

Oracle Fusion Service

Using Knowledge Management



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F77879-06

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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 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.

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!

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

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

Related Guides

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

Title	Description
Oracle Fusion Service Implementing Knowledge Management	Describes how to set up knowledge management components and features.
Oracle Fusion Service Administering Knowledge Management	Describes how administrators can perform ongoing knowledge management operations and maintenance tasks.
Oracle Fusion Service Implementing Service Center with the Classic User Experience	Describes how to set up service components and features.
Oracle Fusion Cloud Sales Automation Implementing Sales	Describes how to set up and configure sales 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.
Sales and Fusion Service Creating and Administering Analytics	Describes how administrators can build and edit analytics.

Title	Description
Oracle Fusion Cloud Applications Using Common Features	Provides information on how to use features that are common across Oracle Fusion Cloud Applications.

Related Topics

2 Use Knowledge with Service Requests

Use Knowledge with Service Requests

You can use Knowledge to help solve service requests by finding articles that are relevant to the service issue, linking those articles to the request, and sending the helpful information to the customer.

When you open the Knowledge pane in a service request, you immediately get recommended articles based on the request's title, products, and categories. If the recommended articles don't resolve the issue, you can search for more articles until you find the content that you need.

You can keep a list of favorite articles, rate articles to show which ones are valuable and which ones need to be improved. You can also recommend new articles or updates to existing articles to continually improve knowledge base quality.

Access Knowledge in a Service Request

To access knowledge in a service request, open the Knowledge pane. The Recommended Answers tab shows you articles that are relevant to service request title and any additional product and category information. From here you can read articles, search for more articles, add knowledge to the service request, and manage your favorite articles list.

Search for Articles in a Service Request

If you don't see the article you need in Recommended Answers, you can search for more articles by entering new search terms, additional products and categories, and even multiple languages, if they are supported by your organization.

Be sure that you have set your preferred knowledge locale so that you get the best search results.

1. Select the search tab, and enter a search term.
2. Select a locale if you want to see results in a language other than your preferred knowledge locale.
3. Click the search icon.
4. Filter the search results by the request's categories or products if you need to.

Related Topics

- [Add Knowledge to Service Requests](#)

Set a Preferred Knowledge Locale

Your preferred knowledge locale sets your knowledge base language. If you don't set a preferred knowledge locale, you will get knowledge in the default preferred knowledge locale set by the administrator.

If the administrator has not set a default preferred knowledge locale, you will get knowledge in the locale that corresponds to your language and territory preferences.

Choose the locale that has the most articles that are useful to you. For example, let's say you live in France, but your organization's knowledge base articles are intended for users in the United States (en-US). Let's also say that your

language and territory preference is set to French, France. If an administrator has set the default preferred locale to en_US, all of the articles are available to you.

If you do not set a preferred knowledge locale, then you will see knowledge in the default preferred knowledge locale set by the administrator. If the administrator has not set a default preferred knowledge locale, then no articles are available to you, because there are no French articles in the knowledge base.

1. Click the user icon at the top right and select **Settings and Actions**.
2. Select Set Preferences.
3. Select Preferred Knowledge Locale and select a locale from the menu.

Related Topics

- [Default Preferred Knowledge Locale](#)

Add Knowledge to Service Requests

There are a few ways to use knowledge to help resolve an SR. You can add text from the article, or add a link to the article.

You can add a link directly from the knowledge pane, from the article details window, or by using the insert knowledge option when you compose an SR message.

Link Articles to SRs

Link an article to an SR to help resolve an issue. Linking articles to SRs helps agents quickly find the right answers to resolve similar issues in the future.

1. Select the article that you want to link and click the **Link article to service request** icon.
2. Save the SR to complete the link. The link will not be active until you save the SR.

View Linked Articles

View the articles linked to an SR to see if they are relevant to the issue you are working on. Click the **Delete** icon to remove a linked article.

1. Click the **Linked Articles** tab in the SR.
The linked articles window displays all articles linked to the SR.

Send Articles to Customer

You can send articles to customers by adding them as text or links in the SR. You can add them from the knowledge pane or from the article details window.

1. Open an SR and click the slider to open the knowledge pane.
2. Locate the article that you want to add to the SR. You can click the article to view the contents.
3. Click the **Insert as Text** icon if you want to insert the article as text in a response message.
Click the **Insert as Link** icon if you want to insert the article link in a response message.
4. Select a channel type and edit the message as desired.
5. Click **Send**, or click **Save to Draft**.

Add Article Links to SR Messages

You can send articles to customers by inserting the article links into the SR message. You can only insert articles that are linked to the SR.

1. Open an SR in edit mode and click the **Messages** tab.
2. Select the message type that you want to send from the **Compose** drop down list.
The message pane opens.
3. Click **Insert Knowledge**.
The Insert Knowledge page opens and the articles that are linked to the SR appear.
4. Select the article that you want to insert, click the **Insert as Text** icon or the **Insert as Link** icon, and then click **Done**.
The article is inserted as text or link in the SR message depending on what you selected.
5. If you inserted the article as text, you can edit the article's text as desired.
6. Click **Send**, or **Save to Draft**.

Related Topics

- [Use Knowledge with Service Requests](#)

Send an Article Link to a Chat User

You can send links to knowledge articles directly to chat users to provide them with quick, consistent and high-quality answers to their questions.

When you are working in an SR while chatting in Live Window, you can use the send link chat action to send an article link to an end user to help answer their question. When you send a link from the SR, the link information displays in chat, and the customer can paste the link into a browser address field to open the article in the Digital Customer Service application. Your administrator needs to have Knowledge set up to work with DCS before you can use this feature.

Save Links to Articles from the Knowledge Panel

You can copy the URL of an article to add to your bookmarks or share with other agents or colleagues. You should avoid inserting these direct links into public facing documents because users must have access to My Knowledge to use the link.

1. Open an article in the knowledge panel.
2. Click the copy icon at the end of the title row to copy the article URL.

Add Articles to Favorites

Add articles as favorites for quick and easy access. Open an article, then click the Star icon. You can access your favorite articles in the Favorites section on the knowledge tab, and on the My Knowledge page.

Rate an Article

Rate articles based on their quality and usefulness. You cannot rate articles that you own.

There are two types of ratings. Your site may use either the 5 Star type or the Like or Dislike type. The 5 Star type is the default. Choose a rating from the article details page.

3 Use My Knowledge

My Knowledge

My Knowledge is a convenient place that you can use to find knowledge articles. You can also use My Knowledge to see recently published articles and bookmark your favorite articles.

My Knowledge is available to Service and HR Help Desk users, and there is also a general My Knowledge page that is available from the Knowledge menu.

You can access My Knowledge using these paths:

- If you are using Service, select **Service**, then **My Knowledge**.
- If you are using HR Help Desk, select **Help Desk**, then **My Knowledge**.
- If you want to use the general page, select **Knowledge**, then **My Knowledge**.

You must set your preferred knowledge locale to use My Knowledge.

Related Topics

- [Search for Articles in My Knowledge](#)
- [Set a Preferred Knowledge Locale](#)
- [Add Articles to Favorites](#)

Search for Articles in My Knowledge

You can search in My Knowledge from Service, HR Help Desk, and Knowledge. You can search for articles in any locale that is supported by your application.

If your administrator has enabled filtering, you can limit the search results in Service and HR Help Desk by product, category, or type of article.

In Knowledge > My Knowledge, you can't limit search results by product, category, or type of article. If you have access to more than one application, you can limit search results to the application that you are interested in before you search.

1. Enter the term in the **Search** field.
2. Click the **Show Advanced Search** icon if you want to select a locale other than your preferred locale.
3. In Service and HR Help Desk Applications, select a product, category, or content type if you want to limit the search results to these criteria.
4. Click the **Search** icon.

You can select an article from the search results to view its contents. The article view also contains information about the version, author, last update and publishing dates, and its rating.

Note: To view the aggregate search results, you should execute the Knowledge Article View Aggregation and Knowledge Search Aggregation processes.

See *Schedule Knowledge Process* for more information on scheduling knowledge processes.

Save Links to Articles in My Knowledge

You can copy the URL of an article to your clipboard and then paste the URL into a separate document to save it for later reference.

1. Open an article in My Knowledge.
2. Click the copy icon at the end of the title row to copy the article URL.

4 Use Knowledge Authoring

Knowledge Authoring

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 can use knowledge articles to easily find solutions to customer issues and link articles to customer incidents. To access Authoring, select Authoring in the Navigator panel.

Create Good Document Titles

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

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

Knowledge Articles

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

You can create these kinds of articles:

- FAQ
- HCM FAQ
- Solution
- HCM Solution
- Your organization's content types

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.

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. Select the content type.
3. Enter the required and optional content for the article.
4. Set an expiration date, if needed.
5. Attach files to the article if needed.
6. Add categories, products, and the user groups who can access it.

Choose the 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 departments that you have privileges to, and your authoring privileges within those departments.

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.

Set an Expiration Date

You can set a date for an article to expire when you create or edit an article. Some information is valid or important to users only for a limited time. 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.

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 popular types of files, 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. An administrator has to allow attachments individually for each content type, and sets the types of files that you can attach.

To attach a file, select + in the attachments section, browse for the file, and click Attach.

Add Categories to Articles

Add categories to articles so that users can easily find articles that are relevant to their questions by filtering search results and browse lists. Categories can be 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. Select the category from Available Categories.
2. Click the right arrows to move the category to the Selected Categories.

If there are more than 100 categories, use Search to locate categories of interest.

Add Products to Articles

Add 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. Select the product from Available Products.
2. Click the right arrows to move the product to Selected Products.

Note: If there are more than 100 products, use Search to locate products of interest.

Add User Groups to an Article

Add one or more user groups to the article to set its visibility. 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 Desktop
- 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.

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.

You can learn about creating user groups and assigning them to roles by reading User Groups in the Administering Knowledge Management guide.

Related Topics

Intelligent Advisor Interviews in Knowledge Articles

You can include Intelligent Advisor interviews in knowledge articles.

Adding interviews to articles enables knowledge users to get answers about policies and other business processes by answering guided questions directly in the body of the article itself. Interviews that are embedded in articles are available to agents working in service requests, and to self-service users of My Knowledge and other knowledge solutions.

Authors can add interviews when they create or edit articles. When authors or reviewers open the article in the authoring application, they will see the interview just as self-service users will. Self-service users can view an article and respond to the embedded interview questions. 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.

Related Topics

- [Oracle Intelligent Advisor](#)

Add an Interview to an Article

You can add Intelligent Advisor interviews to articles to enable users to quickly access and interact with guided interviews to answer questions and resolve issues.

1. Click the Add Interview icon in the editor toolbar.
2. Select the deployment.
3. Select the locale if multiple locales are available.
4. Enter any optional seed data in the interview window.
5. Save and publish the article.

The interview will be available to knowledge users when the next content processing cycle completes.

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**.

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**.

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, you create an article. 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. If you make additional revisions and then save but don't publish, the article version number becomes 1.1.

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 effecting 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 Versions

Compare the current live version of an article to the previous version by opening the article and selecting Compare from the Actions menu.

Compare any two versions of an article:

1. Open the article.
2. Select **History** from the actions menu.
3. Select two versions and click **Compare Versions**.

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.

Advanced Search

You can use Advanced Search to filter search results by Locale, User Group, Content Type, and Article State.

The Article States you can filter on are draft, expired and, live.

You can use the article state filter in Advanced Search to find expired articles you want to extend the availability on. You can then change the expiration date for an article to extend the availability of the article. Of course, you must republish the article if you extend the expiration date of an expired article. Similarly, you can filter for **Live** articles and then sort by **Expiration Date** to locate articles with approaching expiration dates

You can also find draft articles with approaching publish dates to schedule reviews or change the publish date.

Translate Articles

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.

A translated article is a new article, designated as version 0.1, but the knowledge base maintains a relationship between it and the original article. 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 desired. You can copy the properties from the source article.
5. Use the **Add a comment** link if you want to keep track of the changes you make.
6. Click **Create** to complete the translation.

