Oracle CX Service

Implementing Knowledge Management

22B
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## Get Help

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## Implement Knowledge Users

1. Manage Knowledge Users
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
Use help icons Help icon to access help in the application. 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.

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

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

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

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

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

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

Thanks for helping us improve our user assistance!
# 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.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle CX Service Administering Knowledge Management</td>
<td>Describes how administrators can perform ongoing knowledge management operations and maintenance tasks.</td>
</tr>
<tr>
<td>Oracle CX Service Using Knowledge Management</td>
<td>Describes how to use knowledge management components and features.</td>
</tr>
<tr>
<td>Oracle CX Service Implementing B2B Service</td>
<td>Describes how to set up service components and features.</td>
</tr>
<tr>
<td>Oracle CX Sales Implementing Sales</td>
<td>Describes how to set up and configure sales components and features.</td>
</tr>
<tr>
<td>Oracle CX Service Using B2B Service</td>
<td>Describes how to use service components and features.</td>
</tr>
<tr>
<td>Oracle CX Sales Using Sales</td>
<td>Describes how sales managers, salespeople, and other sales users can use sales components and features in their business.</td>
</tr>
<tr>
<td>Oracle CX Sales Creating and Administering Analytics</td>
<td>Describes how administrators can build and edit analytics.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Using Common Features</td>
<td>Provides information on how to use features that are common across Oracle Application Cloud.</td>
</tr>
</tbody>
</table>

## 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.

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

When you enable Knowledge features by setting profile options in the setup and maintenance area, you may see profile options that are not mentioned in any of the setup topics. These options have `CSO_NOTIFICATIONS` in their option code (for example, `CSO_NOTIFICATIONS_EXPIRED`). They are inactive, and do not 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 B2B Service guide.
Enable Knowledge Features

Enable Knowledge in Service Requests

You must set up knowledge such that agents can access and use knowledge articles in service requests. You must have the Sales Administrator or Service Administrator role to enable this feature.

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:
   - To enable filtering of knowledge panel search results and recommended answers by category, set CSO_ENABLE_CATEGORY_FILTER to Yes.
   - To enable agents to maintain a list of their favorite articles in the knowledge panel, set CSO_ENABLE_KNOWLEDGE_FAVORITING to Yes.
   - To enable agents to link articles to service requests, set CSO_ENABLE_KNOWLEDGE_LINKING to Yes.
   - To enable agents to filter search results by locale, set CSO_ENABLE_LOCALE_FILTER to Yes.
   - To enable the filtering of knowledge panel search results and recommended answers by product, set CSO_ENABLE_PRODUCT_FILTER to Yes.
   - 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.
   - To enable the application to add product concepts to the dictionary automatically, set CSO_ENABLE_AUTO_PRODUCT_CONCEPT_GENERATION to Yes.

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.

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

Schedule Knowledge Processes

You must schedule 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 the Knowledge Content Batch Process job to run only once per day. Running this job more frequently is not recommended.
- Knowledge Search Batch Process: This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes.

Scheduled processes are visible only to the user who creates them. You need the SVC_SCHEDULE_SERVICE_JOBS_PRIV authorization to schedule Knowledge processes.

1. Sign in to the application as an administrator.
2. From the navigator, select Scheduled Processes, then on the next page, click Schedule New Process.
3. In the Schedule New Process dialog box, select Job as the process type.
4. In the Name menu, click Search to open the Search and Select: Name dialog box, then enter Knowledge.
5. Select the process you want to schedule and click OK.
6. Click OK in the Schedule New Process dialog box to go to the Process Details page for the job.
7. Click Process Options, choose the options you want, and click OK to return to the Process Details page.
8. Click Advanced and select Using a schedule.
   - For the Knowledge Content Batch Process, specify the frequency as Daily, Every 1 Day. Specify a valid start date.
   - For the Knowledge Search Batch Process, specify the frequency as Hourly/Minute, Every 0 Hours, 15 Minutes. Specify a valid start date.

Enable Intelligent Advisor Interviews in Knowledge Articles

You can integrate CX Sales 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.

You can learn more about integrating CX Sales with Intelligent Advisor by reading the "Intelligent Advisor" section of the Oracle CX Sales Implementing Sales guide.

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
Implement Locales

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
- Available Locales
- Enable Locales
- Set the Default Locale
- Preferred Locales for Users

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:

<table>
<thead>
<tr>
<th>Language</th>
<th>Territories</th>
<th>Locales</th>
<th>Display Name</th>
</tr>
</thead>
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<td>Arabic - Egypt</td>
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## 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 check box of the locale that you want to enable.

### Table of Locales

<table>
<thead>
<tr>
<th>Language</th>
<th>Territories</th>
<th>Locales</th>
<th>Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slovak</td>
<td>Slovakia</td>
<td>sk-SK</td>
<td>Slovak - Slovakia</td>
</tr>
<tr>
<td>Spanish</td>
<td>Mexico</td>
<td>es-MX</td>
<td>Spanish - Mexico</td>
</tr>
<tr>
<td></td>
<td>Spain</td>
<td>es-ES</td>
<td>Spanish - Spain</td>
</tr>
<tr>
<td></td>
<td>Argentina</td>
<td>es-AR</td>
<td>Spanish - Argentina</td>
</tr>
<tr>
<td></td>
<td>Chile</td>
<td>es-CL</td>
<td>Spanish - Chile</td>
</tr>
<tr>
<td></td>
<td>Colombia</td>
<td>es-CO</td>
<td>Spanish - Colombia</td>
</tr>
<tr>
<td></td>
<td>Costa Rica</td>
<td>es-CR</td>
<td>Spanish - Costa Rica</td>
</tr>
<tr>
<td></td>
<td>Ecuador</td>
<td>es-EC</td>
<td>Spanish - Ecuador</td>
</tr>
<tr>
<td></td>
<td>El-Salvador</td>
<td>es-SV</td>
<td>Spanish - El-Salvador</td>
</tr>
<tr>
<td></td>
<td>Guatemala</td>
<td>es-GT</td>
<td>Spanish - Guatemala</td>
</tr>
<tr>
<td></td>
<td>Honduras</td>
<td>es-HN</td>
<td>Spanish - Honduras</td>
</tr>
<tr>
<td></td>
<td>Nicaragua</td>
<td>es-NI</td>
<td>Spanish - Nicaragua</td>
</tr>
<tr>
<td></td>
<td>Panama</td>
<td>es-PA</td>
<td>Spanish - Panama</td>
</tr>
<tr>
<td></td>
<td>Peru</td>
<td>es-PE</td>
<td>Spanish - Peru</td>
</tr>
<tr>
<td></td>
<td>Puerto Rico</td>
<td>es-PR</td>
<td>Spanish - Puerto Rico</td>
</tr>
<tr>
<td></td>
<td>United States</td>
<td>es-US</td>
<td>Spanish - United States</td>
</tr>
<tr>
<td></td>
<td>Venezuela</td>
<td>es-VE</td>
<td>Spanish - Venezuela</td>
</tr>
<tr>
<td>Swedish</td>
<td>Sweden</td>
<td>sv-SV</td>
<td>Swedish - Sweden</td>
</tr>
<tr>
<td>Thai</td>
<td>Thailand</td>
<td>th-TH</td>
<td>Thai - Thailand</td>
</tr>
<tr>
<td>Turkish</td>
<td>Turkey</td>
<td>tr-TR</td>
<td>Turkish - Turkey</td>
</tr>
</tbody>
</table>
You can disable a locale by clearing the check box. When you disable a locale, users cannot 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 of 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 have a Party ID. Service users created in the Manage Users work area are automatically assigned the Party ID attribute. Users created in the Security Console do not have a Party ID, and are unable to use knowledge.
• In HCM applications, 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 CX Sales and B2B Service
• Securing HCM

Types of Knowledge Applications

You can set up users to use Knowledge in Service Center, Help Desk, B2B 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 use 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 CX Sales and B2B 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
- Assign Locales to Authors
- Securing CX Sales and B2B Service
- Securing HCM

Predefined Knowledge Roles

There are predefined knowledge roles to help you set up and manage users.

Most organizations use the predefined roles as the basis for defining new roles to meet their specific needs. You can copy, edit, and save your own roles to assign to 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.

B2B Service Knowledge Access Roles

Use these predefined roles as starting points to set up users to access knowledge in a B2B 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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service Representative</td>
<td>• My Knowledge</td>
<td>• Internal Service</td>
<td>B2B Service</td>
</tr>
<tr>
<td></td>
<td>• Knowledge in SRs</td>
<td>• Everyone</td>
<td></td>
</tr>
<tr>
<td>Customer Service Manager</td>
<td>• My Knowledge</td>
<td>• Internal Service</td>
<td>B2B Service</td>
</tr>
</tbody>
</table>
B2B Service Knowledge Authoring Role
Use this predefined role as a starting point to set up knowledge authors who contribute content to a B2B Service knowledge base.

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Self Service User</td>
<td>Knowledge in SRs</td>
<td>Everyone</td>
<td>B2B Service</td>
</tr>
<tr>
<td></td>
<td>Public web channels</td>
<td>Everyone</td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Author - Service</td>
<td>Authoring</td>
<td>Internal Service</td>
<td>B2B Service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Everyone</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resource Help Desk Manager</td>
<td>Authoring</td>
<td>Everyone</td>
<td>HCM</td>
</tr>
<tr>
<td></td>
<td>My Knowledge</td>
<td>Employee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Knowledge in HCM service requests</td>
<td>Internal HCM</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Search - HCM</td>
<td>My Knowledge</td>
<td>Internal HCM</td>
<td>HCM</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Everyone</td>
<td>HCM</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Author - HCM</td>
<td>Authoring</td>
<td>• Everyone</td>
<td>HCM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Employee</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Internal HCM</td>
<td></td>
</tr>
<tr>
<td>Human Resource Help Desk Manager</td>
<td>Authoring</td>
<td>• Everyone</td>
<td>HCM</td>
</tr>
<tr>
<td></td>
<td>• My Knowledge</td>
<td>• Employee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Knowledge in HCM service requests</td>
<td>• Internal HCM</td>
<td></td>
</tr>
</tbody>
</table>

**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 B2B Service and HCM knowledge applications.

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Locations</th>
<th>User Groups</th>
<th>Application Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Manager</td>
<td>• My Knowledge</td>
<td>• Internal Service</td>
<td>HCM and B2B</td>
</tr>
<tr>
<td></td>
<td>• Authoring</td>
<td>• Internal HCM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Knowledge analytics</td>
<td>• Employee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Knowledge setup and maintenance tasks</td>
<td>• Everyone</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• User management</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Public and internal articles</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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 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 CX Sales and B2B 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
- Assign Locales to Authors

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.

User Groups

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

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

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

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

Related Topics
- Implement User Groups
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.

Implement User Groups

You can use both predefined user groups and user groups that you create. In either case, you need to do a few things to make them work properly in your application.

In security model terms, a user group is like a privilege, which you define in a data security policy 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 steps to set up a user group:

- Create a new role.
- Add a department data security policy.
- Add a user group data security policy.
- Assign the role to users.

**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.

In this example, we'll create a new HCM Employee role by copying an existing role, give that role access to the Employee user group, the HR Helpdesk application, and the HCM department within knowledge, and assign users to it.

First, we'll do these steps to create the HCM Employee role:

2. Choose Create.
3. Enter the name HCM Employee.

Then we'll add a user group data security policy to the role:

1. Go to the Data Security Policies page in the HCM Employee role.
2. Click Create Data Security Policy.
3. Enter the name HCM_Employee_UG and a description.
4. Locate and select the Employee user group database resource.
5. For Data Set, select Select by instance.
6. In the Actions field, select Access content with User Group.
7. Accept the default role hierarchy and click Next to continue.

Finally, we'll assign users to the HCM Employee duty role:

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.

See Securing CX Sales and B2B Service for additional methods of assigning users to roles, such as performing mass updates and setting up auto-provisioning for roles.

Related Topics
• User Groups

Create a User Group

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.

1. Go to Tools, Setup and Maintenance.
2. Select the **Service** offering and select **Knowledge Management**.
3. Select **Manage Knowledge User Groups**.
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. The reference key name can have only capital letters, numbers and underscore.
6. Select a department for the user group. You can’t change the department name after you create the user group.

**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 that:
- grants access to the intended department
- grants access, with a Data Security Policy, to one or more user groups

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

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. Copy 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. Search for and select the database resource for which you’re defining the policy, for example, search for Knowledge User Groups.
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.

### 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 Securing CX Sales and B2B Service for additional methods 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.