Oracle Fusion Service

Using Knowledge Management in the Redwood User Experience

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Get Help

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

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

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.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

2 About This Guide

Audience and Scope

This guide is intended for authors, agents, and self-service users working with knowledge management features and components.

To set up and work with the additional features of Oracle Fusion Cloud Sales Automation and Fusion Service, see the product documentation on *Oracle Help Center*. To set up and work with additional features of Oracle Fusion Cloud Human Resources, see the product documentation on *Oracle Help Center*.

Related Guides

You can refer to the following related guides to understand more about the user tasks covered in this guide. All of these guides are on *Oracle Help Center*.

Title	Description
Oracle Fusion Service Implementing Knowledge Management with the Redwood User Experience	Describes how to set up Knowledge Management components and features.
Oracle Fusion Service Administering Knowledge Management	Describes how administrators can perform ongoing knowledge management operations and maintenance tasks.
Oracle Fusion Service Using Knowledge Management	Describes how to use knowledge management components and features.
Oracle Fusion Service Implementing Service Center	Describes how to set up service components and features.
Oracle Fusion Cloud Sales Automation Implementing Sales	Describes how to set up and configure sales components and features.
Oracle Fusion Service Using Service Center	Describes how to use service components and features.
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.
Oracle Fusion Cloud Sales Automation 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 Application Cloud.

3 Create Articles

Overview of Knowledge Authoring

You can use Knowledge Authoring to create and manage knowledge articles. As an author, you can create and publish articles, periodically update them, translate them into supported locales, and unpublish them when they are no longer needed. Agents and self-service users can use knowledge articles to easily find solutions to customer issues and agents can link articles to customer incidents. To access Authoring, select Next Gen Authoring in the Navigator panel.

Overview of Knowledge Articles

Articles are the basic units of the knowledge base. You can create and manage various predefined types of articles, and your administrator or knowledge manager can define other types of articles specifically for your organization.

You can create these kinds of articles:

- FAQ
- HCM FAQ
- Solution
- HCM Solution
- Content types your organization defines

Articles and their translated versions share the document ID. You can select an article to view details about its publishing status, relevant products and categories, user rating, and other information.

How You Create Articles

Create an article by selecting the content type, adding required and optional content to the fields, attaching files if you need to, and adding the products, categories, and which users can see the article.

1. Click Create Article on the Authoring page.
2. Choose the content type.
3. Enter the required and optional content for the article.
4. Add categories, products, and the user groups who can access it.
5. Schedule publication dates, if needed.
6. Attach files to the article, if needed.
7. Add optional comments or notes.

Choose the Article Content Type

You can choose the type of article that you want to create by its content type. The content type is a template that contains defined required and optional fields that you use to write the article. The content types that are available to you depend on the applications that your organization supports and that you have privileges in.

Select one of the following content types for an article:

- FAQ
- Solution
- HCM-FAQ
- HCM-Solution
- Content types that are created specifically for your organization, if they are available

Title Your Article

Your customers want to have a productive experience when they search for answers, starting with strong, relevant document titles. A poor title can obscure vital information. As a result, your customers may not find the information they seek. A strong article title identifies a topic and provides insight about the content.

Provide Article Content

Your article content varies depending on what content type you selected for the article. For example, if you chose FAQ, you need to enter a question and an answer. For a Solution, you need to enter a summary of the article and the body of the article. You have a variety of tools available to help format the text, insert images, or add a URL.

We understand that things can happen that are beyond your control that may cause you to close an article without saving your changes. To assist your recovery after a system crash or a power outage, the application saves a temporary copy of your article frequently as you type. This assures that when something unexpected does happen, your lost content is minimal.

Add Categories to Articles

You can associate categories to articles so that users can easily find articles that are relevant to the subject of their questions by filtering search results and browse lists. Categories are any characteristic or subject that is relevant to your business and the article's subject matter. For example, billing and warranty are categories of information that can help users answer specific types of questions. Administrators set up the categories you can choose. You can add multiple categories to an article.

1. Click in Select category.

   The category menu shows the most recent categories you have used. You can start typing a category name to search for a category.
2. Select the category.

Add Products to Articles

You can associate products to articles so that users can easily find articles related to specific products by filtering search results and browse lists. Administrators set up the products you can choose. You can add multiple products to an article.

1. Click in Select product.

   The product menu shows the most recent products you have used. You can start typing a product name to search for a product.
2. Select the product.

Add User Groups to an Article

You must associate one or more user groups to the article to determine who can view the published article. You can select one of the user groups that come with the application or the ones defined by your administrator.

The application comes with these user groups:

- Internal Service
- Internal HCM
- Internal Help Desk
- Everyone
- Employee

You can add HCM user groups if you are a HCM author, and Service user groups if you are a Service author. The user group Everyone is available to all authors.

1. Click in Select user group.

   The user group menu shows the most recent user groups you have used. You can start typing a user group name to search for a user group.
2. Select the user group(s).

Note: You must add at least one user group to an 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.

Attach Files to Articles

You can attach files to an article so that agents and self-service users can access their contents to answer questions.

For example, you might want users to be able to read a product manual, a data sheet, or even watch a video to answer their questions. You can attach most common file types, such as PDF, AVI, FLV, MP4, and so on. You can attach up to 20 files to an article, but the total size of the combined attachments can't exceed 100 MB. Administrators define which content types allow attachments and set the types of files that you can attach.

To attach a file, you can drag and drop a file or, click **+** in the attachments section, browse to the file, and click **Open**.

Create an Article from a Service Request

You can create an article using the content of a service request, provided your Knowledge administrator has created an Action for this functionality.

Use this procedure to create an article from a service request:

1. Navigate to the Service Center page.
2. Open the service request from which you want to create an article.
3. In the search box, type Add Action and select <actionName>, where <actionName> is the name of the action created by your administrator to create an article from a service request.

   You get a confirmation that the action is saved, and a Next Action box appears under the search box.
4. In the Next Action box, click **Create Article**.

   The content from the service request is populated in a draft article.
5. Make updates to the article as required.
6. Click **Create**.

Insert Reusable Articles in an Article

Reusable articles are a special type of article, which can be inserted into other articles. With reusable articles, you can create content once and use it in multiple articles, allowing you to maintain the content in the reusable article in one place.

For example, many organizations have a yearly copyright statement that is included in the text of all their articles. By creating a reusable article that can be updated yearly when only part of that statement, such as copyright year, needs to be changed, your author can save time.

> **Note:** A reusable article can only be inserted in standalone articles.

This topic explains how to:

- *Create Reusable Articles*
- *Insert Reusable Articles*
- *Find Articles Containing a Reusable Article*

Create Reusable Articles

To create a reusable article:

1. Navigate to the article list page.
2. Click **Create Article** and scroll to search for the reusable article content type for your department. For example, Reusable Service Article.

   The application opens the editor to create a new reusable article.
3. In the **Name** field, type the name of the reusable article.

> **Note:** This name will not appear anywhere in a published article containing the reusable article.

4. In the **Replacement text** field, enter the content which you will be inserting in other articles.
5. Click **Create**.

   The reusable article is created in Draft state. Once you have finished editing your reusable article, you will need to publish it, so that it is available to end users.
6. From the actions menu, click **Publish**.

   The reusable article is now in Live status.

   > **Note:** If you unpublish (change status from Live to Draft) a reusable article, articles containing the reusable article will not display the content of the reusable article. However, the content of the containing article will still be displayed.

Insert Reusable Articles

To insert a reusable article in an article:

1. Navigate to the article list page.
2. Open the article in which you want to insert the reusable article.
3. Click **Edit**.
4. Click in the field where you want to insert the reusable article.
5. Click on the **+** icon, and click **Reusable Article**.

   The page displays the list of all the reusable articles available to you.
6. Search for the reusable article you want to insert and click on it.
7. Click **Insert Reusable Article**.

   You can see the reusable article inserted as a dotted rectangular box in your article. The box contains the state, name, ID, and content of the reusable article.
8. Click **Save**.

> **Note:** If the reusable article in not published to Live status, the content of the reusable article will not appear in your article.

Find Articles Containing a Reusable Article

To find the list of articles containing a reusable article:

1. Navigate to the article list page.
2. Click in the search pane and choose the **Contains Reusable Article** filter.

   A text box appears, requesting additional details.
3. Type the ID of the reusable article in the text box, and press Enter.

   This lists all the articles which contain the reusable article for which you searched.

Insert Dynamic Links in an Article

You can insert dynamic links inline within the content of an article, provided your Knowledge administrator has defined a dynamic link type.

For example, your administrator has created a dynamic link type, which has the following pattern:

http://mysite.content.com/page/<ID>, where <ID> is the value which you will provide to create a dynamic link.

If you provide a value of 12 for <ID>, then the following dynamic link is created:

http://mysite.content.com/page/12

Use this procedure to insert a dynamic link in an article:

1. Open the article.
2. Click **Edit**.
3. Click within the article where you want to insert a dynamic link.
4. Click on the three vertical dots icon on the editing toolbar to show more items.
5. Click on the **+** icon, and click **Link**.
6. In the Add a Link window, do the following:
    a. Select the link type for the dynamic link.
    b. Enter a value for the ID. Here, ID is the value that you want to use in your link.
    c. Enter the display text. This is the text which a user can click to open the link.
    d. Click **Add**.

    The display text of the link appears in your article.
7. (Optional) Click on the dynamic link and select the desired option to open the link in a new tab, edit the link, or remove the link from the display text.
8. Click **Save**.

Insert an Interview in an Article

Authors can add interviews when they create or edit articles, provided Oracle Intelligent Advisor is integrated with Knowledge. When authors or reviewers open the article in the authoring application, they can see the interview just as self-service users can. 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.

For more information about Intelligent Advisor, see *Intelligent Advisor documentation*.

Use this procedure to insert an interview in your article:

1. Navigate to Authoring.
2. Open the article in which you want to insert an interview.
3. Click **Edit**.
4. Click within the article where you want to insert an interview.
5. Click on the three vertical dots icon on the editing toolbar to show more items.

6. Click on the **+** icon, and click **Interview**.
7. Select the interview which you want to add.
8. Select the required interview locale.
9. Click **Add**.

   You can see a placeholder of the interview added in your article. However, you can't see the actual content of the interview while you are editing the article.
10. Click **Save**.

    The content of the interview appears in the article.

Change URL Link Target Behavior

URL links in the articles can open in the same tab or a new tab. If you want, you can change the existing URL link behavior. By default, the URL links open in a new tab.

To change the URL link behavior:

1. Edit the article.
2. Click **Enable source editing** icon to edit the content.

   > **Note:** You need to have the required privileges to access this icon.
3. Locate the `href` tag of the URL link you want to edit.
4. Edit the value of the target attribute in the source for the URL link as desired:
   - To open the link in the same tab, set `target="_self"`

     For example: Oracle
   - To open the link in a new tab, set `target="_blank"`

     For example: Oracle
5. Save the article.

4 Manage Articles

Use Filters to Narrow Down Articles

You can filter articles using the built-in smart filters. You can also combine multiple filters to narrow down your results.

For example, you can use smart filters based on article status, content type, creation date, expiration date, locale, user groups, workflow, and so on.

To filter articles using smart filters:

1. Navigate to the articles page.
2. Click in the Search articles area.
   This shows a drop-down with the available filters.
3. Scroll through the filters and click on the required filter.
4. Depending on the selected filter, you may need to provide additional information.
5. Click outside the filter area.
   This lists the articles matching your criteria.

Edit Articles

You can update the content and metadata fields of an article as needed. If an article has been rated by users, you can see the average rating when you open the article for viewing.

When you hover over the ratings area, you will see details about the rating.

1. Open an article and click **Edit**.
2. Edit the article content, attachments, and properties as required.
3. (Optional) Click the "Reason for Edit" icon on the top-right of the page and enter your comments to record the changes you made.
4. Click **Save**.

Publish and Unpublish Articles

Publish articles to make them available to users. You can publish articles when you save them, or publish a saved draft from the article list page.

To publish an article, select Publish from the Actions menu.

Unpublishing articles removes them from search and browse lists, so that they are no longer available to agents and self-service users. Authors can access unpublished articles and their histories in the authoring environment.

To unpublish an article, select Unpublish from the Actions menu.

Note: You don't need to take any action to unpublish an article that has an expiration date. The application automatically unpublishes those articles.

Schedule the Publish, Review, and Expiration Dates

You can set a date for an article to go live (publish) on your customer site and a date to expire when you create or edit an article.

Some information is valid or important to users only for a limited time. Setting a date for an article to be published assures that information is available to your customers when they need it. Likewise, setting an expiration date is a convenient way to set an automatic time limit for an article. The application automatically unpublishes articles when they reach their expiration dates, and agents and self-service users can no longer access them. Authors can still access them in the authoring environment.

You can also schedule dates for an article to be reviewed. Some articles may contain information that needs to be reviewed periodically to make certain it remains valid. As you create or edit articles, you can assign a future review date. As the date approaches, the application notifies the necessary users about the upcoming review.

Manage Article Statuses

You assign a status to an article using the Status drop-down menu. Article status options are defined by your organization's administrator. You can search and filter by article status to find articles.

Recover Autosaved Articles

While editing an article, if there is a system outage or if by mistake the browser is closed, without saving the changes, all the updates made to the articles gets saved as draft in the background. Next time when you open the article for editing, the application prompts you to review or discard the autosaved draft content.

To locate and recover an autosaved article:

1. Navigate to the article list page.
2. Click **Autosave Show Drafts**.

   This lists all the autosaved drafts.
3. Locate the article you want to recover.
4. Click the Actions menu for the article, and click **Review**.

   The autosaved draft of the article opens in editing mode.
5. Click **Save** to keep the autosaved draft content, else click **Discard** to delete the changes made.

   Note: If you want to keep the autosaved draft content and make additional changes, you can continue making updates to the article and then click **Save**.

Check Out and Check In Articles

You can check out and lock articles while you edit them to prevent other authors from editing them at the same time. Only one person can check out an article at a time.

When you check out an article, you can update, publish, or perform any other operation your role allows. Users who have the privilege to clear check-outs can check in articles that are checked out by other authors.

> **Note:** Checking out articles is optional. If you edit an article without checking it out, the application locks the article so that other authors cannot accidentally overwrite your changes or create conflicts.

To check out an article, open the article, and from the Actions menu, select **Check Out**.

To check it back in, select **Check In** from the Actions menu.

Comment on an Article While Editing

You can provide the reason for editing an article to keep track of the changes you make to an article. These comments are visible only to authors.

1. Open an article and click **Edit**.
2. Click the "Reason for Edit" icon on the top-right of the page and enter your comments.
3. Make any other changes to the article and click **Save**.

Authors can see the "Reason for Edit" icon for an article version, if a comment was provided for that article version.

Change an Article's Owner

Make another author the owner of an article.

1. Open the article and open the slider by clicking the Restore Pane arrow.
2. Select **Change Owner**.
3. Search for the new owner and click **Change Owner**.

Overview of Article Versions

Knowledge Management assigns version numbers to articles as major and minor values, separated by a decimal point.

When you create and save an article, it is assigned an initial version of 0.1. Each subsequent update to an article results in a minor version increment, for example, 0.1 to 0.2, until the article is published. When an article is published, the version number increments to the next whole number. The first time an article is published, the version number is 1.0.

For example, when you create an article, it automatically becomes version 0.1. The first revision made to the article results in version 0.2 when the article is saved. Make two more revisions, saving after each revision and the version number is 0.4. Open version 0.4 and then publish the article. The article version number is 1.0 and the application lists versions 0.1, 0.2, 0.3, 0.4, and 1.0. If you make additional revisions and then save but don't publish, the article version number becomes 1.1 and increments by 0.1 for each subsequent version until it is published again and then that becomes version 2.0.

Note: When you make the following changes to an article's properties, the version number does not increment:

- Changing the owner
- Changing the review date, either as part of the review process or simply rescheduling the review
- Changing the article status

When you translate an article, the initial translated version is designated as minor version 0.1, regardless of the version number of the master (original) article. You can edit the new localized version within that locale without affecting any version of the original article. The localized article uses the same version numbering, independent of the original article. For example, you have an article at version 0.5 when you initially translate the article. The original article version remains 0.5 and the translated article version is 0.1. Subsequent edits to the translated article will increment as minor versions until it is published.

Compare Article Versions

You can compare different versions of an article by opening the article and selecting Compare from the **Actions** menu.

1. Open the article, and select **History**.

   This shows all versions of an article. Use the drop-down menu to filter this list by, for example, published versions only.
2. Select two article versions that you want to compare.
3. Click **Compare**.

View Article Ratings

Agents and customers can rate articles in SRs and My knowledge using a 5-star and binary rating scale. You can view article ratings within the article. This helps you to determine the health and usefulness of an article. Overall, ratings help you determine what customers like in your knowledge base and where to focus your attention within the knowledge base.

Translate Articles

You can translate articles to make them available in other languages. You can translate an article to any language that is supported in the knowledge base, as long as you have privileges to work in that locale. You translate an article by selecting the new article's locale, supplying the content for the new article, and editing the new article's properties as needed.

When you translate an article, the translation becomes a new article, designated as version 0.1. The knowledge base maintains a relationship between the original article and the new translated version. Articles and their translated versions share the same document ID.

1. Open the article, and select **Translate** from the Action menu.
2. Select the locale that you want to translate to, and click **Next**.
3. Enter the translated content in the new article template. You can select **Copy Content from Source** to copy the contents of the original article into the translation.

   > **Note:** If you copy content from the source, the attachments in the source are also copied. You may want to change the attachments to suit the translated document.

4. Click **Next** and edit the article properties as needed. You can copy the properties from the source article.
5. Optionally, click **Add a comment** to describe the changes you made, or to add any other information.
6. Click **Create** to complete the translation.

Manage Article Suggestions

When responding to service requests, agents search for existing knowledge articles, which they can share with customers. When viewing an article, an agent may notice that the content of the article needs to be updated. Agents can then provide this information as feedback to the owner of the article through Suggestions.

When an agent makes a suggestion, the owner of the article receives a notification. The owner can review the suggestion and can accept or reject it.

Make Article Suggestions

When you make a suggestion on an article, a new task of type Article Suggestion is created, and it is assigned to the owner of the article.

Use this procedure to make a suggestion on an article:

1. Navigate to the Service Center page.
2. Open a service request.
3. Search for an article by typing "search knowledge <keyword>", where <keyword> is the word you are searching for.
4. Click on the required knowledge article.
5. Click the "Suggest a change" icon.
6. In the Suggest a Change pane, do the following:
   - Enter your comments describing how this article can be improved.
   - (Optional) Attach any files, such as an image, related to your suggestion.
   - (Optional) Provide any URLs related to your suggestion.
7. Click **Submit**.

   You get a confirmation message that the suggestion has been submitted.

View Article Suggestions

As an author, you can view suggestions made on knowledge articles. If you don't have permission to edit the article, you can view the suggestion as read-only.

Use the following procedure to view suggestions on knowledge articles:

1. Navigate to the Knowledge Tasks page.
2. Click on the article having the task type as Article Suggestion.

   The article opens with the Suggestion pane on the right, which shows the date of the suggestion, the article version on which the suggestion was made, and the description of the suggestion.

Process Article Suggestions

If you have permissions to edit a knowledge article, you can manage the suggestions made on that article. For example, you can reject a suggestion if you think that it is irrelevant.

Use the following procedure to manage the suggestions on an article:

1. Navigate to the Knowledge Tasks page.
2. Click on the article having the task type as Article Suggestion.

   The article opens with the Suggestion pane on the right, which shows the date of the suggestion, the article version on which the suggestion was made, and the description of the suggestion.
3. Click **Edit** if you want to incorporate the suggestion made on the article.
4. Make the required changes to the article and click **Save**.
5. (Optional) Select the **Outcome** as either **Approved** or **Rejected**.

   This does not affect the task from a technical perspective. It allows you to better organize your tasks and keep a record of what work was done. For example, if you mark the outcome as 'Approved', you can later use the 'Outcome' filter on the Knowledge Tasks page search to see how many suggestion tasks have been approved.
6. (Optional) Select the appropriate status indicating your progress.
7. (Optional) Add notes to the suggestion. These notes can be used by any author to understand the lifecycle of this article.

Once the updated article is ready, you can republish the article. If your article needs to be reviewed or approved before being republished, see *Start a Workflow*.

Modify Articles with Mass Update

You can perform administrative updates on multiple articles by creating a mass update job. For example, you can find all articles having a specific owner and change the owner of those articles.

You can perform the following tasks using mass update:

- Publish all selected articles
- Unpublish all selected articles
- Change the owner of all selected articles
- Change the start date for all selected articles
- Change the expiration date for all selected articles
- Change the review date for all selected articles

Mass Update Articles

To perform a mass update, you use the article search functionality to search for a list of articles, select the articles which you need to update, provide details about what needs to be updated, and schedule the mass update job.

In this example, we are going to change the owner for all articles owned by Jane Doe to Sandra Roberts and update the expiry date for those articles. To do this, use the following procedure.

1. Navigate to the article list page.
2. Search for all articles owned by Jane Doe.
3. Select all the articles owned by Jane Doe.

   The Update icon shows the number of articles you have selected.
4. Click the Update icon.
5. Select the article attributes which you want to update. For this example, click **Other updates** and select **Owner** and **Expiration Date**.
6. Search for and select Sandra Roberts in the **Search by Name** field.
7. Click **Continue**.
8. Specify the date in the **Expiration Date** field.
9. Click **Continue**.

   The Review and Submit page provides you with a summary of the mass update job.
10. (Optional) Schedule the date and time when you want your mass update job to run.

    If you do not provide a date and time, the job will run immediately when you submit it.
11. (Optional) Enter the reason for the update.

    This reason will appear in the history of each article updated by this job.
12. Enable the **Update the latest version of each article selected** option if you want to ensure that the latest version of the articles is updated.

    For example, if you searched for live articles, your search results will show you the version of an article that is live, but it may not be the latest version of the article.
13. Enable the **Maintain article state after update** option if you want to ensure that each article retains its existing state after it is updated.

    For example, if this job updates an article which is live, a new version of the article is created, which is still in unpublished state. Selecting this option ensures that the updated version of the article is republished.
14. Click **Submit**.

    An update confirmation is displayed with the Update ID of your job. Make a note of the Update ID, so that you can track the status of your job.
15. Click the desired option to either return to the article list or view the job status.

The update job is added to the Mass Updates job list queue.

View the Status of a Mass Update Job

You can track the status of the mass update jobs from the Mass Updates page. A mass update job can have various statuses such as Scheduled, Active, Canceled or Completed. You can view the number of articles you had selected for the job, the number of articles processed, the number of articles failed, and the number of articles updated so far.

For a detailed report, you can export the details of a mass update job to a .csv file. This file lists the status of each article and shows you which articles were updated, and which articles failed. It also provides a comment providing the reason why an article update failed.

Use this procedure to view the job status of your mass update:

1. Navigate to the article list page.
2. Click **Updates**.

   The Mass Updates page shows the list of mass update jobs.
3. Look for the row containing the Update ID of the job whose status you want to view.
4. Under **Actions**, click the actions menu, and click **Export Details**.

   A .csv file is downloaded with the details of the mass update job.

Modify a Mass Update Job

You can reschedule, cancel, or edit a mass update job that is still in Scheduled state. You can also resubmit a job whose status is Canceled.

Use this procedure to modify a mass update job:

1. Navigate to the article list page.
2. Click **Updates**.

   The Mass Updates page shows the list of mass update jobs.
3. Look for the row containing the Update ID of the job which you want to modify.
4. Under **Actions**, click the actions menu, and select the desired option.

Export Article Information

You can export the information about the articles that you see on the article list page to a .csv file. For example, if you have configured your article list page to show article ID, Title, Published Status, Version, State, and Expiration Date columns, then only these details will be exported for the articles you select on this page.

> **Note:** You can't use this feature to export the actual content of the article.

Use this procedure to export article information:

1. Navigate to the article list page.
2. Search for the articles.
3. Select the articles whose information you want to export.

   The Update icon shows the number of articles you have selected.
4. Click the Columns icon to select the columns that you want to view on the page.
5. Click the Export icon.

   A .csv file is downloaded with the details of the selected articles.

5 Manage Tasks and Workflows

Manage Tasks

While managing articles, your daily work may include creating, editing, and reviewing articles. In addition, you may approve articles and receive suggestions from agents on how you can improve articles.

You can use the Knowledge Tasks page to:

- View the list of tasks assigned specifically to you
- View other tasks that are available to you based on your role
- Keep track of tasks which need your attention and prioritize your work.

Types of Tasks

There are two types of knowledge tasks:

- Article Suggestion: This task is created when an agent makes a suggestion to improve a knowledge article. This task gets assigned to the owner of the article.
- Article Workflow: This task is created when the owner of an article initiates a review by selecting the Start Workflow option. This task is then available to an approver, such as a Knowledge manager, who can review the article, and approve or reject it.

Manage Workflows

During the lifecycle of a knowledge article, various knowledge users work together to create, review, edit, translate, approve, and publish a knowledge article.

A workflow is a list of review tasks performed by various knowledge users to ensure that an article is ready for publishing. Your Knowledge administrator defines the workflow and its related tasks.

Start a Workflow

Use these steps, if you are an author who needs an article to be reviewed by an approver before publishing:

1. Navigate to the article list page.
2. Click on the article that needs to be updated.
3. Click **Edit** and make updates to the article.
4. Click **Save**.
5. From the Actions menu, select **Start Workflow**.

   You get a confirmation message that the article has been submitted to workflow. A new task of type Article Workflow is created.

Approve or Reject a Workflow Step

When an author initiates a workflow to submit an article for review, a task of type Article Workflow is created and made available to an approver for review. The approver reviews the article and marks the task as Approved if the content is accurate. When a task is approved, it is closed, and a new task is created for the next step in the review process.

If the content requires changes, the approver provides feedback through comments and marks the task as Rejected. When a task is Rejected, a new task is created for the author who submitted the article into the workflow.

If you are an approver, here's how you can approve or reject a task:

1. Navigate to the Knowledge Tasks page.
2. Click on the task having the task type as Article Workflow.

   The article opens with the Workflow pane on the right.
3. Review the updated article.

   (Optional) Compare the updated version of the article with the previous article version to identify the updates.
4. (Optional) Enter your comments in the Workflow pane.

   These comments will be visible to the user working on the subsequent workflow task or viewing the article while still in the workflow. These comments can also be viewed in the article history.
5. Click **Approve** to approve the article. Else, click **Reject**.

Incorporate Approver's Feedback

When an approver provides feedback and marks a review task as Rejected, a new task is created for the author who submitted the article to the workflow. The author incorporates the review feedback and resubmits the article for review.

If you are an author, use this procedure to update and resubmit your article for review:

1. Navigate to the Knowledge Tasks page.
2. Click on the rejected task.

   The article opens with the Workflow pane on the right with the approver’s comments.
3. Click **Edit**.
4. Incorporate the approver's feedback.
5. Click **Save**.
6. Click **Resubmit**.

   You get a confirmation message that the article has been submitted to workflow. A new task of type Article Workflow is created. The review is initiated from the first step in the workflow.