

# Oracle Fusion Service

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**Implementing Knowledge  
Management with the Redwood  
User Experience**



Oracle Fusion Service  
Implementing Knowledge Management with the Redwood User Experience

F77877-11

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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.

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Thanks for helping us improve our user assistance!



# 3 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 Using Knowledge Management in the Redwood User Experience	Describes how to use Knowledge Management component and features.
REST API for Knowledge Management with the Redwood User Experience	Describes how you can use Oracle REST APIs to view and manage data stored in Knowledge Management with the Redwood User Experience.
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 with the Classic User Experience	Describes how to set up service components and features.
Oracle Fusion Cloud Sales Automation Implementing Sales	Describes how to set up and configure sales components and features.
Oracle Fusion Service Using Service Center in the Classic User Experience	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 Fusion Cloud Applications.





# 4 Get Started

## Overview of Implementing Knowledge Management

Administrators and authors can use Knowledge to create and manage a Service Center knowledge base. Agents can use the knowledge base to help resolve service requests, and self-service users can use knowledge in applications such as Digital Customer Service and My Knowledge to find relevant knowledge base articles.

If you have not previously implemented Knowledge, you can implement knowledge for Service Center by doing the following:

- Enable the knowledge functional area, schedule processes, and set up locales.
- Create knowledge base content and make it available in Service Center.
- Grant Service Center users the roles and privileges they need to access knowledge features.

If you have already implemented Knowledge for Fusion Service, you can implement Knowledge for Service Center by doing the following:

- Use your existing Fusion Service implementation. Service Center has access to content in the Service department, or application.
- Update roles and privileges so that Service Center users can access Knowledge features.

You use the setup and maintenance pages to implement Knowledge for Service Center. When you complete the implementation, service representatives and employees will use Next Generation knowledge features when they work with service requests. Knowledge base authors and managers will use existing knowledge authoring features to create, update, and publish knowledge base articles.

### *Related Topics*

## Enable the Knowledge Functional Area

To start a Knowledge implementation, a user with the Application Implementation Consultant role must opt into the offering that enables the Knowledge Management functional area. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide for more information on how to manage opt-in

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Click Change feature Opt in.
4. Select the Enable option for the Knowledge Management functional area.

When the opt-in process is complete, knowledge managers will have access to the Knowledge Management configuration options.

## How do I access Knowledge in Service Requests?

You must set up Knowledge such that agents can access and view knowledge articles in service requests (SRs). When you enable Knowledge, agents can see recommended articles based on contextual information in the SR, access and update their favorite articles, and search for knowledge articles.

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

**Note:** You must have the Sales Administrator or Service Administrator role to enable this feature. The UI limits Knowledge search results in SRs to 30 articles.

To enable Knowledge in Service Requests:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Service Request functional area.
4. Click Manage Service Request Knowledge Profile Options.
5. Set the SVC\_ENABLE\_KNOWLEDGE\_IN\_SR profile value to **Yes**.

## Schedule Knowledge Content Batch Process

Sometimes newly created articles, categories, and products don't appear in Knowledge Authoring and My Knowledge. To make these missing items available to your knowledge users, you need to run some knowledge scheduled processes and assign locales to knowledge users.

1. Schedule and run the **Knowledge Content Batch Process** job. 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 isn't recommended.
2. Assign locales to users. For more information, see [Why can't I create articles in Knowledge Authoring?](#)

**Note:** You need the SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV authorization to schedule Knowledge processes.

To run the scheduled process:

1. Go to **Tools**, and click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** as the process type.
4. In the **Name** field, type "Knowledge", and press Enter.  
This displays the list of available Knowledge processes.
5. Select the **Knowledge Content Batch Process** process and click **OK**.
6. Click **OK** in the Schedule New Process dialog box to go to the Process Details page for the job.
7. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
8. 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**

9. Click **Submit**.

## Administer Knowledge for Service Center

There are additional administration processes and tasks that you will need to perform as part of the implementation process and to support and refine your knowledge base to meet your organization's business requirements. The *Administering Knowledge Management* guide contains sections on these types of

- Creating and managing external document collections as part of the knowledge base.
- Managing the search dictionary.
- Using knowledge analytics.



# 5 Implement Knowledge Management Locales

## Overview of Knowledge Locales

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

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

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

### *Related Topics*

- [List of Available Locales](#)
- [Enable Locales](#)
- [Set the Default Locale](#)
- [Preferred Locales for Users](#)

## Enable Locales

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

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

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

**Note:** You can't disable the default locale.

## Set the Default Locale

You must choose one default locale. You can use the English, United States locale, which is set automatically, or change it to one that best meets your organization's needs. Authors and knowledge users can override the default locale by setting their user preferences.

1. Go to **Setup and Maintenance**.
2. Select **Service** from the Setup drop-down list.
3. Select **Knowledge Management** from the functional areas.
4. Select the **Manage Knowledge Locales** task.
5. Select any active locale in the **Default Locale** list.

## Preferred Locales for Users

Knowledge supports multiple locales, and articles can be published in a single locale, or be translated into multiple locales. For example, an article might be available in English United States (en-US), English Canada (en-CA), and French Canada (fr-CA) locales.

Knowledge users can set a preferred knowledge locale so that they can easily access knowledge in the language that contains the most useful content for them. They can set and change their locale preference at any time. In addition, administrators can set a default preferred locale so that users who don't set their own preferred locale will see knowledge in that language.

If a user doesn't set a preferred locale, and there is no default preferred locale set, the application uses the user's language and territory preference settings. This can result in fewer and less accurate search results. If there is no knowledge base content in the user's preferred language and territory, they will get no results when they search for knowledge.

### *Related Topics*

- [Default Preferred Knowledge Locale](#)

## Default Preferred Knowledge Locale

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

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

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

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

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

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

#### Related Topics

- [Set a Default Preferred Knowledge Locale](#)

## Set a Default Preferred Knowledge Locale

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

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

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

#### Related Topics

- [Default Preferred Knowledge Locale](#)

## List of Available Locales

You can set up your knowledge base to support multiple locales, and you can use any locale that is supported by the applications you are using Knowledge with.

Each locale is identified by a code that indicates its language and region. For example, en\_CA stands for the English, Canada locale. The following table lists the available locales:

Language	Territories	Locales	Display Name
Arabic	Egypt	ar-EG	Arabic - Egypt

Language	Territories	Locales	Display Name
	Saudi Arabia	ar-SA	Arabic - Saudi Arabia
	UAE	ar-AE	Arabic - United Arab Emirates
	Algeria	ar-DZ	Arabic - Algeria
	Bahrain	ar-BH	Arabic - Bahrain
	Iraq	ar-IQ	Arabic - Iraq
	Jordan	ar-JO	Arabic - Jordan
	Kuwait	ar-KW	Arabic - Kuwait
	Lebanon	ar-LB	Arabic - Lebanon
	Libya	ar-LY	Arabic - Libya
	Morocco	ar-MA	Arabic - Morocco
	Oman	ar-OM	Arabic - Oman
	Qatar	ar-QA	Arabic - Qatar
	Syrian Arab Republic	ar-SY	Arabic - Syrian Arab Republic
	Tunisia	ar-TN	Arabic - Tunisia
	Yemen	ar-YE	Arabic - Yemen
Chinese (Simplified)	China	zh-CN	Chinese, Simplified - China
	Hong Kong	zh-HK	Chinese, Simplified - Hong Kong
	Macau	zh-MO	Chinese, Simplified - Macau
	Singapore	zh-SG	Chinese, Simplified - Singapore
Chinese (Traditional)	Taiwan	zh-TW	Chinese, Traditional - Taiwan
Croatian	Croatia	hr-HR	Croatian - Croatia
Czech	Czech Republic	cs-CZ	Czech - Czech Republic
Danish	Denmark	da-DK	Danish - Denmark
Dutch	Belgium	nl-BE	Dutch - Belgium
	The Netherlands	nl-NL	Dutch - Netherlands
English	Australia	en-AU	English - Australia
	Canada	en-CA	English - Canada
	Ireland	en-IE	English - Ireland



Language	Territories	Locales	Display Name
	New Zealand	en-NZ	English - New Zealand
	UK	en-GB	English - United Kingdom
	USA	en-US	English - United States
	Hong Kong	en-HK	English - Hong Kong
	Iceland	en-IS	English - Iceland
	India	en-IN	English - India
	Indonesia	en-ID	English - Indonesia
	Israel	en-IL	English - Israel
	Singapore	en-SG	English - Singapore
	South Africa	en-SA	English - South Africa
Finnish	Finland	fi-FI	Finnish - Finland
French (Canadian)	Canada	fr-CA	French - Canada
French (European)	Belgium	fr-BE	French - Belgium
	France	fr-FR	French - France
	Switzerland	fr-CH	French - Switzerland
	Luxembourg	fr-LU	French - Luxembourg
German	Austria	de-AT	German - Austria
	Germany	de-DE	German - Germany
	Switzerland	de-CH	German - Switzerland
	Luxembourg	de-LU	German - Luxembourg
Hebrew	Israel	he-IL	Hebrew - Israel
Hungarian	Hungary	hu-HU	Hungarian - Hungary
Italian	Italy	it-IT	Italian - Italy
	Switzerland	it-CH	Italian - Switzerland
Japanese	Japan	ja-JP	Japanese - Japan
Korean	Korea	ko-KR	Korean - South Korea
Norwegian	Norway	no-NO	Norwegian - Norway

Language	Territories	Locales	Display Name
Polish	Poland	pl-PL	Polish - Poland
Portuguese, Brazilian	Brazil	pt-BR	Portuguese - Brazil
	Portugal	pt-PT	Portuguese - Portugal
Romanian	Romania	ro-RO	Romanian - Romania
Russian	Russia	ru-RU	Russian - Russia
Slovak	Slovakia	sk-SK	Slovak - Slovakia
Spanish	Mexico	es-MX	Spanish - Mexico
	Spain	es-ES	Spanish - Spain
	Argentina	es-AR	Spanish - Argentina
	Chile	es-CL	Spanish - Chile
	Colombia	es-CO	Spanish - Colombia
	Costa Rica	es-CR	Spanish - Costa Rica
	Ecuador	es-EC	Spanish - Ecuador
	El-Salvador	es-SV	Spanish - El-Salvador
	Guatemala	es-GT	Spanish - Guatemala
	Honduras	es-HN	Spanish - Honduras
	Nicaragua	es-NI	Spanish - Nicaragua
	Panama	es-PA	Spanish - Panama
	Peru	es-PE	Spanish - Peru
	Puerto Rico	es-PR	Spanish - Puerto Rico
	United States	es-US	Spanish - United States
	Venezuela	es-VE	Spanish - Venezuela
Swedish	Sweden	sv-SV	Swedish - Sweden
Thai	Thailand	th-TH	Thai - Thailand
Turkish	Turkey	tr-TR	Turkish - Turkey
Vietnamese	Vietnam	vi-VN	Vietnamese – Vietnam

# 6 Implement Knowledge Management Users

## Manage Knowledge Users

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

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

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

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

## Types of Knowledge Users

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

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

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

## Types of Knowledge Applications

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

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

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

## Knowledge Users and Roles

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

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

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

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

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

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

## Knowledge Authoring Requirement

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

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

### *Related Topics*

- [Why can't I create articles in Knowledge Authoring?](#)
- [Securing Sales and Fusion Service](#)
- [Securing HCM](#)

## Predefined Knowledge Roles

There are predefined knowledge roles to help you set up and manage users. Most organizations use the predefined roles as the basis for defining new roles to meet their specific needs. You can copy, edit, and save your own roles to assign to

**Note:** You can also create entirely new roles if there are no suitable predefined roles to copy and edit.

## Fusion Service Knowledge Access Roles

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

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

Role	Access Locations	User Groups	Application Content
Customer Service Representative	<ul style="list-style-type: none"><li>• My Knowledge</li><li>• Knowledge in SRs</li></ul>	<ul style="list-style-type: none"><li>• Internal Service</li><li>• Everyone</li></ul>	Fusion Service
Customer Service Manager	<ul style="list-style-type: none"><li>• My Knowledge</li><li>• Knowledge in SRs</li></ul>	<ul style="list-style-type: none"><li>• Internal Service</li><li>• Everyone</li></ul>	Fusion Service
Customer Self Service User	<ul style="list-style-type: none"><li>• Public web channels</li></ul>	<ul style="list-style-type: none"><li>• Everyone</li></ul>	Fusion Service

## Fusion Service Knowledge Authoring Role

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

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

Role	Access Locations	User Groups	Application Content
Knowledge Author - Service	Authoring	<ul style="list-style-type: none"><li>• Internal Service</li><li>• Everyone</li></ul>	Fusion Service

## General Knowledge Role

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

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

Role	Access Locations	User Groups	Application Content
Knowledge Manager	<ul style="list-style-type: none"><li>• My Knowledge</li><li>• Authoring</li><li>• Knowledge analytics</li><li>• Knowledge setup and maintenance tasks</li><li>• User management</li><li>• Public and internal articles</li></ul>	<ul style="list-style-type: none"><li>• Internal Service</li><li>• Internal HCM</li><li>• Employee</li><li>• Everyone</li></ul>	HCM and Fusion Service

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

## Create a New Authoring Role by Editing a Predefined Role

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

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

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

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

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

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

## Copy and Rename the Customer Service Representative Role

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

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

## Add Authoring Capability and Access to Content

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

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

## Add a Data Security Policy

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

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

## Assign Users to the Role

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

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

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

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

*Related Topics*

- [Why can't I create articles in Knowledge Authoring?](#)

## Change Users' Knowledge Roles

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

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



# 7 Set Up Knowledge Management User Groups

## Overview of User Groups

User groups are specific to Knowledge Management. They enable you to group the articles in your knowledge base and then define which users can see the articles in those groups.

There are predefined user groups, and you can define and implement your own user groups. User groups apply only to knowledge access; they determine who can see published knowledge base content. They do not affect access to content in knowledge authoring.

You add users to user groups by assigning them to roles that contain user group data security policies. Users can belong to more than one user group. When user groups are implemented, authors can assign articles to user groups during the authoring process. Articles can belong to more than one user group.

**Note:** User groups apply only to knowledge access; they determine who can see published knowledge base content. They do not affect access to content in knowledge authoring.

## Predefined User Groups

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

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

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

## How do I implement user groups in Knowledge?

You can use both predefined user groups and custom user groups that you create. In either case, you need to understand and set up the following to make effective use of user groups in Knowledge.

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

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

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

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

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

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

# 8 Configure Knowledge Base Content

## Knowledge Content for Service Center

You need to add content to your Knowledge for Service Center application. The basic unit of knowledge base content is an article. You can define any types of articles that your organization needs using content types.

If you have already implemented Knowledge for Fusion Service, then the content types that are assigned to that application are available to Service Center users. If you have not previously implemented Knowledge, you will need to create content types and assign them to the Service application.

## Knowledge Articles and Content Types

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

- Content elements, such as the title and text fields that make up the body of an article.
- Locale-specific article and field-level titles and descriptions.
- The relevant categories and products.
- The application that the content type is available in.
- Visibility to audiences at the article and field levels.

## Content Types and Applications

Each content type is specific to a single application. When you define a content type, you select the application that it belongs to. Content types that belong to Service are available to Service Center.

**Note:** Applications are also called departments in some contexts.

You can follow the process in Create Content Types in the Administering Knowledge guide to create content types for Service Center.

Remember that in order for content types to be useful in Service Center you must also set privileges for authors, and define user groups for agents and self-service users:

- Authors must have the right content type privileges for the types of articles they need to create and update
- Articles in Service content types must have the correct user groups assigned.

## Configure File Attachment Types

You can control the types of files that authors can attach to articles by editing the list of allowed file extensions.

You can enable or disable file attachments to articles when you define the article content types. Agents and other users can then download or view the attached files while using knowledge.

1. Go to **Setup and Maintenance**, and from the **Service** offering, select **Knowledge Management**.
2. Select **Manage Knowledge File Attachments**.
3. Update the file extension list as desired and click **Save**.

You can allow all file extensions by entering **\***.

**Note:** You enable file attachments in specific content types when you create and define content types.

### Related Topics

- [Create Content Types](#)

## Configure Rich Text Editor

You can configure the rich text editor used for authoring articles. The tools enabled here are available for authors in the authoring tool.

Use this procedure to configure the rich text editor:

1. In the Setup and Maintenance work area, go to the **Manage Knowledge Authoring Rich Text Editor** task:
  - o Offering: Service
  - o Functional Area: Knowledge Management
  - o Task: Manage Knowledge Authoring Rich Text Editor
2. Select the **Department**.
3. Configure the required editor tools.
4. Click **Save**.

## Manage Dynamic Links

A dynamic link is a URL that has a variable parameter in it and links to third party applications.

You can configure Knowledge Management to allow authors to use dynamic links in articles.

### Create a Dynamic Link

1. In the Setup and Maintenance work area, go to the **Manage Service Request Dynamic Links** task:

- Offering: Service
  - Functional Area: Productivity Tools
  - Task: Manage Service Request Dynamic Links
2. In the Manage Dynamic Links page, click **Add**, and enter the following information:
  - Object Type – The link type that will be displayed in Authoring when the user tries to insert a link.
  - Generate Pattern – Select the check box.
3. Click Ok.
  - A new custom object and a corresponding pattern is created.
4. In the Manage Dynamic Links page, select the custom object that you added.
5. In the second half of the page, click **Add** and enter the following information:
  - **External URL:** The URL that needs to be constructed when the dynamic link is in place.
    - Note that the external URL must contain {0} which is the parameter that's replaced with the text or number adhering to the pattern.
    - For example, if the link you want to generate is `https://appname.oraclecloud.com/pls/info_top?ptno=1234`, enter the External URL as `https://appname.oraclecloud.com/pls/info_top?ptno={0}`.
  - **Internal URL:** Enter the internal URL for the third party application, if any. If not, it can be the same as the external URL.
6. Click Save and Close.

## Enable Dynamic Links in the Rich Text Editor

After you create a dynamic link object, as a Knowledge Administrator, you must enable the dynamic link in the rich text editor.

Use the following procedure to enable dynamic links in the rich text editor:

1. In the Setup and Maintenance work area, go to the **Manage Knowledge Authoring Rich Text Editor** task:
  - a. Offering: Service
  - b. Functional Area: Knowledge Management
  - c. Task: Manage Knowledge Authoring Rich Text Editor
2. Select the **Department** for which you want to enable the dynamic links.
3. In the Links area, select the check box for the dynamic link you created.
  - By default, any new dynamic links you create are not enabled in the Links area.
4. Click **Save**.

## Manage Link Behavior

At the site level, you can configure the default behavior of URL links inserted in the articles. These links when clicked can open in a new tab or in the same tab.

Use this procedure to configure the URL link behavior:

1. In the Setup and Maintenance work area, go to the **Manage Knowledge Common Profile Options** task:
  - Offering: Service
  - Functional Area: Knowledge Management

- o Task: Manage Knowledge Common Profile Options

2. Click the **ORA\_CSO\_CONTENT\_DEFAULT\_URL\_LINK\_TARGET** profile option to define the URL link behavior
  - a. Select the desired **Profile Value**:
    - Links open in a new tab
    - Links open in the same tab
  - b. Click **Save**.

The default URL link behavior is saved. This applies only to URL links inserted in the articles after the configuration.

**Note:** This configuration does not apply to URL links in the articles created prior to configuring the URL links behavior. Refer the User guide to change the URL link behavior.

**Note:** This configuration does not apply to attachments inserted inside the article. Attachment links follow the behavior of the browser.

## Manage Vocabulary Terms

Adding your organization or industry specific words as vocabulary terms can help improve search results for those terms. For example, you could add unique product names, a company's stock ticker, or other unusual or misspelled terms that are common in your industry as vocabulary terms.

Vocabulary terms in knowledge articles can help you perform these operations on knowledge articles for a specific duration:

- boost (appear in top search results)
- block (hide from search results)

**Note:** When an article contains both a block term as well as a boost term, then block takes precedence.

Use this procedure to define the vocabulary terms:

1. In the Setup and Maintenance work area, go to the **Manage Knowledge Vocabulary** task:
  - o Offering: Service
  - o Functional Area: Knowledge Management
  - o Task: Manage Knowledge Vocabulary
2. Create a vocabulary term:
  - a. Enter the vocabulary term.
  - b. Select the locale.
  - c. Click **Add Synonym** to provide alternate text or term for the vocabulary term. This is optional.
  - d. Click **Save**.

The term appears in the Vocabulary Management page.

3. Boost or block articles containing the vocabulary term:
  - a. Enter the article ID.

- b. Select **Boost** or **Block** to define the priority.
- c. Select the expiration date (duration).
- d. Enter supporting notes, if any.
- e. Click the check mark to submit.
- f. Click **Save**.

## Configure Knowledge Article Creation from Service Request

Contact center representatives sometimes need an option to create knowledge articles from service requests.

**Note:** Contact center representatives who wish to use this feature must have knowledge authoring privileges.

To provide them this option, Administrators or Implementation consultants must do the following:

- *Enable Creation of Draft Knowledge Articles from Actions and Plans*
- *Create an Action Plan*

### Enable Creation of Draft Knowledge Articles from Actions and Plans

To enable this option:

1. Go to Setup and Maintenance.
2. Select **Service** or **Help Desk** offering.
3. Click the **Change Feature Opt In** link.
4. In the **Action Plans** row, click the pencil icon in the **Features** column.
5. Select the checkbox for the **Create Draft Knowledge Articles from Actions and Plans** feature in the **Enable** column.
6. Click **Done**.

### Create an Action Plan

To create an action plan:

1. In the Setup and Maintenance work area, go to the **Manage Action Plan Actions** task:
  - Offering: Service
  - Functional Area: Action Plans
  - Task: Manage Action Plan Actions
2. In the Actions page, click **Create Action**.
3. Create an action with the following parameters/attributes:
  - **Action:** The name of the action. For example, Create an FAQ from this SR.
    - Note:** The name you give for this action is what your users will have to type in order to use it.
  - **Type:** Article
  - **Visibility:** Internal Only

- **Context:** Service Request
  - **Duration:** Period of duration in days, hours, or minutes.
  - **Stripe Code:** CRM
  - **Subtype:** The content type of article. For example, FAQ.
4. In the **Attribute Mapping** tab, select the field to be populated from the **Attribute** choice list.
- a. In the **Mapped To** column, select which attributes of the Context (for example, Service Request) data will be copied from. Some Type (such as Article) attributes may require an Object to be mapped.

For example, to create an FAQ from a Service Request you can use the following mapping:

- **Content Body** object's child attribute mapping:

Attribute in FAQ	Mapped to Attribute in Service Request
Summary	Title
Question	Problem Description
Answer	Solution Description

- **Categories** object's child attribute mapping:

Attribute in FAQ	Mapped to Attribute in Service Request
Category Id	Category

- **Products** object's child attribute mapping:

Attribute in FAQ	Mapped to Attribute in Service Request
Inventory Item Id	Inventory Item ID
Organization Id	Inventory Organization ID
Product Group Id	Product Group ID

- b. Select **Locale**.

Ensure that it's an active locale and is in the same language as the name of the action. For example, you may select "Spanish - Spain" for an action named "Crear una FAQ a partir de este SR".

5. Click **Save and Close**.



# 9 Manage Workflows

## Overview of Workflows

A workflow is a sequence of steps you can define to enforce specific content management procedures for your organization.

A workflow consists of one or more steps to review and approve an article before it's published. Each step defines a task, and the task assignment appears in the user's **Knowledge Tasks** page.

The user can perform one of the following actions on a task:

- Approve the article for advancement to the next step in the workflow.
- Reject the article back to the previous step.
- Reassign the task to another user.

## Enable Workflows

By default, the workflow functionality in Knowledge Management is disabled. To use workflows in Knowledge Management, you must enable the respective activity type and standard lookup.

Use the following procedure to enable workflows:

1. In the Setup and Maintenance work area, go to the **Manage Activity Type and Subtype** task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Activity Type and Subtype
2. In the Manage Activity Type and Subtype page, search for 'article' and enable the **Task** check box for **Article Workflow**.
3. Click Save and Close.
4. In the Setup and Maintenance work area, go to the **Manage Activity Standard Lookups** task. Make sure you select **All Tasks** in the **Show** drop-down to view the task.
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Activity Standard Lookups
5. In the Manage Activity Standard Lookups page, click ZMM\_ACTIVITY\_OUTCOME.
6. Under Lookup Codes, search and enable the following lookup codes:
  - ORA\_KM\_APPROVED
  - ORA\_KM\_REJECTED
7. (Optional) You can change the meaning of the lookup codes in the **Meaning** field to align with your business processes. For example, you can change 'Rejected' to 'Save for future release'.

8. Click Save and Close.

## Create a Workflow

Before you create a workflow, you must plan your workflow in advance by considering all the possible steps in the publishing lifecycle.

Use the following procedure to create a workflow:

1. In the Setup and Maintenance work area, go to the **Manage Knowledge Workflows** task:
  - o Offering: Service
  - o Functional Area: Knowledge Management
  - o Task: Manage Knowledge Workflows
2. In the Workflows page, click **Create**.
3. Specify the following information:

Field	Description
<b>Name</b>	The name of the workflow process. To localize the workflow name, click the Localize icon and specify the workflow name for a locale.
<b>Publish articles automatically when complete?</b>	Disable this option if you want articles to be published manually when the workflow completes. By default, articles are published automatically after the workflow completes.

4. Complete the following procedure to add steps to the workflow:
  - a. Click **Step**.
  - b. In the Add Step page, specify the following details:

Field	Description
<b>Step Name</b>	The name of the workflow step. This name appears as a task to the users in the Knowledge Tasks page. To localize the step name, you must first create the step and then edit it to specify the step name for a locale.
<b>Reference Key</b>	An arbitrary text string used as internal identifier for the content. Make a note of the reference key which will be used to create a data security policy for this step.
<b>Duration</b>	The number of days for the user to complete this task.
<b>Allow editing in step?</b>	Disable this option if you don't want users to edit the article during this step in the workflow If you allow editing in a workflow step, it indicates that the author can edit the article during this step. After editing, the article continues to remain in the same step in the workflow and doesn't require approval from previous steps, if any.

Field	Description
Only assigned users can approve?	Determine if approvers other than the assigned user can approve this workflow step.

- c. Click **Create**.
5. Repeat step 4 to add more steps to the workflow.
6. Click **Content Types**, select the appropriate content types to which you want to associate this workflow, and then click **Add**. Note that only articles assigned to this content type will go through this workflow.
7. Click **Save** to save the workflow.

## Set Up User Privileges for Workflows

Workflows typically involve users of two types:

- Users who perform the tasks in a workflow
- Users who assign tasks to other users in addition to performing tasks

Users such as, Knowledge Managers, who assign tasks to other users require special privileges to assign tasks.

Here's what you must know about privileges for workflows:

- You must determine the tasks for which you need users with special privileges.
- Once you identify the tasks, you must make a note of the Reference Key for this step.
- To assign the special privileges to a user, you must first create a role, define a data security policy, and then assign the users to this role.

For example, if your workflow has a step named 'SME Review' and it needs a user to do the task assignment (if needed) and approve the task, you must perform the following steps:

1. Make a note of the Reference Key for this step.
2. Go to Tools, Security Console, Roles page, click **Create Role**.

If you have an existing role, you can also update it.

3. Enter the following information:
  - **Role Name:** SME Reviewer
  - **Role Code:** SME\_REVIEWER
  - **Role Category:** Common – Duty Role
4. Click **Next**.
5. If the user who is doing the SME Review also has the role of assigning the tasks to other users, complete the following configuration. Else, skip this step.
  - a. In the Functional Security Policy page, click **Add Functional Security Policy**.
  - b. Search for Knowledge Tasks.
  - c. Select **Manage Knowledge Tasks**.
  - d. Click **Add Privilege to Role**.
6. Click **Next**.

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7. In the Data Security Policies page, click **Create Data Security Policy**.
  8. Enter the following information:
    - **Policy Name**
    - **Database Resource:** Knowledge Workflow Steps
    - **Data Set:** Select by key
    - **REFERENCE\_KEY:** Reference key of the task that you made note of earlier
    - **Actions:** Approve or reject a Knowledge Workflow Step
  9. Click **Ok**.
  10. Complete the next steps.
  11. Click Save and Close.

# 10 Implement My Knowledge

## Set Up My Knowledge

You can set knowledge management profile options to set the My Knowledge menu and the age limit for recent articles. Most new implementations have these profiles set to Yes by default.

1. In the Setup and Maintenance work area, go to the Service offering.
2. Select the Knowledge Management functional area.
3. Select Manage My Knowledge Profile Options.
4. Select any of the following profile options to enable or disable specific features:
  - To enable the My Knowledge menu for Help Desk, set CSO\_ENABLE\_HCM\_KMHOME to Yes.
  - To enable the My Knowledge menu for Service, set CSO\_ENABLE\_SVC\_KMHOME to Yes.
  - To set the upper age limit in days for recent articles, select CSO\_RECENTLY\_UPDATED\_TIME\_PERIOD and specify the value in days. The default value is 30, so that articles older than 30 days will not display as recent articles.

