

# Oracle Fusion Service

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## **Implementing Knowledge Management**



Oracle Fusion Service  
Implementing Knowledge Management

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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](#).

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

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 About This Guide

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

### *Related Topics*





## 2 Overview of Implementation

### Implement Knowledge

Before you start a Knowledge implementation, familiarize yourself with the primary functional areas of the Knowledge offering.

To start an implementation of Knowledge, a user with the Application Implementation Consultant role (ORA\_ASM\_APPLICATION\_IMPLEMENTATION\_CONSULTANT\_JOB) must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

*Related Topics*

### Knowledge Offering

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

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

Functional Area	Description
Knowledge Locales	View, enable, disable locales, and configure the default locale.
Users and User Groups	work with roles, privileges, policies, and knowledge user groups to set up and maintain users for your application.
Content Types	Define the types of articles for your database.
Articles	Create, edit, publish, translate articles in your knowledge base.
Collections	Create and manage groups of documents from web sites or document repositories.
Search Dictionary	View, edit, and add concepts and synonyms to the dictionary to enable a quick search of the knowledge base.
Analyze Knowledge	Use prebuilt dashboards to understand how authors are creating, updating, and publishing knowledge base articles.

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

Implementing Knowledge involves the following:

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

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

## Inactive Knowledge Profile Options

**Note:** This topic is only applicable to Fusion Service Knowledge Management with Redwood User Experience.

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

## Import Content from an Existing Knowledge Base

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

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

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

## 3 Enable Knowledge Features

### 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**.

### Configure Knowledge in Service Requests

You can enable or disable knowledge management profile options, like the ability to filter search results by category and product. For most new implementations, these profiles are set to Yes by default, meaning that the features are enabled.

1. In the Setup and Maintenance work area, go to the Service offering.
2. Select the Knowledge Management functional area.
3. Select Manage Knowledge Panel Profile Options.
4. Set the profile options as follows:
  - o To enable filtering of knowledge panel search results and recommended answers by category, set CSO\_ENABLE\_CATEGORY\_FILTER to Yes.
  - o To enable agents to maintain a list of their favorite articles in the knowledge panel, set CSO\_ENABLE\_KNOWLEDGE\_FAVORITING to Yes.
  - o To enable agents to link articles to service requests, set CSO\_ENABLE\_KNOWLEDGE\_LINKING to Yes.
  - o To enable agents to filter search results by locale, set CSO\_ENABLE\_LOCALE\_FILTER to Yes.
  - o To enable the filtering of knowledge panel search results and recommended answers by product, set CSO\_ENABLE\_PRODUCT\_FILTER to Yes.
  - o To enable the application to display article excerpts in addition to titles in search results and recommended answers, set CSO\_SHOW\_ARTICLE\_SNIPPET to Yes.
  - o To enable the application to add product concepts to the dictionary automatically, set CSO\_ENABLE\_AUTO\_PRODUCT\_CONCEPT\_GENERATION to Yes.

**Note:** The UI limits Knowledge search results in SRs to 30 articles.

## Configure My Knowledge Features

From the My Knowledge page, 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.

**Note:** The UI limits My Knowledge search results to 30 articles.

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.

## 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](#)

# Why can't I find newly created articles, categories, and products in Knowledge Authoring and My Knowledge?

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 following knowledge processes:
  - Knowledge Content Batch Process: This job updates Knowledge categories and products to reflect recent changes to Service and HCM products and categories. Schedule this job to run only once per day. Running this job more frequently isn't recommended.
  - Knowledge Search Batch Process: (Not applicable for Redwood Knowledge, as the search index updates automatically when you publish an article in Redwood Knowledge.) This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes. The job frequency must not be less than 15 minutes.
2. Assign locales to users. For more information, see *Why can't I create articles in Knowledge Authoring?*

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

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

To run the scheduled processes:

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 process you want to schedule and click **OK**. You need to repeat the steps for each of the following processes:
  - Knowledge Content Batch Process
  - Knowledge Search Batch Process (Not applicable for Redwood Knowledge)
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**
  - For the Knowledge Search Batch Process (Not applicable for Redwood Knowledge), set the following:
    - **Frequency:** Hourly/Minute
    - **Time Between Runs:** Hours 0 Minutes 15

- **Start Date**
- **End Date**

9. Click **Submit**.

## Enable Intelligent Advisor Interviews in Knowledge Articles

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

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

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

### *Related Topics*

- [Oracle Intelligent Advisor](#)

## Enable Responsive Knowledge in HCM Application Pages

You can enable a responsive user experience for the Knowledge Search component in HCM application pages. When you enable responsive knowledge, the enhanced experience applies to all responsive HCM application pages that have knowledge implemented.

Responsive knowledge provides recommended articles based on users' contextual information, and also supports additional searching based on users' search terms and other criteria. Users can also access their saved favorite articles.

**Note:** The responsive user experience is not available for the My Knowledge page or the Knowledge SR panel in HCM applications.

You must have the responsive user experience enabled in your HCM application, and for the specific pages where knowledge is implemented in order to use responsive knowledge. The responsive user experience is enabled by default in HCM applications.

You enable knowledge in your HCM application by implementing the Knowledge Search component, which is also called the knowledge widget. There is a single process to enable and configure knowledge in HCM application pages in responsive or non-responsive mode. Follow the enablement steps in this topic, then follow the process in Configure End-User Access to Knowledge in the Administering Knowledge guide, beginning with Add Knowledge to HCM pages.

1. Click **Setup and Maintenance** in the springboard menu.

2. Select the **Service** offering.
3. Select the **Knowledge Management** functional area.
4. Select **Manage Administrator Profile Options**.
5. Set the HCM\_KM\_WIDGET\_RESPONSIVE\_PAGES\_ENABLED profile option to Y.

*Related Topics*

- [Add Knowledge to HCM Application Pages](#)

## Implement Knowledge in Digital Assistant for HCM

You can configure knowledge management as a skill in Digital Assistant, which makes it available to HCM HR Help Desk users in multiple supported channels, such as SMS, Slack, and messenger applications.

End users can then benefit from Digital Assistant's artificial intelligence-driven conversational engagement while using knowledge to search for and find answers to their questions. You need to have knowledge management configured for HCM HR Help Desk, and Digital Assistant configured for HCM.

The knowledge management skill has four intents: Find Article, Search, Help, and Welcome. When a user enters a phrase, digital assistant checks whether that phrase matches a knowledge management intent. For example, these user phrases match the Find Article intent:

- find
- find an article
- let me see an article
- look for
- look up an article
- retrieve an article
- show me an article

Digital assistant also uses its training data to extend matching to similar phrases over time. You can also extend digital assistant skills to meet specific business requirements. You can learn more about skills and extending them in the Skills section of the Digital Assistant guide.

When digital assistant matches a user's phrase to Search and Find Article intents, knowledge prompts the user for an access token and provides results based on the user's knowledge privileges. Users who don't have knowledge privileges will see only public articles in their results.

*Related Topics*





# 4 Implement 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](#)

## 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
	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

Language	Territories	Locales	Display Name
	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
	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

Language	Territories	Locales	Display Name
	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
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

Language	Territories	Locales	Display Name
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

## 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](#)

# 5 Implement Knowledge Users

## Manage Knowledge Users

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

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

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

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

## Types of Knowledge Users

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

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

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

## Valid Knowledge Users

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

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

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

#### *Related Topics*

- [Securing Sales and Fusion Service](#)
- [Securing HCM](#)

## Types of Knowledge Applications

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

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

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

## Knowledge Users and Roles

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

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

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

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

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

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



## Knowledge Authoring Requirement

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

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

### Related Topics

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

## What are the predefined knowledge roles?

You can use built-in, out of the box, default knowledge roles available in Knowledge to set up and manage knowledge users such as agents, managers, and authors. Most organizations use the predefined roles as the basis for defining new roles to meet their specific needs. You can copy, edit, and save your own roles to assign to users so that they have the right privileges and policies for your organization. You can also create entirely new roles if there are no suitable predefined roles to copy and edit.

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

## 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> </ul>	<ul style="list-style-type: none"> <li>• Internal Service</li> </ul>	Fusion Service

Role	Access Locations	User Groups	Application Content
	<ul style="list-style-type: none"> <li>Knowledge in SRs</li> </ul>	<ul style="list-style-type: none"> <li>Everyone</li> </ul>	
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

## HCM Knowledge Access Roles

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

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

Role	Access Locations	User Groups	Application Content
Human Resource Help Desk Manager	<ul style="list-style-type: none"> <li>Authoring</li> <li>My Knowledge</li> <li>Knowledge in HCM service requests</li> </ul>	<ul style="list-style-type: none"> <li>Everyone</li> <li>Employee</li> <li>Internal HCM</li> </ul>	HCM
Knowledge Search - HCM	<ul style="list-style-type: none"> <li>My Knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Internal HCM</li> </ul>	HCM

## HCM HR Help Desk Knowledge Authoring Role

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

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

Role	Access Locations	User Groups	Application Content
Knowledge Author - HCM	Authoring	<ul style="list-style-type: none"> <li>Everyone</li> <li>Employee</li> <li>Internal HCM</li> </ul>	HCM
Human Resource Help Desk Manager	<ul style="list-style-type: none"> <li>Authoring</li> <li>My Knowledge</li> <li>Knowledge in HCM service requests</li> </ul>	<ul style="list-style-type: none"> <li>Everyone</li> <li>Employee</li> <li>Internal HCM</li> </ul>	HCM

## General Knowledge Role

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

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

Role	Access Locations	User Groups	Application Content
Knowledge Manager	<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.

## How do I add articles as favorite?

You can implement favorites so that users can bookmark frequently-used articles. Favorites provides users with quick and easy access to the articles they use most often.

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

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

To enable favorites:

1. Go to **Setup and Maintenance**.
2. Select the **Service** offering and select **Knowledge Management**.
3. Click any of the following:
  - **Manage Knowledge Common Profile Options**
  - **Manage Knowledge Panel Profile Options**
4. Click **CSO\_ENABLE\_KNOWLEDGE\_FAVORITING**.
5. Set the **Profile Value** at Site level to **Yes**.

**6. Click **Save and Close**.**

Your users can now add articles as their favorite articles.

To add an article as favorite:

1. Navigate to **Knowledge > My Knowledge**.
2. Search for the article.
3. In the search results, click the star icon next to the article to add it as favorite.

## 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.

## Example: Set Up the Employee User Group

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

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

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

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

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

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

## Create a New Role for Employees

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

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

## Add Data Security Policies to Grant Access

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

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

1. Go to the Data Security Policies page in the HCM Employee role.

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

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

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

## Assign Users to the HCM Employee Role

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

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

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

## How do I assign users to a user group in Knowledge?

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

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

You can create, update, and delete user groups to control access to published knowledge articles. You must have the knowledge manager role, or a similar role that includes the Knowledge Setup and Maintenance privilege to create user groups.

To create a user group:

1. Go to Setup and Maintenance.
2. Select the **Service** offering and select **Knowledge Management**.



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

**Note:** To grant a user access to any content that is assigned to a user group other than **EVERYONE**, you must assign the user:

- a role with a Data Security Policy (DSP) that grants access to the intended department
- a role with a DSP that grants access to one or more user groups

You must ensure that the department DSP is related to the same department (such as HCM, Internal Help Desk, or Service) as the user group DSP. For example, if a user role only has an HCM department DSP and a Service user group DSP, then a user assigned to this role will not have access to articles with the user group specified in that Service user group DSP.

## Define a User Group Data Security Policy in a Role

You must have privileges to access the Security Console to define a Data Security Policy.

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

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

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

## Define a Department Data Security Policy in a Role

You must have privileges to access the Security Console to define a Data Security Policy.

You can edit a role to add a data security policy for a department.

1. Go to **Tools > Security Console > Roles** page and locate and open the role that you want to add the department data security policy to.
2. Edit the role and go to the Data Security Policies page.
3. On the Data Security Policies page, click **Create Data Security Policy**.
4. Enter a policy name.
5. For **Data Resource**, search for and select "Knowledge Departments", and click **OK**.
6. For **Data Set**, select **Select by key**.
7. Enter the department reference key in the **Select a primary key value** field.
8. In the **Actions** field, select **Access Content with Department**.

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

## Assign the Updated Role to Additional Users

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

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

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