Oracle

Engagement Cloud
Using Service Request Management

Release 12
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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide is intended for users who are involved in creating and managing service requests. The activities in this guide are only available if the implementation tasks for Oracle Engagement Cloud are complete. To set up and work with the additional features of Oracle Engagement Cloud, see Oracle Sales Cloud documentation on Oracle Help Center at https://docs.oracle.com.

Related Guides

You can refer to the following related guides to understand more about the information covered in this guide.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Applications Cloud Using Common Features</td>
<td>Provides an overview of the application functionality that is common across the applications</td>
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<td>Oracle Sales Cloud Using Customer Contracts</td>
<td>Contains information to help end users who are charged with creating and managing customer contracts.</td>
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<td>Contains information to help end users manage customer information and customer data quality.</td>
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<tr>
<td>Oracle Sales Cloud Using Incentive Compensation</td>
<td>Contains information about administering and maintaining sales compensation and payment plans.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Leads</td>
<td>Contains information to help sales end users who are charged with creating leads and managing the various aspects of leads.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Contains information to help sales managers, sales people, and other sales end users when using Oracle Sales Cloud to perform their day-to-day tasks.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2 Managing Service Requests

Managing Service Requests: Overview

Service request management involves the following tasks:

- Capturing Service Requests (SRs)
- Organizing and assigning SRs
- Managing the life cycle of an SR

You can capture new SRs in the following ways:

- User data entry
- APIs
- File import

You can organize and assign SRs as follows:

- Assign SRs to queues either manually or using the Assignment Manager.
- Assign SRs to team members through the Assign To field in the SR page.

An SR typically moves through the statuses: New, Waiting, In Progress, Resolved, and Closed. You must know the following about an SR life cycle:

- You must have sufficient privileges to update the SR status. You can reopen a closed SR only if you have the Update privilege.
- Whenever the SR status is set to Resolved, the Resolved Date will be set to the current date.
- If you move an SR from the Resolved status to any status other than Closed, then you must set the Resolved Date to blank.
- If you move an SR that isn’t in Resolved status to Closed status, then set the Resolved Date to the current date.
- If you move an SR from the Resolved status to any type other than Closed, then set the reopen date to the current date.

Note: You can customize the SR statuses according to your requirements if you have sufficient privileges.

Creating and Editing Service Requests

Watch: This video tutorial shows you how to create and edit service requests.

Creating and Editing a Queue: Procedure

You can create queues to group a related sets of service requests (SRs). You can associate active queues with the SRs using the user interface or through the Assignment Manager rules. You can also associate resources with a queue to provide those
queue members with a view of the SRs assigned to the queue. To create a queue, you must have the service request power user duty role.

To create or edit a queue, do the following:

1. Sign in to the home page and open the Navigator.
2. Select Queues from the Service menu.
3. To edit a queue, do the following:
   a. Click any of the queues in the list, make the required changes, and save them.
   b. To delete a queue, click Delete Queue from the Actions menu. You can delete only a queue that has no open SRs. Hence, before deleting a queue ensure that all assigned SRs are closed or are reassigned to another queue.
4. To create a queue, do the following:
   a. Click Create Queue.
   b. Enter the name and description for the new queue, and select the Enabled check box if you want the queue to be enabled.

\[\textbf{Note:}\] A queue must be enabled for service requests to be assigned to it. If an active queue is disabled, then the SRs currently assigned to it aren’t affected, but the users aren’t allowed to associate anymore SRs with it.

5. Click Save and Close to return to the Queues page.

The queue is created.

Assigning Service Requests to Queues

\[\begin{align*}
\text{Watch:} & \quad \text{This video tutorial shows you how to assign service requests to queues.}
\end{align*}\]

Adding Resources and Resource Teams to a Queue: Procedure

To add resources or resource teams to a queue, do the following:
Sign in to the home page, and select the queue from the Queues menu.

To add resources:

1. Click Resources.
2. On the Resources page, click Add Resources.
3. On the Add Resources page, enter the search criteria and click Search.
4. Select the resources from the search results and click OK to add them to the queue.

To add resource teams:

1. Click Resource Teams.
3. On the Add Resources Teams page, enter the search criteria and click Search.
4. Select the resource teams from the search results and click **OK** to add them to the queue.
The resources and the resource teams are added to the queue.

**Service Request List Management: Explained**

You can perform the following tasks from the Service Requests page:

- **Finding SRs:** Use the **Find** search box to retrieve service requests by their reference numbers.
- **Use the List drop-down list as follows:**

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing all SRs</td>
<td>Select <strong>All Open Service Requests.</strong></td>
</tr>
<tr>
<td>Listing all SRs assigned to you and not closed yet (This view is the default.)</td>
<td>Select <strong>My Open Service Requests.</strong></td>
</tr>
<tr>
<td>Viewing SRs that you created and in open status</td>
<td>Select <strong>Open Service Requests Created By Me.</strong></td>
</tr>
<tr>
<td>Viewing SRs assigned to a queue that includes you as a member</td>
<td>Select <strong>Open Service Requests Not Assigned to a Queue.</strong></td>
</tr>
<tr>
<td>Viewing SRs assigned to a team that includes you as a member</td>
<td>Select <strong>Open Service Requests Where I Am on the Team.</strong></td>
</tr>
<tr>
<td>Creating your own customized searches</td>
<td>Select <strong>Create or Edit Lists.</strong></td>
</tr>
<tr>
<td>Doing an advanced search</td>
<td>Click the <strong>Show Advanced Search</strong> button next to the List drop-down list. For more information on the procedure to do an advanced search, see <strong>Doing an Advanced Search</strong> in this topic.</td>
</tr>
</tbody>
</table>

- You can perform a mass update of the SR fields using the **Update** option under Actions as described in the section **Performing a Mass Update** in this topic.
- **Use the Create Service Request option** to create an SR as explained under Creating and Editing a Service Request: Procedure.

**Doing an Advanced Search**

Advanced search lets you narrow down your search by entering more specific search criteria. For example, if you want to see all the open SRs that are assigned to your subordinates and that are in progress, do the following:

1. Click the **Show Advanced Search** button.
2. Select **All Open Service Requests** in the Saved Search field.
3. For the Record Set, select **Equals** and **Assigned to my subordinates.**
4. For the Status, select **Equals** and **In Progress.**
5. Optionally, click **Add** to add more search criteria.
6. Optionally, click **Save** to save the search for future use.
Performing Mass Update on Service Requests

The following procedure describes how to perform a mass update on the service request list.

1. Select **Update**.
2. Select the SRs you want to update. To select multiple SRs, hold down the **Ctrl** key and select each SR.
3. The **Update** button shows the number of SRs selected.
4. Click **Update** to view the Update Service Requests dialog box.
5. Select a field to be updated from the drop-down list and a value for the update, and click **Submit** to assign the queue to all the selected SRs.

Creating and Editing a Service Request: Procedure

To create a service request (SR), select the Service Requests menu from the Navigator page, and on the Service Requests list page, click **Create Service Request**. The Create Service Request page opens.

**Note:** To create service requests for partner accounts, see the topic Creating and Editing Service Requests for Partners.

Creating or editing an SR involves the following steps:

- Entering the summary information
- (Optional) Composing messages
- (Optional) Adding contacts
- (Optional) Adding team members
- (Optional) Creating activities
- (Optional) Accessing Oracle Social Network
- (Optional) Viewing linked articles

Entering Summary Information

Enter the required information for all the fields along with a detailed description of the SR (the problem description, symptoms, and additional information) in the Problem Description area. While some of the fields are self-explanatory, note the following.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Select the account associated with the service request.</td>
</tr>
</tbody>
</table>
| Primary Contact| Select the primary contact for the account that you selected. To be able to save the SR, the account and the primary contact you select must be related to each other. Depending on your selection, the following occurs:  
• If you select an account, then only contacts of that account are listed for search.  
• If you do not select an account, then all contacts are available for search. |
### Field Description

- **If you attempt to change an account after selecting a primary contact, a message is displayed confirming the deletion of the invalid contacts associated with the service request. If you select Yes, the contacts associated with the account are deleted.**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severity</td>
<td>Select the SR severity.</td>
</tr>
<tr>
<td>Critical</td>
<td>Select this option to include the service request in the reporting metrics about critical SRs. It does not affect the service request resolution.</td>
</tr>
<tr>
<td>Category</td>
<td>Select an SR category.</td>
</tr>
<tr>
<td>Product</td>
<td>Select the product group or product that is associated with the SR.</td>
</tr>
<tr>
<td>Queue</td>
<td>Select a queue to which the SR is assigned.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Select the resource that owns the service request and appears as the primary member of the SR team.</td>
</tr>
<tr>
<td>Channel Type</td>
<td>Select a channel through which the SR is sent to the customer support. You can select Email, Phone, or Web channel.</td>
</tr>
<tr>
<td>Status</td>
<td>You must have the Status Update privilege to be able to change the SR status.</td>
</tr>
</tbody>
</table>

You can associate a customer asset with an SR and add an Asset drop-down list to the summary page by using the application composer. Assets are specific instances of products that your customers have purchased. They typically have a serial number, date of purchase, date of install, and so on.

If you select an account for the SR, then you can select an asset for that account, using the Asset drop-down list. If you do not select an account but associate a contact with the SR, then you can pick an asset for the contact. If you do not select an account or a contact, you are not allowed to select an asset.

When you start creating an SR, the Create Service Request page displays three buttons: **Save and Continue, Save and Close, and Cancel**; once you enter a title and save the SR, or open an SR for editing, the page also displays the **Actions** menu. Use these options as follows.

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign to Me</td>
<td>Select this option to assign the SR to yourself.</td>
</tr>
<tr>
<td>Copy</td>
<td>Select this option to make a copy of the SR and to create an SR.</td>
</tr>
<tr>
<td>Delete</td>
<td>Select this option to delete an SR. This option is available only to administrators.</td>
</tr>
<tr>
<td>Forward</td>
<td>Select this option to forward the SR to another user of the application.</td>
</tr>
</tbody>
</table>
Composing Messages
Click the **Messages** icon on the left to open the page. You can compose the following types of messages for an SR.

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Entry</td>
<td>Customer entries capture the information that the customers provide to explain their service problem or question. Depending on the input channel, this information is written directly by the customer, or transcribed by the agent while interacting with the customer.</td>
</tr>
<tr>
<td>Forward</td>
<td>You can forward a customer response or query to any other user of the application through web, email, or phone.</td>
</tr>
<tr>
<td>Internal Note</td>
<td>SR owners can use internal notes to communicate with other team members who have access to the SR.</td>
</tr>
<tr>
<td>Response</td>
<td>You can compose a response message to communicate with the SR contacts. You can send the response to the contact in an email template, or post it to another channel through an application programming interface (API).</td>
</tr>
</tbody>
</table>

Creating Contacts
To add the SR contacts, proceed as follows:

1. Click the **Contacts** icon on the left to open the page.
2. Click the **Add Contacts** button.
3. If relevant contacts exist in the database, then enter the search criteria, and select one or more contacts to associate with the SR. Click **Apply** to add them to the list of contacts.
4. If relevant contacts do not exist in the database yet, click **Add Contact** and then click **Create Contact** to create and a contact. For more information about creating a contact, see Oracle Sales Cloud Using Sales Guide.
5. After adding the required contacts, click **OK** to return to the SR page.

**Note:** You can make one of the contacts the primary contact by clicking the contact under Primary. You can change the primary contact by clicking a different contact under Primary, but you cannot delete a primary contact. The **Delete** option is disabled for the primary contact.

Creating a Team
To create the SR team, click the **Team** icon on the left, and in the Team Members area, click **Add Team Members** to search and add team members.

Creating Activities
Click the **Activities** icon on the left to create an appointment, create a task, or log a call from the Activities page. For more information about activities, see Oracle Sales Cloud Using Sales Guide.
Using Oracle Social Network to Collaborate with Other Resources

Click the Social icon to collaborate on Oracle Social Network with other resources regarding the SR through conversations and sharing documents. You can start a new conversation or click the menu to select one of the options such as mark a conversation or create a user group.

**Note:** To allow access to the Oracle Social Network, the application administrator must enable the service request object sharing on the Oracle Social Network. The administrator can enable this object sharing through the Manage Oracle Social Network Objects in the setup tasks.

When you create an SR, on clicking the Social tab, you see the Share button that you must click to make it available on Oracle Social Network.

If you open an SR that is shared to Oracle Social Network by another user, on clicking the Social tab, you see the Join button. Click this button to join the conversation. Once you Join, the existing conversations become visible. When an SR is shared, updates about the SR are displayed on the conversation wall.

To start a new Oracle Social Network conversation about the SR, proceed as follows: open Oracle Social Network and click New Conversation. On the Create New Conversation dialog box, enter a conversation name and add the required members to it, and click OK. The new conversation appears in the list of conversations. For more information on using Oracle Social Network, see the Oracle Cloud Using Oracle Social Network guide.

Viewing Linked Articles

Click the Linked Articles icon to view the knowledge articles that are linked to the SR. Linked articles are visible only if the administrator has configured and enabled the Knowledge feature.

Creating Service Requests for Partners: Explained

You can create service requests to capture and resolve issues reported by your partner accounts. This procedure assumes that you have implemented the partner service request process using the standard roles: partner sales representative, customer service representative, and channel account manager.

A partner SR has the following limitations:

- You can't add partner resources to the SR Team.
- You can't assign the SR to a partner resource.
- You can't use a single SR to communicate to both a customer and a partner.

To create a partner SR, you can do one of the following:

- Select Service Requests from the Navigator menu. On the Service Requests list page, click Create Service Request.
- On the Partner Overview page, select Service Requests, and click Create Service Request on the Service Requests tab.

Creating and editing a service request for a partner contains the following steps:

- Entering summary information
- (Optional) Composing messages
• (Optional) Adding contacts
• (Optional) Creating a team
• (Optional) Creating activities
• (Optional) Viewing linked articles

Note: External resources (partner sales representatives or partner contacts) can only view the Summary and Messages tab. Access to all other SR subtabs is provided only to the internal resources (customer service representative or channel account manager) who work on the SR.

Entering Summary Information

The summary details for your service request capture the basic information required for the service teams to understand the problem. The administrator must configure the layout of this form to include partner-specific fields. For more information about this configuration, see Setting up Partner Service Requests.

While some of the fields are self-explanatory, you must know the following.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Select the product group or product associated with the SR.</td>
</tr>
<tr>
<td>Partner Account</td>
<td>For a partner user, the Partner Account field is set by default to the account that the user represents. If this field is not already set, select a partner from the list. This field is mandatory.</td>
</tr>
<tr>
<td>Primary Contact</td>
<td>When you associate a partner account with the SR, the Primary Contact field is the partner contact associated with the partner account. If this field isn’t automatically set, then search and select a partner contact.</td>
</tr>
<tr>
<td>Severity</td>
<td>Indicates the severity of the problem.</td>
</tr>
<tr>
<td>Critical</td>
<td>Select this option to include the service request in the reporting metric about critical SRs. It doesn’t affect the service request resolution.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates whether the SR status is new, in progress, resolved, or waiting. When you create a new SR, the status is set to New. When editing an SR, you can change the status only if you have the Status Update privilege assigned to your role.</td>
</tr>
<tr>
<td>Problem Description</td>
<td>Enter a description for the problem.</td>
</tr>
</tbody>
</table>

When you start creating an SR, the Create Service Request page displays three buttons: Save and Continue, Save and Close, and Cancel; once you enter a title and save the SR, or open an SR for editing, the page also displays the Actions menu. Use these options as follows.
### Composing Messages

Click the **Messages** icon on the left to open and view the messages in an SR.

You can send and receive attachments with the primary contact in the Customer Entry and Response messages. The partner contact can include an attachment with a Customer Entry message, and that attachment is visible to the internal resource. The internal resource can also share an attachment with the partner contact, by including the attachment in her Response message.

> **Note:** The Customer Entry and Response messages are read-only for external partner roles.

The following table describes the types of messages that you can compose for an SR.

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Entry</td>
<td>In a partner SR, the Partner Account is the customer. Customer entries capture the information that the customers provide to explain their service problem or question. Depending on the input channel, this information might be written directly by the customer, or transcribed by the agent while interacting with the customer.</td>
</tr>
<tr>
<td>Forward</td>
<td>You can forward a note to any other user of the application through one of the two following options:</td>
</tr>
<tr>
<td></td>
<td>• Send an e-mail notification.</td>
</tr>
<tr>
<td></td>
<td>• Post a note to the SR message history.</td>
</tr>
<tr>
<td>Internal Note</td>
<td>SR owners can use internal notes to communicate with other team members who have access to the SR.</td>
</tr>
<tr>
<td>Response</td>
<td>You can compose a response message to communicate with the SR contacts. You can send the response to the contact in an e-mail template, or post it to another channel through an Application Programming Interface (API).</td>
</tr>
</tbody>
</table>
Creating Contacts
You must create a partner contact only from the **Partners Administration** user interface. Don’t create a partner contact from the **Create Service Request** page. For more information about creating a contact, see Oracle Sales Cloud Implementing Sales Guide.

Creating a Team
This tab is available only to users with the View Service Request Team permission. To create the SR team, do the following.

1. On the Edit Service Request page, click the **Team** icon on the left.
2. In the Team Members tab, click **Add Team Members**.
3. Search for and add team members to the team.

Creating Activities
This tab is available only to the internal resources with the View Service Request Team permissions. Click the **Activities** icon on the left to create an appointment, create a task, or log a call from the Activities page. For more information about activities, see Oracle Sales Cloud Implementing Sales Guide.

Viewing Linked Articles
Click the Linked Articles icon to view the knowledge articles that are linked to the SR. Linked articles are visible only if the administrator has configured and enabled the Knowledge feature. To view the linked articles, you must have the permissions to view knowledge within a service request.

FAQs

**How can I assign a service request to a queue?**

You can assign a service request (SR) to a queue in the following ways:

- Open an SR, and from the user interface set the **Queue** field manually using the queue drop-down list.
- Set up the Assignment Manager rules and create a schedule that runs the rules, and automatically assigns a queue each time an SR is created or updated. For more information, see Configuring Assignment Manager for Service Requests.
- Open an SR and select **Run Queue Assignment** from the Actions menu. This step immediately runs the assignment manager rules.

⚠️ **Note:** If the Assignment Manager rules have not been defined or if the selected SR doesn’t satisfy any active rule, then the **Queue** field is unchanged.
3 Using Knowledge with Service Requests

Linking Knowledge to an SR: Explained

A knowledge base of articles is available to help solve SR issues. While editing an SR, you can search for, and link related articles from the knowledge base. To access the knowledge base, click the arrow to the right of the SR and select the Knowledge tab. After linking an article to an SR, you can then insert the article into SR communications.

Linking Articles

To link an article to a service request, follow the steps below.

1. In edit mode, open the Knowledge tab by clicking the arrow to the right of the SR.
   The Knowledge tab opens with a list of recommended articles. These articles are sourced from an automatic search based on the title of the SR and the product listed in the SR (if applicable). You can remove the product filter by clicking the check mark icon next to the product listed in the tab.

2. Click the Add icon next to the article title in the Knowledge tab to select the article you want to link to the SR.
   If you find an article that you think you will use again, save search time in the future by making an article a personal favorite. To do this, click the Star icon next to the article name in the Knowledge tab. You can see all your favorites in the Favorites section of the Knowledge tab.

3. After linking articles, click Save to save the SR.
   You must save the SR after you have linked an article, or it will not appear when you try to insert the article into an SR message.

Searching Articles

If you don’t see the article you want in the Recommended Articles section, you can search the knowledge base for other articles.

To search for additional articles:

1. Expand the Search area in the Knowledge tab.
2. Enter the search criterion and click the Search icon.

Viewing Article Contents

To view the contents of an article:

1. To see the contents of an article, click the article name.
   A new window opens where you can view the article contents.
2. You can continue scrolling through content of all the recommended articles, or use Show to switch from Recommended Articles to your Favorites. You can also view search results from another search.
Viewing Linked Articles

To view articles that are linked to an SR:

1. Click the **Linked Articles** tab to the left of the body of the SR.
   - The **Linked Articles** window displays all articles linked to the SR.
2. You can delete linked articles by clicking the **Delete** icon to the right of the article to remove the link.

Inserting Knowledge into SR Messages: Explained

Once an article is linked to an SR, you can insert the article into an SR message.

Inserting Articles

To insert articles into SR messages:

1. Open the SR in **Edit** mode.
2. Click the **Messages** tab.
3. Select the message type you want to send from the **Compose** action menu.
4. Complete the message form with what is required.
5. Click the **Insert Knowledge** button to open the **Insert Knowledge** window. Articles that are linked to the SR appear.
   - If you do not see linked articles, the SR may not have been saved after you attempted to link articles. If this is the case, return to the **Knowledge** tab, link the article you want, and save the SR.
6. Click the **Insert as Text** link to insert the article to the SR. The **Insert Knowledge** window closes.
7. Edit the article text if needed.
8. **Send** the message, or click **Save to Draft** to return to the message later.

FAQs

*How can I make a knowledge article a favorite?*

You can favorite articles to make them easier for you to access without having to search for them each time you need them. While editing an SR, you can add your favorite by searching for the article in the **Knowledge** tab. Click the **Star** icon next to your favorite. Your favorite articles are saved as your personal favorites and can be accessed when you expand the **Favorites** section on the **Knowledge** tab.
4 Using Knowledge Authoring

Knowledge Authoring: Explained

Authorized users can use Knowledge Authoring to create and manage content for your knowledge base. 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 base articles to easily find solutions to customer issues and link articles to customer incidents. To access Knowledge Authoring, select **Authoring** under **Knowledge** in the Navigator panel.

Authoring Page

The Authoring page contains options for creating and managing articles. Authorized users can access additional features for managing users, managing the repository, and managing batch jobs.

Content Types

Content types are the types of articles that you can create in your knowledge base. Each content type consists of defined fields that you use to create the article’s contents. Content types also define important metadata about each article that is also stored in the knowledge base.

You can create the following types of articles:

- FAQ
- Solution

Knowledge Articles: Explained

Articles are the basic units of the knowledge base. You can create and manage FAQs and solutions within the knowledge base, periodically update them, translate them into supported locales, unpublish them to remove them from use, and delete them when they’re no longer needed. Agents can use knowledge base articles to find solutions to customer issues and link articles to customer incidents.

About Articles

Articles are the basic units of the knowledge base.

You can create the following types of articles:

- FAQ
- Solutions

The articles list displays the following information for each article:

- Whether the article is a master document (original article) or a translated document.
- The article ID and master identifier (short description that applies to master documents and their translations).
• Publishing status.
• Article version.
• The user who last updated the article.
• The date that the article was last updated.

You can select an article to view details about its publishing status, relevant products and categories, and other information.

Filter and Sort Articles List
You can filter the list of articles on the Authoring page to narrow the list of articles.

To filter the list:
1. Select a menu to filter by:
   ◦ Article status or properties
   ◦ Locale
2. Select the value that you want to apply to the list.

To sort the list:
1. Select whether to sort the list in ascending or descending order.
2. Select the article property that you want to sort by.

Article Publishing Statuses
The article list provides the publishing status of each article.

Articles can have the following statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live</td>
<td>The article is published and available to all users who have privileges to view it. Only one version of an article, for each locale, can be active at any one time. The status includes the version of the article that is currently active.</td>
</tr>
<tr>
<td>Unpublished</td>
<td>The article has not yet been published, or it has been removed from publication.</td>
</tr>
</tbody>
</table>

Article Properties
When you view the details of an article, you can select to view the article’s properties.

Articles can have the following properties.

<table>
<thead>
<tr>
<th>Property</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displayed Version</td>
<td>The version of the article that you are currently viewing.</td>
</tr>
<tr>
<td>Live Version</td>
<td>The version of the article that is currently published. This version may be different from the one you're viewing.</td>
</tr>
</tbody>
</table>
Article Information
When you view the details of an article, you can select to view the article’s information.

Articles have the following information.

<table>
<thead>
<tr>
<th>Information</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>The user who creates an article automatically becomes the article’s owner. Authorized users and administrators can change the owner.</td>
</tr>
<tr>
<td>Created</td>
<td>The user who created the article and the date on which it was created.</td>
</tr>
<tr>
<td>Last Modified</td>
<td>The user who last updated the article and the date on which it was last updated.</td>
</tr>
</tbody>
</table>

Creating and Edit Articles: Procedure
You can create articles, and edit existing articles in the knowledge base. When you edit an article and save your changes, you have the option of saving the article as a draft, publishing the article, or saving the article as a new article.

Creating an Article
You create articles by selecting the appropriate content type and completing the content and metadata fields.

To create an article:
1. Click the Content tab on the Authoring page.
2. Select Add under the type of article that you want to create.
3. Complete the fields for the selected article on the Add FAQ or Add Solution page.

Selecting the Content Type
Content types are the types of articles that you can create in your knowledge base. Each content type contains defined fields that you use to create the article’s contents. Content types also define important metadata about each article that is also stored in the knowledge base.

You can select one of the following content types to create an article:

- FAQ
Creating an FAQ

FAQs (frequently asked questions) include a summary statement, a question, and an answer. You can use the Authoring text editor to format the information in each section. You can also add categories and products to the FAQ to help users find information related to specific categories and products.

To create an FAQ:

1. Select Add under FAQ.
2. Enter the FAQ content.
   - Enter a summary statement or title.
   - Enter the question that the FAQ addresses.
   - Enter the answer to the question.
3. Add categories and products to the article as needed.
4. Select one of the following options:
   - Save and Publish Document to publish the article.
   - Save Document to close the article and save it as an unpublished draft.
   - Save and Continue Editing to save your work and continue editing the article.
   - Cancel to discard the draft FAQ. No article is created.

Creating a Solution

Solutions are articles that provide detailed information about a specific issue that may affect customers. Solutions consist of a summary statement, an issue, a resolution, and information about the environment and the cause. You can use the Authoring text editor to format the information in each section. You can also add categories and products to the FAQ to help users find information related to specific categories and products.

To create a solution:

1. Select Add under Solution.
2. Enter the solution content.
   - Enter a summary statement or title.
   - Describe the issue.
   - Provide information about the environment in which the issue occurs.
   - Provide information about the cause of the issue.
3. Select one of the following options:
   - Save and Publish Document to publish the article.
   - Save Document to close the article and save it as an unpublished draft.
   - Save and Continue Editing to save your work and continue editing the article.
   - Cancel to delete the draft solution. No article is created.
Adding Categories to an Article

Categories enable you to organize articles by any characteristic or business requirement, such as billing or warranty information, so that you can manage and present related articles consistently. You can add categories to articles to make them more visible to users who are interested in specific types, or categories, of information. You can add multiple categories to an article. Users can filter search results and browse lists of articles by category.

If there are more than 100 categories, use the search field to locate categories of interest.

Adding Products to an Article

You can add products to articles to make them more immediately visible to users who are interested in specific information about specific products. You can add multiple categories to an article. Users can filter search results and browse lists of articles by product.

To add a product to an article:

1. Select the product from Available Products.
2. Select Add to move the product to Selected Products.

If there are more than 100 products, use the search field to locate categories of interest.

Editing an Article

You edit articles by selecting the article and updating the content and metadata fields as needed.

To edit an article:

1. Select the article from the list.
2. Edit the article content and properties.
3. Select one of the following:
   - Save Document to close the article and save it as an unpublished draft.
   - Save and Publish Document to publish the article.
   - Save and Continue Editing to save your work and continue editing the article.
   - Cancel to discard your changes.

When you save an article as an unpublished draft, the article version is updated as a fraction, for example: When you save and publish an article, the version number is updated as an integer, for example from version 1.0 to version 2.0.

Article Versions: Explained

Knowledge 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 1.0. Each subsequent update to an article results in a major version increment, for example, 1.0 to 2.0. When you translate an article, the initial translated version is designated as version 1.0, regardless of the version number of the master (original) article.
Comparing Two Versions of an Article

You can compare a selected version of an article to any other versions of the same article. You compare article versions by selecting the version of interest, then selecting the version to compare it to in a parallel view.

To compare an article to a previous version:

1. Open the article that you want to compare. You can open a previous version of an article by selecting History in the information section of the article.
2. Select Side by Side View in the information section.

The Side by Side View page displays the article you selected, and the latest alternate version of the article. You can use the menu to compare other versions.

Publishing Articles

You can publish articles that you are creating or editing at the same time that you save the completed article. You can also publish a saved draft from the article view page.

To publish an article when creating or editing, select the Save and Publish Document option.

To publish a previously saved draft article, open the article details, then select Publish This Version in the article’s Properties.

Unpublishing Articles

When an article is unpublished, it is removed from search results and browse lists. The article and its history are maintained in the knowledge base.

To unpublish an article, open the article details, then select Unpublish this Version in the article's properties.

Translating Articles: Procedure

You can translate articles to any locale that is supported in the knowledge base. When you translate an article, the application creates the translated article as a new article in the knowledge base, and designates the new article as version 1.0. The knowledge base maintains a relationship between the translated article and the original article, or master document.

Translating an Article

You can translate articles to any supported locale that you have privileges to create content in.

To translate an article:

1. Open the article details, then select the locale that you want to translate to in the article's Translate area.
2. Enter the translated content in the new article template. You can select **Copy All from Source** to copy the contents of the original article into the new translation.

3. Save the article as a draft, or publish the article.

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**Manage Knowledge Users: Explained**

Authorized users can access the **Authoring Users** tab to list Knowledge users, review their statuses, and set user content locales. Knowledge users are defined during the setup of the application. User statuses can be active, inactive, locked, or imported.

**Managing Knowledge Users**

You can view details for a selected user, including status, user interface locale, security role, which governs the content that they have access to and the actions they can perform, and the locales that they have access to. You can edit a user’s content locales by selecting **Edit User** in the **User Properties** panel.

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**Administer Knowledge: Explained**

Authorized users can access the **Repository and Tools** tabs to view and manage information about users, the repository, categories and products, content types, and batch jobs, including the supported locales for the knowledge base and user content locales.

**Managing Knowledge Repository and Locales**

The repository contains the knowledge base content and associated metadata. You can view repository properties, categories, products, and content types that are available in the knowledge base. You can also manage content locales.

**Managing Content Locales**

You can manage the locales that the knowledge base supports on under repository properties. Locales are a combination of a language and the country or region in which the language is spoken. Locales provide more accurate support for languages that can vary in usage and meaning in different countries and regions, such as English in the United States compared with English in Australia.

A repository has a default locale. When you create an article or other knowledge base item, the application creates the article or item in the default locale unless you choose a different supported locale. You can add support for additional locales by selecting them on the repository properties page.

**Viewing Knowledge Batch Job Statuses**

You can view the status of Knowledge batch jobs in the **Authoring Tools** tab. The **Batch Job List** shows whether jobs are currently active, and the date they were last executed. You can select a job to view its history.