowledge author user, Anne Balmer is created. However, Anne can perform the knowledge authoring activities in the Redwood User Experience only after you assign locales to her, which you will doing in the upcoming topics.

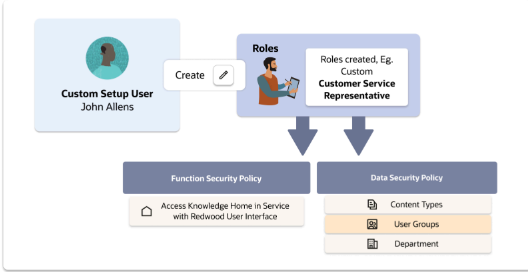
Create a Customer Service Representative

Customers raise service requests when they run into issues. Customer service representatives help customers resolve these issues.

Sign in as a setup user, such as John Allens for Vision Corp. You could create a customer service representative user such as Devon Smith, using these steps:

- *Create a Job for Provisioning Customer Service Representatives*
- *Create a Role for Custom Customer Service Representatives*
- *Create a Role Provisioning Rule for Customer Service Representatives*
- *Create a Customer Service Representative User*

This diagram shows how the custom setup user, John Allens, can go about creating a customer service representative user.



Create a Job for Provisioning Customer Service Representatives

Here's how you can create a job that you can use to assign customer service representative users with the required privileges. You use this job as a condition in the provisioning rule you create and assign the job to the users.

You can create a job by carrying out the given steps:

1. Sign in as the setup user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service**.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage Job** task.

   The Manage Jobs page appears.
7. Click the **+ Create**

   The Create Job: Basic Details page appears.
8. From the **Job Set** drop-down list, select **Common Set**.
9. In the **Name** field, provide a name for the job. For example, Knowledge Management Customer Service Representative Job.
10. In the **Code** field provide a code for the job. For example, KM_CSR_Job.
11. Click **Next** until you reach the last step of the wizard.
12. Click **Submit**.

    This warning message appears: The request will be submitted. Do you want to continue?
13. Click **Yes** to continue.

    This confirmation message appears: The request was submitted.
14. Click **OK**.

> **Note:** The job may take a couple of minutes to create. You can use search on the Manage Jobs page to check that the job has been created.

Create a Role for Custom Customer Service Representatives

The out-of-the box authoring role (Customer Service Representative), does not have all the capabilities that a customer service representative needs to work with Knowledge in the Redwood User Experience. So, apart from associating the out-of-the-box role to the user, you also need to provide certain additional duties and privileges to the user. To provide these additional privileges, you need to create a custom customer service representative role with the required Function Security policies and Data Security policies using these steps:

1. Sign in as the setup user.
2. Go to **Tools**, and click **Security Console**.
3. On the **Roles** page, click **Create Role**.

   The Create Role wizard appears.
4. On the **Basic Information** page, provide:
   a. A **Role Name**, for example: Knowledge Customer Service Representative Role
   b. A **Role Code**, for example: KM_CSR_Role
   c. **Role Category** as **Common - Abstract Roles**
5. Click **Next**.
6. On the Function Security Policies page, click **Add Function Security Policy**, search for and select **Access Knowledge Home in Service with Redwood User Interface**, and click **Add Privilege to Role**.
7. Click **Next**.
8. On the Data Security Policies page, create the following data security policies:
   a. For Content Types:
      i. Click **Create Data Security Policy**.
      ii. Enter a data security **Policy Name** for content type, for example: DSP_Content_Type.
      iii. For **Data Resource**, search for and select “Knowledge Content Types”, and click **OK**.
      iv. Ensure **Data Set** is set to “Select by Key”.
      v. Enter the **Reference Key** for the custom content type you created previously. For example: TROUBLESHOOTING.
      vi. From the **Actions** menu, select the following:
         - View Article of a content type
      vii. Click **OK**.
   b. For User Groups:
      i. Click **Create Data Security Policy**.
      ii. Enter a data security **Policy Name** for content type, for example: DSP_User_Group.
      iii. For **Data Resource**, search for and select “Knowledge User Groups”, and click **OK**.
      iv. Ensure **Data Set** is set to “Select by Key”.
      v. Enter the **Reference Key** for the user group you created previously. For example: VISION_SERVICE_USER_GROUP.
      vi. From the **Actions** menu, select "Access Content with User Group".
      vii. Click **OK**.
   c. For Department:
      i. Click **Create Data Security Policy**.
      ii. Enter a data security **Policy Name** for content type, for example: DSP_Department.
      iii. For **Data Resource**, search for and select “Knowledge Departments”, and click **OK**.
      iv. Ensure **Data Set** is set to “All values”.
      v. From the **Actions** menu, select "Access Content with Department".
      vi. Click **OK**.
9. Click **Next** to view the role hierarchy.
10. Click **Next** to view the segregation of duties.
11. Click **Next** to view users.
12. Click **Next** to review the summary.
13. Click **Save and Close**.

You get a confirmation message. For example: Your process 129450 was submitted. Check the status on the Administration tab.

14. Click **OK**.

Congratulations! Your customer service representative, Devon Smith is all set to perform the customer service representative activities.

Create a Role Provisioning Rule for Customer Service Representatives

Here's how you can create the provisioning rule which automatically provisions users assigned the "Knowledge Management Customer Service Representative Job" with the job roles required to perform their tasks.

To create the provisioning rule:

1. Sign in as the setup user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service** offering.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage HCM Role Provisioning Rules** task.

   The Role Mapping page appears.
7. Click the **+** button to create the provisioning rule.

   The Create Role Mapping page appears.
8. In the **Mapping Name** field, provide a name for the role mapping. For example, Customer Service Representative Mapping.
9. In the Conditions region, from the **Job** drop-down list, click **Search**. Search and select the job name you created earlier. For example, Knowledge Management Customer Service Representative Job.
10. In the Associated Roles region, add the following job roles:
    - **Customer Service Representative** (Role Code: ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB)
    - **Resource** (Role Code: ORA_HZ_RESOURCE_ABSTRACT)
    - **Knowledge Customer Service Representative Role** (KM_CSR_Role). This is the custom customer service representative role you created earlier to provide additional duties and privileges.

> **Note:** You need to add each of these job roles individually. To add a job role:
> a. Click **+**.
>
>   A new row with a blank field for Role Name appears.
> b. Type the name of the job role in the blank field.
>
>   A list of job roles appears.
> c. Select the required job role.

11. Once you have added all the job roles, click **Save and Close**.

Create a Customer Service Representative User

After you have created the provisioning rule, you're ready to create the customer service representative user.

To create a customer service representative:

1. Sign in as the setup user.
2. Click the profile icon, and then click **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the **Service** offering.
4. Under **Functional Areas**, click **Users and Security**.
5. From the **Show** drop-down list, select **All Tasks**.
6. Click the **Manage Users** task.

   The **(Search Person)** page appears.
7. Click **+** to create a new user.

   The Create User page appears.
8. In the Person Details region, provide:
   - **Last Name**: For example, Smith.
   - **First Name**. For example, Devon.
   - **Email**: A welcome email is sent to this email address with a link to reset the password when you create this user.
9. In the User Details region, provide:
   - **User Name**: This is the account name which the user will use to log in to the application. For example, devon_smith.
10. In the Employment Information region, provide:
    - **Person Type**: Select **Employee**.
    - **Legal Employer**: Select the legal employer Oracle created for you. The legal employer name is typically your company name followed by the letters LE.
    - **Business Unit**: Select the business unit Oracle created for you. The business unit name is typically your company name followed by the letters LE BU.
    - **Job:** Search and select the job you created for this user. For example, Knowledge Management Customer Service Representative Job.
11. Click **Autoprovision Roles**.

    The Role Requests region displays the following roles:

    - Customer Service Representative
    - Resource
    - Employee
    - Knowledge Customer Service Representative Role
12. Click **Save and Close**.

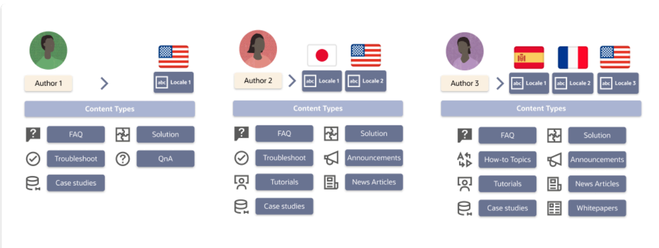
    The user creation request may take a few minutes to complete. A welcome email is sent to the user's email address with a link to reset the password.

Congratulations! Your customer service representative user, Devon Smith is all set to perform the customer service representative activities.

Assign Locales to Users

Locales help you to differentiate knowledge content by language, 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.

You must assign at least one locale to every author user so that they can work in Knowledge Authoring. These users can create and manage articles only in the locales assigned to them. You can also assign multiple locales to a user. For example, in the given diagram, Author 1 has English locale assigned, Author 2 has Japanese and English locales assigned, and Author 3 has Spanish, French, and English locales assigned.



Signed in as a setup user, such as John, assign locales to a knowledge author, such as Anne, you had created. Here are the steps for how you can do it:

1. Sign in as the setup user.
2. From the springboard, select **Knowledge > Knowledge Users**.
3. Search and select the knowledge author user. For example - anne_balmer.
4. Select the locales that you want to add and click the arrow icons to move the locales from **Available Locales** to **Selected Locales**.

   You can select multiple locales in a single operation, or select all of the locales using the double arrow.
5. Click **Save**.

Congratulations! Anne is all setup perform the knowledge authoring activities in the Redwood User Experience.

Similarly, assign locales to our setup user, John, using the above steps.

5 Schedule Knowledge Processes

Overview of Scheduled Processes

We have done a lot of setup by now. We now need to make sure that the latest data is available to all the knowledge users by scheduling and running a couple of knowledge processes. Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends.

You must schedule the following knowledge processes, so that latest data is available to all the Knowledge users:

- **Knowledge Content Batch Process**: This job updates Knowledge categories and products to reflect recent changes to Service and HCM products and categories. Schedule this job to run only once per day. Running this job more frequently is not recommended.
- **Knowledge Search Batch Process**: This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes.

For more information, see:

- *Best Practices for Scheduled Processes*
- *Understanding Scheduled Processes*

Schedule Required Knowledge Processes

Complete these steps to schedule the required Knowledge processes so that latest application setup data is available to all the Knowledge users:

1. Log in as a setup user, such as John Allens.
2. Go to **Tools**, and click **Scheduled Processes**.
3. Click **Schedule New Process**.
4. In the Schedule New Process dialog box, select **Job** as the process type.
5. In the **Name** field, type "Knowledge", and press Enter.

   This displays the list of available Knowledge processes.
6. Select the process you want to schedule and click **OK**. You need to repeat the steps for each of the following processes:
   - Knowledge Content Batch Process
   - Knowledge Search Batch Process
7. Click **OK** in the Schedule New Process dialog box to go to the Process Details page for the job.
8. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
9. Click **Advanced** and for **Run** select **Using a schedule**.
   - For the Knowledge Content Batch Process, set the following:
     - **Frequency**: Daily

        - **Days Between Runs**: 1
        - **Start Date**
        - **End Date**
    - For the Knowledge Search Batch Process, set the following:
        - **Frequency**: Hourly/Minute
        - **Time Between Runs**: Hours 0 Minutes 15
        - **Start Date**
        - **End Date**

10. Click **Submit**.

> **Note:** Recently published articles will be available for searching for customer service representative in Service Center only after the "Knowledge Search Batch Process" job has completed running successfully.

6 Verify your Knowledge Implementation Setup

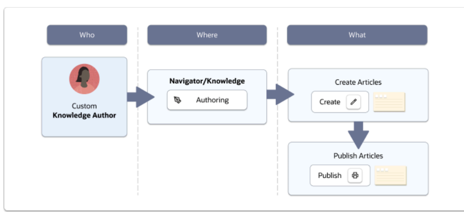
Verify Your Knowledge Implementation Setup as an Author

It's now time to verify your implmentation of knowledge as an author.

As an author, you should now be able to:

1. *Create an Article*
2. *Publish an Article*

This flowchart shows how a knowledge author navigates to Authoring, and creates and publishes an article.



Create an Article

As the Knowledge author such as Anne, you can do these steps to create an article:

1. From the Springboard, select **Knowledge > Authoring.**
2. Click **Create Article**.

   You should be able to see the list of available content types including the custom content types. For example, John has created a custom content type named Troubleshooting.

   > **Note:** Sometimes, you may not see a list of content types, if you have recently created the knowledge author user. In such case, please try again after some time.

3. Select the custom content type. For example, Troubleshooting.

   The New Article page appears.
4. Provide the article content in the respective fields. For example:
   - Troubleshooting Title: How do I change the delivery date for the laptop I have ordered?
   - Problem Description: When you place an order, the system automatically sets the delivery date based on the availability of the product and the shipping time. However, you can change the delivery date based on you requirement.
   - Resolution: To postpone the delivery date, just change the date in the Delivery Date field on the Manage Orders page. To prepone the delivery date, select the Express Delivery checkbox and provide the Express Delivery Date. Please note that selecting the Express Delivery option might incur additional charges.

5. For the **Start Date**, select a date and time in the future.
6. For **User Groups**, search and select the required user group. For example, Vision Service User Group.
7. Click **Create**.

Publish an Article

Signed in as the Knowledge author, you can complete these steps to publish an article:

1. From the Springboard, select **Knowledge > Authoring.**
2. Search and click the article you want to publish. For example, "How do I change the delivery date for the laptop I have ordered?"
3. From the Actions menu, select one of the following:
   - **Schedule Publication**: This option appears if the start date of the article is in the future.

     A message appears mentioning that the article will go live on the start date, and the status of the article changes from Draft to Scheduled. The article gets published at the date and time specified in the start date.
   - **Publish**: This option appears if the start date of the article is in the past.

     A message appears mentioning that the article is now published, and the status of the article changes from Draft to Live.

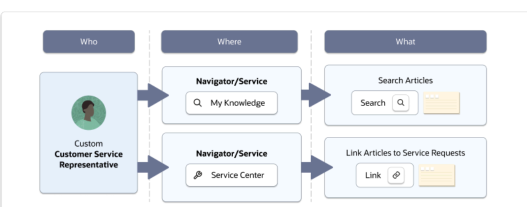
Verify your Knowledge Implementation Setup as a Customer Service Representative

It's now time to verify your implmentation of knowledge as a customer service representative.

As a customer service representative, you should be able to:

- *Search Articles*
- *Link Articles to Service Requests*

This flowchart shows how a customer service representative navigates to search articles and link articles to service requests.



Search Articles

Customer service representatives can see only those articles which are created in their Knowledge locale.

To see your Knowledge locale, follow these steps:

1. Log in as a customer service representative, such as Devon Smith.
2. Click the profile icon, and click **Set Preferences**.
3. Under **Knowledge**, click **Preferred Knowledge Locale**.

   If the value is 'None', then the default Knowledge locale set for all users is used for this user.

In order to search for an article in My Knowledge, Devon follows these steps:

1. From the Springboard, select **Service > My Knowledge.** A list of knowledge articles appears.
2. Search for a knowledge article. For example you can search for "How do I change the delivery date for the laptop I have ordered?", an article created by Anne Balmer.
3. In the search results, click the required article to view the article.

Link Articles to Service Requests

While working on service requests, as the customer service representative, you can also link an article to a service request, which can be helpful to the customers in resolving their issues.

Here's how Devon links an article to a service request:

1. From the Springboard, select **Service** > **Service Center**.
2. On the My Open Service Requests page, search for a service request.
3. Click the reference number of the service request you want to view.
4. In the search field, search for the required knowledge article, by typing "Search Knowledge <article_name>".

   For example, "Search Knowledge How do I change the delivery date for the laptop I have ordered?"

   The search results open in a new browser window.
5. In the search results, click the link icon in the row containing the required article, to link the article to the service request.

   This links the article to the service request.

To verify that the article is linked to the service request:

1. From the Springboard, select **Service** > **Service Center**.
2. On the My Open Service Requests page, search for the required service request.
3. In the search results, click the reference number for the service request you want to view.
4. Click in the search field and select **Show Linked Content**.

   This lists all the articles linked with this service request.

7 Congratulations

Congratulations

Congratulations! You have successfully implemented and verified the knowledge implementation.