B2C Service

Administering Knowledge Advanced

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Preface

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

Using Oracle Applications

To find guides for Oracle Applications, go to the *Oracle Help Center*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Contacting Oracle

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- For guides: *Oracle Service Cloud Documentation Feedback*.
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1 Manage Content

Manage Knowledge Base Content

The content lifecycle can be seen in three basic steps: add, modify, and remove content. Managing your knowledge base requires maintaining fresh and accurate content. This involves a variety of tasks from creating and editing articles, to removing articles or making batch edits on all knowledge base content.

Article Publishing Status

In the course of managing articles in your knowledge base, you may find it necessary to review the publish status of certain articles. Knowledge Advanced displays the article status in list view and detail view.

An article can have a status of Published or Unpublished.

Article Status

Status	Description
Published	The article is published and available to all users who have privileges to view it. Only one version of an article, per locale, can be Live at any one time. The status includes the version of the article that is currently live.
Unpublished	The article has not yet been published, or it has been removed from publication.

When you view the details of an article, you can view the article properties.

The following table lists and describes the properties associated with the article publishing status.

Article Properties

Property	Description
Displayed	The version of the article that you are currently viewing.
Published	The version of the article that is currently published. This may be a different version than the one you are viewing.
Master Locale	The locale in which this article was created.

Property	Description
Document ID	The article's master identifier.
Products and Categories	The products and categories that the article relates to.

Article Versions

Knowledge Advanced 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 either an initial version of 1.0, unless a workflow has been defined for the content type, in which case the version would be 0.1. Each subsequent update to an article results in a major version increment, for example, 1.0 to 2.0 for content types without a workflow. For content types with a configured workflow, the article increments in minor version numbers for each revision made through the workflow process.

For example, the first revision made to the content results in version 0.2 when the article is saved. 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. You can edit the new localized version within that locale without effecting any version of the original article.

Compare 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.

Use the following procedure to compare versions of an article.

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

   The **Side by Side View** page displays the article you selected, and the latest alternate version of the article. You can use the drop-down menu to compare other versions. You can select **Compare Versions** to view detailed comparison information, including highlighting of content changes and document properties.

Workflows

A workflow process is a sequences of steps, such as creating, editing, translating, reviewing, and approving, that you can define to enforce specific content management procedures for your organization.

A workflow consists of one or more steps. Each step defines a task that is assigned to a user or users, and the task assignment appears in the user's Inbox in Knowledge Advanced. When the task is completed, the user can perform one of the following actions.

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

Each step can optionally include one or more conditions that define a particular criteria and which step to advance to if the article meets that criteria.

You can create multi-step workflow processes to manage publishing lifecycles for each Content Type in your knowledge base.

To create the workflow process, you must perform the following tasks.

- *Add a Workflow*
- *Add Workflow Steps*
- *Define Rejection Steps*
- *Define Conditional Workflow Steps*

Build a Workflow

Plan your workflow in advance by considering all the possible steps in the publishing lifecycle, including creation, editing, translation, publishing, and revision. Review any existing workflows to determine if there are any that meet your requirements.

Related Topics

- Video: Creating a Knowledge Advanced Workflow

Add a Workflow

Use the following procedure to add a workflow.

1. At the Repository tab, select **Workflow, List**.
   The **Workflow Management** page displays.
2. Click **Add Workflow**.
   The **Add Workflow** page displays.
3. Complete the fields described in the Workflow Properties table and select **Save Workflow**.

The following table describes the property fields on the **Add Workflow** page.

Workflow Properties

Property	Description
Name	Enter the name of the workflow process.
Reference Key	Reference Keys are arbitrary text strings used as internal identifiers for the content. They are locale independent; the reference key name does not change for an object supported in multiple locales.

Property	Description
	Select the field and accept the default value supplied by Knowledge Advanced. You can also specify a string to use as an internal identifier.
Manually publish documents after workflow completion	Select this check box to specify that articles require a manual publishing step when the workflow completes. The default is to select this option.

The new workflow appears on the **Workflow Management** page. You define the workflow steps from this page.

Add Workflow Steps

Use the following procedure to add workflow steps.

1. At the **Workflow Management** page, locate the workflow and click the **Steps** link.

   The **Workflow Steps** page displays.
2. Click **Add Workflow Step**.
3. Complete the fields on the **Defining Workflow Properties** page and select **Save Workflow Step**.

   The Workflow Step Properties table follows this procedure and describes the Workflow Step properties.

The new workflow step appears on the **Workflow Steps Properties** page.

Workflow Step Properties

Property	Description
Step Name	Enter the name of the workflow step.
Enable document editing	Select this check box to specify whether to allow authorized users to edit the content of the article when performing this step.
Enable properties editing	Select this check box to specify whether to allow authorized users to edit the article properties when performing this step.
Default queue time for first notification	Enter the number of days that elapse between an article entering this step and Knowledge Advanced sending the initial notification. The default is 30 days.
Second Notification	Enter the number of days that elapse between the initial notification that an article has entered this step and the second notification. The default is 30 days.
Reject Steps	Select one or more workflow steps that content can be returned to in the event that content is rejected by an authorized user.

Define Rejection Steps

Rejection steps enable content supervisors to reject a new record or changes to an existing record. You can define rejection steps in workflow processes that contain more than two steps.

You can designate one or more previous workflow steps as the rejection destination. For example, you can specify that authorized users to the publish step can reject the work back to either the create step or the review step.

1. At the WorkFlow Steps page, select (or add) a workflow step that has at least one preceding step.
2. At **Reject Steps**, select one or more preceding workflow steps as potential rejection destinations.
3. Select **Save Workflow Step** to save your changes.

Define Conditional Workflow Steps

For each workflow step, you can specify one or more conditions and what step the article is to advance to if it meets or does not meet the specified conditions. These conditions map directly to the attributes you can set when creating or editing an article in Knowledge Advanced.

Use the following procedure to set conditions for a step.

1. Select **Workflow Steps** > **Conditions** for the step you to which you want to add a condition.

   The **Workflow Condition List** page appears.
2. Select **Add Workflow Condition**.
3. Complete the fields on the **Workflow Condition Properties** page and select **Save Workflow Condition** to save your changes.

   The Conditional Workflow Step Properties table follows this procedure and lists the conditional workflow step properties and describes the input for each property.

   The new condition displays on the **Workflow Condition List**.

The following table lists the conditional workflow step properties and describes the input for each property.

Conditional Workflow Step Properties

Property	Description
Condition Name	Enter the name of the condition.
Advance to step...	Select the step to which the workflow advances the article when the condition is triggered.
if the record...	This defines the criteria under which the condition is triggered. You can trigger the condition under one or more of the following conditions: Contains all of the following - the article must meet all of the specified criteria. Contains any of the following - the article must meet a least one of the specified criterion. Does not contain all of the following - the article cannot meet all of the specified criteria. Does not contain any of the following - the article cannot meet any of the specified criteria.
Document Type Equals	This defines the condition criteria related to translation locales. The article type can be: Any - any type Master Document - an article in its original language Translated Document - an article translated to a language other than its original language

Property	Description
For Any Of The Selected Locales	Select the locale in which the article is written. The **Document Type Equals** and **For Any Of The Selected Locales** settings are independent from each other. For example, if **Document Type Equals** is set to **Translated Document** and **For Any Of The Selected Locales** is set to **English**, then the condition is met if the article is either a Translated Document or has a locale of English.
Repository Views	Select this check box to define a condition based on which views have been established for the article. For example, to establish a condition for articles set for a view called `Knowledgebase`, select the **Knowledgebase** check box and then select the view(s) to define the condition.
Category Conditions	This defines a condition based on which categories have been established for the article. At the **Select Mode** drop-down menu: Select **Navigate** to display the available categories for navigation Select **Search** to display available categories for search. When you select **Search**, you must also enter the search string.
	At **Available Categories**, select one or more content categories or sub-categories to add to your **Selected Categories**. Categories that contain sub-categories display as links preceded by a plus sign (+).
Product Conditions	This defines a condition based on which products have been established for the article At the **Select Mode** drop-down menu: Select **Navigate** to display product and product hierarchies for navigation Select **Search** to display products for search. When you select **Search**, you must also enter the search string.
	At **Available Products**, select one or more products to add to your **Selected Products**. Products that contain sub-products display as links preceded by a plus sign (+).
User Groups Conditions	This defines a condition based on which user groups have been established for the article At the **Select Mode** drop-down menu: Select **Navigate** to display the user groups for navigation Select **Search** to display the user groups for search. When you select **Search**, you must also enter the search string.
	At **Available User Groups**, select one or more user groups to add to your **Selected User Groups**.

Configure Default Subscription Notification Frequency

You can set the the default subscription notification frequency for users. The default setting ensures that users receive an appropriate number of email notifications for their subscriptions. Users can adjust this setting when they subscribe to content. You can set the default to **Never**, **Immediately**, **Daily**, or **Weekly**.

To set the default frequency:

1. Navigate to Tools > System > Configure.
2. Click **Subscription Configuration**.
3. Select the default notification frequency from the menu.

Note: This does not impact current subscribers, just new subscribers.If you want to adjust the notification frequency for current subscribers, use the Subscription Frequency bulk update option.

Related Topics

- Manage Subscriber Notification Frequency

Manage User Subscription Frequency

You can change the frequency for subscriber notifications in batches of users. You can work from the full list of Console or Web users or, use **Find** to narrow the list to your specific criteria.

For example, you can find users whose current subscription frequency is **Daily** and change them all to **Weekly**.

To change subscriber notification frequency:

1. Select **List** under either Console Users or Web Users.

   (Optionally) Select **Find** to locate users matching your specific criteria.
2. Select the users, from the resulting list, that you are changing the subscription frequency for.
3. Select the new frequency for these users from the **Update Subscription Schedule** menu and click **Update Subscription Schedule**.

Notifications

Notifications provide information about Knowledge Advanced processes to users authorized to receive them. Knowledge Advanced notifies content owners about content-related tasks and events such as when an article is due to expire, or article progress within a workflow.

Task Notifications

Task Notification	Description
Workflow Task	Notifies content reviewers and owners that a workflow task is available for action on an article. This notification is used for each workflow step and the action details appear in the article. When the same author both creates and approves an article, a notification is sent.
Translation Task	Notifies content owners and translators when content is scheduled for translation.
Expiring Content	Notifies content owners 7 days before content is due to expire, based on a specified date or time period. Authorized users can specify content expiration as a default time period within the Content Type definition or on an individual record basis.
Workflow Progress	Notifies content owners of content progress within the workflow. **Note:** If the same author both creates and approves an article, this notification is not sent.
Delinquent Workflow	Notifies content owners that a workflow step task is overdue, based on a specified time period (in days). The user can specify the time period while creating the workflow steps. The default queue time for sending notifications is 30 days. For every workflow step, a maximum of two workflow overdue notifications can be sent to the content owner.
Content Review	Notifies content owners 7 days before content is due for review, based on a specified date. Authorized users can specify content reviews as a default time period within the Content Type definition or on an individual record basis.
Recommendation Closed	Notifies users that a recommendation they submitted has been closed.
Recommendation	Notifies content owners that a recommendation has been submitted on an article.
Publish Notification	Notifies content owners of content that has been published. **Note:** If the same author both creates and approves an article, this notification is not sent.
Content Subscription	Notifies content subscribers of updates to articles.
Email Article Link	Notifies recipients that a knowledge answer has been sent to them by another user. It includes the sender's name and email as well as the article title and a link to the article.

Edit Email Notification Templates

You can edit the email notification templates that Knowledge Advanced uses to notify users of recent updates or pending tasks and events.

To edit email notification templates:

1. On the **Tools** tab, click **Configure** under **Tasks and Notifications**.

   Knowledge Advanced displays a list of email notifications.
2. Select the template you want to edit.

   The selected notification template displays.
3. Select or clear the checkbox next to **Enable email notifications for this task** to enable or disable this notification.
4. Enter your content edits.

   You can edit both the plaintext and HTML versions of the notification.

   Each template has a 100 character limit for the subject line and a 25k character limit combined for all fields and keywords in the body.
5. Click **Save Task Configuration**.

   You can restore the default template at any time by selecting **Revert to Default Values**.

   > **Note:** Knowledge Advanced keeps only the latest version of the template and the default version. Any intermediate iterations are NOT saved as versions. If you modify the default and then later make additional edits, only the most recent edits are saved.

Translate a Notification Template

You do not need to translate notification templates for most locales unless you have chosen to edit the default template. Translated default templates are not provided for custom locales.

To translate an email template to another language:

1. On the **Tools** tab, click **Configure** under **Tasks and Notifications**.

   Knowledge Advanced displays a list of email notifications.
2. Select the template you want to edit.

   The selected notification template displays.
3. Select **Translate** under the **Template Legend**.
4. For **Select Source Locale**, choose the source locale from the menu, if it did not default in.
5. For **Select Translation Locale**, choose the locale you are translating the template into.
6. Enter the translated text for the **Subject**, **Plain Text Template**, and **HTML Template**. You can use any of the keywords specified on the previous page under the **Template Legend**.

   For most major languages, you can edit the default translation of the text that displays when you select the translation locale. Custom locales do not have default translations. If a default translation is not available for a

locale, select **Copy All from Source** to bring over the fields and keywords from the template and then replace the source text with your translation.

7. Select **Save and Continue Editing** or **Save and return to the previous page** to save your work.

   You can restore the default values by selecting **Revert to Default Values**.

Add Additional Upload File Types

Knowledge Advanced attachments uploading supports all image file types (bmp, gif, jpg, jpeg, and png) by default. You can configure the following additional file types for authors to upload: flv, mov, mp4, mpeg4, pdf, tif, and wmv.

Before you start

You must have the Content Management activity permission to configure additional upload files types. For more information on Content Management activity permissions, see *Select Content Management Activities*.

Use the following procedure to add upload file types.

Here's what to do

1. Click the **Tools** tab and click **System** > **Configuration** > **File Attachment Configuration**.

   Knowledge Advanced displays the **File Attachment Configuration** page.

2. Click **Override default configuration**.
3. Under **CKFinder Link File Extension Filter**, enter the file extension, separated by commas, for each file type you want to make available to authors when they create articles. For example, enter **bmp,gif,jpeg,jpg,png**.
4. Click **Save**.

   You can also click **Revert to Default Configuration** to restore the default configuration or **Cancel** to return to the previous page without saving your changes.

Choosing an Article Link Format

You can insert an article link using the Answer ID or the Document ID. There are important differences between how these links work in the application.

Authors can add links to other knowledge base articles in their articles. Users can click on the links when viewing articles in customer portal, and in the Search Knowledgebase window in Agent Desktop. Article links are not active in the Agent Desktop Content page, or in the BUI Authoring tool Content page .

Authors can use either an article's Answer ID or its Document ID when they create links. There are important differences in how these links work in the application:

- Answer ID links refer to a specific article in a specific locale. If the article exists in multiple locales, the user sees the article in the locale that you have linked to, which may be different than their preferred locale. You can use the link checker in Service Cloud to find and fix broken Answer ID links.
- Document ID refer to the article in all its locales. Document ID links resolve to the user's preferred locale. The link checker doesn't find broken Document ID links. You must maintain them manually.

You may want to consider a policy for how authors in your organization create article links, so that you can manage them efficiently.

Include External Assets in Articles

Authors can include external assets in articles. Assets are external files, such as multimedia (images/videos), documents such as PDFs, or even code patches or other binary files. Authors can include these external assets using either of these methods:

- Embed the asset inline in an article field.
- Attach the asset so that it appears at the end of the article.

Embedded inline assets are managed in a central asset repository called CKFinder. When authors embed an asset inline, it is stored in the CKFinder repository, which makes it available for other authors to use in their articles. The CKFinder asset library is available only in the CKEditor rich text field toolbar. Authors can find assets that have been uploaded to the library, or upload new assets, and then place them inline in rich text fields.

Authors can also add assets so that they appear outside of the body of an article using the attachment attribute. This method is useful to provide additional content that is suplemental to the main subject of an article. The attachment attribute is available in articles based on their content type configuration. Authors attach assets by choosing and uploading them from their own file systems.

There are some important security differences between embedded assets in CKFinder and attached assets. Assets that are stored in CKFinder and embedded inline in articles do not automatically inherit the access level aspects of the article. Embedded inline asset URLs are publicly available, but their availability has a time limit that you can configure for your organization. Attachments, on the other hand, do inherit the article's overall access level restrictions, and are protected by single sign on (SSO).

Note: Oracle does not recommend using the CKFinder repository for sensitive assets.

Access to Assets Included in Articles

Authors can include images, documents, and other file types inline in articles by embedding assets stored in the CKFinder asset store into rich text article fields. Embedded images are automatically downloaded by the user’s browser and appear in the article page, inline with the text. Other types of assets display differently. For videos, a thumbnail can be shown, and viewing within the context of the article is possible. For documents or other file types, a link appears, and users can download the asset to their desktop for viewing.

To restrict access to embedded assets, the application limits the amount of time for which the asset URL is valid. This time limit applies in case an asset's URL is made publicly available. When a user accesses an asset, the application generates a token that is appended to the URL. The token expires when the configured time period elapses. When the token expires, the URL is no longer valid, and users will see a message that the session token has expired.

Set the Access Time Limit for Assets Included in Articles

You can set the amount of time that images and documents (assets) included in articles will be available to end-users who access them. The application stores these assets in the CKFinder asset store. The default time limit is 60 minutes. You can set the time limit to any value between 1 and 1440 minutes (24 hours).

1. Navigate to Authoring > Tools > System > Configure.
2. Select **File Attachment Configuration**.
3. Locate the **CKFinder Asset Token Expiration** setting.
4. Set the number of minutes for the access time limit.

Enable and Configure Autosave

The autosave feature provides a safeguard against unexpected events that may cause the application to close before you have saved your work. Autosave is enabled by default.

Use this procedure to either disable autosave or adjust the save interval.

> **Note:** Autosave does not save file attachment changes, such as uploading files, attaching files to articles, and removing attached files from articles.

1. Navigate to Authoring > Tools > System > Configuration > Auto Save.
2. Enable or disable the autosave feature by selecting or clearing the check box.
3. Enter the interval, in seconds, for the application to create autosaved files for unsaved articles.

   The default is 30 seconds.

When enabled, Knowledge Advanced displays a list of an author's autosaved articles on the Content tab.

The autosave feature also applies to the side-by-side translation process. Translation process autosaved files also appear in the list of autosaved articles on the Content tab.

Create a Custom Article Template

You can create templates for authors to use when writing articles. You must have Manage Template permissions in the Security Console to create, delete, and view templates.

The templates you create are available for any type of content that includes a rich text field in its definition. For each template, you can upload an image to appear next to the name and description in the template menu. You can create up to 50 templates .

1. Go to Repository, Templates, and click **Add**.

2. Enter the name and description that will appear in the template menu.
   Each template must have a unique name.
3. Upload an image to use as a thumbnail for the template to display in the template menu.
   If you don't provide an image, a generic image will be applied.
4. In the template field, use the tools available to create a template.

Browser-based Spellcheck

Authors can use their preferred browser's spellcheck functionality when they create or edit articles using the authoring console. Browser-based spellcheck enables authors to use spelling correction while they type, which improves the user experience and increases quality and productivity. Browser-based spellcheck is supported by most popular browsers, however, authors may need to configure it before use.

You do not need to enable browser-based spellcheck. It is enabled in Knowledge Advanced by default. You can disable it by changing the setting in Tools > System > Configure > Enable CKEditor Browser Spellcheck.

In a typical browser spellcheck implementation, the browser indicates misspelled words by underlining them as the author types. The author can then right-click on the underlined word in plain text fields, or Ctrl + right-click in rich text fields, to see suggestions for correcting the spelling. If the author selects a suggested word, the browser replaces the misspelled word with the author's selection.

When authors use browser-based spellcheck, the browser, and not the application, provides the functionality, including the dictionary of correctly spelled words. The dictionary that the browser uses is specific to the browser, and will vary from the dictionary that the application provides.

Use Global Find and Replace

Knowledge Advanced provides a global find and replace tool that finds all instances of a word or phrase throughout the Knowledge Advanced content.

Before you start

You must have the Content Management Global Find and Replace activity permission to execute Global Find and Replace operations. For more information on Global Find and Replace permissions, see *Select Content Management Activities*.

> **Note:** You must run each global find and replace job through completion before configuring and running another global find and replace job.

Use the following procedure to find and replace a word or phrase.

Here's what to do

1. On the **Tools** tab, click **Replace** under **Global Find and Replace**.
   Knowledge Advanced displays the **Global Find and Replace** page.
2. Select the **Find** options.

The Global Find Options table follows this procedure and describes the input for each field.

3. Click **Find**.

   Knowledge Advanced displays the **Global Find and Replace Results** page which provides the following details for all found articles.
   - Content Type
   - ID
   - Master Identifier
   - Locale
   - Status
   - Version
   - Workflow

4. Select individual articles to replace the text, or click **Select All**.
5. Click **Continue**.

   Knowledge Advanced displays the **Global Find and Replace Options** page.

6. Select the **Replace** options. The Global Replace Options table follows this procedure and describes the input for each field.
7. Click **Queue Change Request**.

   Knowledge Advanced displays the **Global Find and Replace Request Queue** page where the request can be executed.

8. Click **Start**.

   Knowledge Advanced performs the operation with the selected options.

Results:

You can click the **Start Date** link to view details about an operation. Knowledge Advanced displays the **Global Find and Replace Report Summary** page.

In addition to viewing Global Find and Replace report summaries through Authoring, you can click **Export details to Excel**. The resulting Excel spreadsheet can then be archived, distributed, or printed.

Global Find and Replace operations also appear in the **Content History** of individual articles.

The following table lists the Global Find Options on the **Global Find and Replace** page and describes the input for each field.

Global Find Options

Field	Description
Find	Enter the word or phrase to search for occurrences.
Match Case	Select if you want the system to find occurrences that match only text that has the exact capitalization specified in **Find**. For example, if you enter **START** in **Find** and select **Match Case**, Knowledge Advanced finds only instances of **START** and does not return any occurrences of **Start** or **start**. This

Field	Description
	is particularly useful when a common abbreviation also happens to be a word, as in the preceding example.
Find Whole Words Only	Select to find a specific word, such as **Win**, and to ignore the word when it occurs as part of another word, such as **Windows**.
Locales	Select the locale on which to run this search.
Repository Content Types	Select the content type(s) on which to run this search.
Categories	Select either **Navigate** or **Search** from the Select Mode menu. If you select Search, you are prompted to enter a search string.
Available Categories	Select a category and click **Add** to move it under **Selected Categories**. Then select either **Match All of the Selected Categories** or **Match Any of the Selected Categories** to refine your search.
Products	Select either **Navigate** or **Search** from the Select Mode menu. If you select Search, you are prompted to enter a search string.
Available Products	Select a product and click **Add** to move it under **Selected Products**. Then select either **Match All of the Selected Products** or **Match Any of the Selected Products** to refine your search.
Replace Criteria	In **Replace**, enter the word or phrase with which to replace the **Find** entry.
Retain the Case of Replaced Text	Select to retain the original case of the word or phrase. For example, you enter **utility** in **Find** and **tool** in **Replace** and select this option. If Knowledge Advanced finds an occurrence where **utility** is the first word of a sentence, it replaces it with **Tool** (unless **Match Case** is also selected, in which case Knowledge Advanced would not replace the word but, would note it on the report as found).

The following table lists the Global Replace Options on the **Global Find and Replace** page and describes the input for each field.

Global Replace Options

Option	Description
If document is published before replace, bypass workflow and publish	Select to bypass any workflow steps for currently published articles and automatically republish an article. If selected, note the related notification suppression options. If the word or phrase is found in a published article, the word or phrase is replaced and the revised article is republished. This option does not affect currently unpublished articles.
Suppress subscription notifications	Select to suppress notifications to subscribers to a published article when you select **If document is published before replace, bypass workflow and publish**. Subscribers are not notified that an article has been revised.
Suppress translation requests, tasks, and notifications	Select to suppress translation requests, tasks, and notifications for the selected article(s). Revisions for previously translated articles automatically trigger translation requests and associated tasks and notifications. You can suppress this trigger and handle translations on an individual article basis.
Suppress publish notifications to user	Select to suppress publish notifications to users when you select **If document is published before replace, bypass workflow and publish**.
Queue Change Request	Click to save this request with the selected options and add it to the change request queue.
Back to Find Results	Click to return to the results page without saving options.
Export document list to Excel	Click to export the document list to a Microsoft Excel file.
Cancel	Click to cancel this request.

Available Batch Jobs

Knowledge Advanced uses batch processes to perform system maintenance and generate system notifications. All of these processes run daily except for the Subscription Email job, which uses three separate jobs based on the subscription frequency. Use the **History** link for any batch job on the Batch Job List page to review the job history.

The following table describes the scheduled batch processes.

Batch Processes

Job Name	Description
BULKUPDATE	This job processes bulk updates of content. For example, you might need to unpublish all articles on a specific product that has been discontinued. You would select the necessary articles and set them to unpublish. The articles are removed from customer view with the next daily run of this process.
CleanupJob	This job closes and removes inactive application sessions.
ContactAnonymizeJob	This job locates all references to deleted web users and makes their information anonymous.
ContentExpirationJob (Expiring Content)	This job sends notifications about content with approaching expiration dates.
Delete Closed Task	This job deletes tasks that have been closed for a specified number of days.
Expired Workflow Step	This job finds all content whose workflow step has expired and then sends notifications to the content owner.
ReviewScheduledJob (Content Review)	This job sends notifications about content with review dates approaching.
RNCategorySynchronizerJob (Category and Product Synchronizer)	This job ensures category and product consistency throughout Service Cloud and Knowledge Advanced.
SDP (Start Date Publishing)	This job automatically publishes and unpublishes documents based on their publication start dates.
Shadow Account	This job shadows account users from Service Cloud to Knowledge Advanced.
Subscription Email	This process runs three separate jobs on intervals of 15 minutes, daily, and weekly. Each job sends content subscription email, depending on the frequency that the subscriber or administrator selected.

Modify Articles with Bulk Update

You can perform administrative operations on multiple articles. For example, authorized users can find all articles having a specific owner and change the owner of those articles in one action.

To perform bulk operations, use the list and filtering functionality to generate a list of articles, then select all or some individual articles from the list. When you apply your changes, you have the option to suppress subscriber notifications for the affected articles.

Use Bulk Update

Generate a list using either the Find or List option to perform bulk operations on selected articles simultaneously.

You can manage the following tasks through the bulk update feature.

- Delete all selected articles from the Content Type.
- Publish all selected articles.
- Unpublish all selected articles.
- Request translations for all selected articles.
- Change categories for all selected articles.
- Change product for all selected articles.
- Change views for all selected articles.
- Change the owner of all selected articles.
- Change the start date for all selected articles.
- Change the end date for all selected articles.
- Change the subscription notification frequency for current subscribers.
- Change the user group for all selected articles.

Most bulk update processes do not run immediately. Knowledge Advance stores the job parameters and details to a database table, and a single thread per JVM monitors the table for available jobs. No single JVM attempts to run multiple bulk updates concurrently; however, disparate JVMs may run any single pending jobs. When the number of updated items is greater than 10, the update runs as a bulk process. When the number of updated items is 10 or fewer, the update runs instantly.

Article overlap from newly added jobs (where the same article appears in an already running or pending job) are marked as exceptions, and the log displays an error message, as shown in the following paragraph.

Sample Error message for locked content:

```
 1418185 [TestScheduler_Worker-12] ERROR
com.inquira.services.batchjobs.bulkupdate.ChangeViewsBulkUpdate -
com.inquira.im.exceptions.IMNotUpdateableException: This ContentText
cannot be updated because it is not the latest ContentText or it is
locked by another user AL154
```

Bulk Update Example

Assume that you want to change the owner for all articles modified by Jane Doe to make her the new owner for those articles. To do this, use the following procedure.

1. Find all articles modified by Jane Doe. Set your filter to **All Documents**, then sort on the **Modified By** column.
2. Select all of the articles modified by Jane Doe.
3. From the **Apply these changes** drop-down menu, select **Change Owner** and enter `Jane Doe` as the new owner.
4. Select **Apply**.
5. Select **Bypass workflow and publish**.
6. Optionally, select **Suppress Notifications** to prevent subscribers from being needlessly notified of this change.
7. Select **Apply Changes**.

The update job is added to the Bulk Update Job List queue. Articles currently in workflow are not modified.

View Bulk Update Status Reports

View the **Bulk Update Status Reports** page to cancel bulk updated jobs. You can also view the status of all queued bulk update jobs.

To access the Bulk Update Status Reports page, go to **Content** > **Documents** > **Bulk Update Job List**.

You can view the status of Knowledge Advanced batch jobs in the 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.

You can also use the **Export List to Excel** feature to export the Bulk Update Job List.

2 Manage Content Types

Content Types

Content types are Knowledge Advanced objects that define the various types of articles that exist in your knowledge base. A content type definition serves as an authoring template for an article, and also stores important metadata about knowledge base articles.

You must define at least one content type to contain knowledge base articles. You can define additional content types for any number of article types that have different requirements, such as the following.

- Content elements, such as title, body text areas, and optional product and customer information.
- Workflow processes to enforce a managed sequence of authoring, editing, and approval steps.
- Publishing lifecycle, such as revision tracking, review, and publish dates.
- Display features, such as layout.

Migrate an Existing Knowledge Base

If you have an existing knowledge base and you would like to migrate that content into Knowledge Advanced, you must create specific content types for that content to migrate to.

Before you migrate your knowledge base, create the following content types.

- FAQ - These answers represent frequently asked questions.
- KCS - These answers represent similar content from KSC articles.
- Manual - These answers represent application manuals.
- HTML - These answers represent HTML content. You create an HTML article by entering text in the **Summary**, **Question**, and **Answer** fields on the **Add Content** page.
- URL - These answers represent URLs to external content. You create a URL article by entering the URL of the document that is to be the answer source for the given question in the URL field of the **Add Content** page. It is also important to enter a descriptive **Summary** and **Question** as Knowledge Advanced uses the information in these two fields when conducting internal searches for documents. For customer searches, Knowledge Advanced also indexes the destination URL so it can be searched.
- Attachment - These answers represent standalone documents attached to the answer. To create an attachment article, select the attachment to use from the **Attachment** link on the **Add Content** page.

Note: Content types may vary. As part of the migration planning process, you should identify every content type used in your knowledge base and create a corresponding content type in Knowledge Advanced.

Add a Content Type

You add a content type by specifying the general properties and any optional workflow process. The **Repository Content Type Properties** page contains properties that you use to define basic properties and behavior, such as the name of the article type, or whether articles in the content type will be removed from publication at a specified time.

After you add a content type, you must configure the schema and attributes. See *Specify a Content Type Schema*.

To add a content type, you must perform the following tasks.

- *Add Content Type General Properties*
- *Select Search Indexing Options*
- *Select Display Options*
- *Select Translation Options*
- *Select Workflows*
- *Select Feedback Options*
- *Select Category Options*
- *Select Product Options*
- *Select User Group Options*
- *Select Security Role Privileges*
- *Save Content Type Properties*

Related Topics

- Video: Creating a Knowledge Advanced Content Type

Add Content Type General Properties

The general properties of a content type define the basic elements of the articles it will contain, such as titles, and whether articles in the content type are removed from publication at a specified time.

To add content type general properties:

1. On the Repository tab, select **Content Type** > **Add**.

   The **Repository Content Type Properties** page displays.
2. Complete the fields on the **Repository Content Type Properties** page.

   The following table lists the general properties and describes the input for each property.

   Content Type General Properties

Property	Description/Input
Content Type Name	Enter the name of the content type, for example, Solution or FAQ.

Property	Description/Input
Reference Key	Reference keys are arbitrary text strings used as internal identifiers for the various objects in the system. They are locale independent; the reference key name does not change for an object supported in multiple locales. Select the field and accept the default value supplied by Knowledge Advanced.
Default Lifespan (days)	Enter a default valued for the number of days from the initial publishing date that new articles in this content type remain available on the target web site. Authors and editors can override this number for individual articles. Leave this field empty to specify that articles will never be automatically removed from publishing.
Review Date (days)	Enter a value for the number of days after you create content that the system creates a content review task. You must configure a Content Review scheduled job to create the content review tasks and notification as described in *Batch Processes* . Leave this field empty to specify that documents will not be automatically scheduled for review.
Document ID Prefix	Enter a prefix for the ID number that Authoring automatically assigns to each article. The document ID prefix helps identify articles belonging to a specific content type. You can enter numbers and letters.
Document ID Current Value	Enter a starting value for the incremental ID number that Knowledge Advanced automatically assigns to each article. For example, if you enter 1000 to begin the document ID numbering sequence, the first article's ID number will be 1001. Resetting the current document ID value may result in multiple articles with the same Document ID.
Remove minor versions after publishing	Select this checkbox to specify whether you want Knowledge Advanced to remove minor revisions of the articles when the article is published. Minor revisions are created to track individual workflow steps.
Provide event start and end date attributes	Select this checkbox to specify whether you want articles in this content type to contain start and end date fields. These dates are useful for creating automatically updated event calendars.
Enable Priority/Order	You can use this field in customizations to provide a priority value ranging from 1 to 20 or None for articles of this content type. The priority value is exposed in content-related GET API functions, and can be used in custom applications, for example, to sort documents by priority. **Note:** This value has no effect on Knowledge Advanced search results or browse lists. It is useful only in customizations.

Property	Description/Input
Enable related content	Select this checkbox to specify whether you want to enable additional content association features during the editing process.
Enable Check Out/In	Select this checkbox to specify whether you want to enable a check-out and check-in process for articles in this content type. When check in/out is enabled, multiple users can edit records without creating conflicts.
Enable user activity logging	Select this checkbox to specify whether you want to enable logging of user access information.
Enable Content Recommendations	Select this checkbox to specify whether you want to enable content recommendations for this content type. Content recommendations are special content items that end users can create to enter request for specific content.
Enable HTML Validation	Select this checkbox to specify this option to allow the content type designer to turn off the HTML validation that is performed prior to saving the article. Important: We recommend that you always enable HTML validation; when HTML validation is disabled, user actions, such as copying and pasting text from other applications, can introduce errors that may invalidate the generated XML for an article.

Select Search Indexing Options

Specify to include published, unpublished, or all latest versions of articles in Intelligent Search content processing.

At the **Select document status for indexing by Oracle Knowledge Search** field on the **Repository Content Type Properties** page, select one of the following options.

- **Live**. Specifies to include only published articles in search content processing. Earlier and later draft versions of articles are excluded.
- **Latest Valid Draft**. Specifies to include the latest version of articles in search results, whether they are published or unpublished. This setting will include the latest version of all articles, whether published or unpublished; an unpublished draft will replace an earlier published article in the search index.
- **Live And Latest Valid Draft**. Specifies to include both published and unpublished draft articles. This setting includes the latest version of all articles, whether published or unpublished, and the latest published version; published articles and more recent draft versions of the same article will all be included in the search index.
- **None**. Specifies that no articles of this content type will be indexed.

Select Display Options

You can specify optional headings for the areas of the content pages that display the fields used for authoring content.

- Custom Content Entry Fields Section Name. Specify an optional heading for the section that displays the content fields that authors use when creating content. You can also use the adjacent checkbox to omit the section heading from the display.

- Custom Meta Data Entry Fields Section Name. Specify an optional heading for the section that displays the article meta data. You can also use the adjacent checkbox to omit the section heading from display.

Select Translation Options

You can specify the locales in which Knowledge Advanced will generate automatic translation tasks when master documents are created or updated.

Select locales for automatic translation requests. Select the locales for translation. When a master document is edited, the previous author of a translation can be notified (based on settings in the repository properties).

To select all locales listed, select the **Select All** link.

To unselect all locales listed, select the **Unselect All** link.

Selecting Workflows

Select a workflow for articles in this content type. You must define workflows to make them available for selection. For more information on workflows, see *Workflows*.

At the **Select Workflow** field, select a desired workflow, and select one or more of the following options.

- Products and categories require workflow approval if workflow is enabled.
- Views requires workflow approval if workflow is enabled.
- User Groups requires workflow approval if workflow is enabled.
- Display dates requires workflow approval if workflow is enabled.
- Event dates requires workflow approval if workflow is enabled.
- Restrict content editing to users that can perform the workflow step.

Select Feedback Options

You can select collaboration properties that define the use of ratings forms and discussion boards within the content type. Adding ratings enables a feedback mechanism within all topics and messages on a board.

1. From the **Rating** drop-down menu, select one of the following options.
    - **Rating** to enable ratings feedback.
    - **No Rating** if you do not want ratings feedback.
2. Select **Enable Threaded Discussions** to enable threaded discussion forums in the content type. Threaded discussions are a series of messages that have been posted as replies to each other.
3. Select **Enable Moderate Discussions** to enable moderate discussion forums in the content type. In moderated discussions, a moderator must formally publish messages submitted by end users; these messages will not display on the web site until they are published.

Select Category Options

To associate articles in this content type with one or more categories:

1. From the **Select Mode** drop-down menu, select an option.
    - Select **Navigate** to display the available categories for navigation
    - Select **Search** to display available categories for search. When you select Search, you must also enter the search string.
2. From the **Available Categories** options, select one or more content categories or subcategories to add to your Selected Categories. Categories that contain subcategories appear as links preceded by a plus sign (+).

3. Select **Require authors to select at least one category in addition to the categories marked as "required"** to require authors associate articles with at least one category. If an author creates an article that has no required categories associated with it, this feature requires them to still select at least one category. If an article has required categories marked, authors must select those and one additional category.

Select Product Options

The Product options enable you to associate one or more products with a content type. Select the products for the content type.

1. At the **Select Mode** drop-down menu, select one of the following options.
   - Select **Navigate** to display product and product hierarchies for navigation
   - Select **Search** to display products for search. When you select Search, you must also enter the search string.
2. From **Available Products**, select one or more content categories or sub-categories to add to your Selected Products. Products that contain sub-products display as links preceded by a plus sign (+).
3. Select the **Restrict User Group selection to one group only** to specify that article creators can associate articles with one group only.
   With this feature enabled, an author must create a separate article for each user group who might need it. This could be useful if knowledge base content is geared toward user groups, particularly if content varies between, for example, Users and Service Agents.
   Without this feature, an author can select multiple user groups to which the article applies. This is useful to keep content consistent across user groups. Extending the previous example, one article could be created that speaks to both User and Service Agents and, if necessary, a more technical article could be created about the same topic that is only made available to Service Agents.

Select User Group Options

The User Group options enable you to associate one or more user groups with a content type. User groups represent types of people interacting with your product, often defined by the level of expertise, for example, Customer and Service Agent could be separate user groups, each requiring a different level of knowledge about the product. When associating user groups to content types, you might specify that content type Technical Manual is only available to user group Service Agent while content type User Manual is available to Service Agent and Customer user groups. Select the user groups for the content type.

1. At the **Select Mode** drop-down menu:
   - Select **Navigate** to display the user groups for navigation.
   - Select **Search** to display user groups for search. When you select Search, you must also enter the search string.
2. At **Available User Groups**, select one or more user groups to add to your Selected User Groups.
3. Select **Restrict User Group selection to one group only** to specify that articles creators can associate articles with one group only.
4. Select **Require at least one user group to be selected** to specify that article creators are required to associate articles with at least one user group.

Select Security Role Privileges

Each Knowledge Advanced user is assigned one or more security roles. Each content type specifies security role privileges that define what permissions (view, modify, publish, etc.) are given to which roles.

The Super Admin role can view multiple repositories. The Super Admin role can create Super Support users, but the Super Support role cannot create Super Support users.

To assign the permissions to the Super Admin, select the **Super Admin** check box. The default is all privileges selected. You can unselect any privilege you do not want associated with the Super Admin role.

To apply AQI scoring to articles, select the **View** and **Add AQI** Repository Content Type privileges.

Save Content Type Properties

Select **Save View Properties** after you complete the fields.

The new view appears in the Repository Views list.

To display this list, select **Views** > **List**.

Add URL and Attachment Answer Content Types

URL Answers provide an easy way to create links to web pages as knowledge base answers. These answers represent URLs to external content. You create a URL Answer by entering the URL containing the answer for the given question in the **URL** field of the **Add Article** page.

Attachment Answers provide easy access to documents that can be updated and revised. When users access the answer, they see the latest revision. You create an Attachment Answer by clicking **Attachment** on the **Add Article** page and selecting the documenmt you want to be the source for the answer.

Define the URL Answer Content Type

You can define a URL Answer content type to create a link to a web page as the knowledge base answer.

1. At the **Repository** tab, add a new content type for the URL Answer. You must name the content type **URL_ANSWER**.

   The new content type appears in the list on the **Repository** tab.
2. Select the new **URL_ANSWER** content type and select **Schema**.
3. At the **Schema Properties** page, select **Add Attribute**, enter **Summary** for the attribute name, and complete the required fields.
   a. Enter the attribute name in the **Attribute Name** field and press Tab.

      The **Reference Key** field is automatically populated.
   b. Enter a short description for the attribute in the **Description** field.
   c. Select **Text Field** under **Select Attribute Type**.
4. Select **Save Attribute Properties**.
5. Repeat steps 3 through 4 to create and save another text field attribute named **URL**.
6. After adding the two attributes, select **Save attribute**.

Results:

The URL answer content type has been added to your knowledge base.

> **Note:** Rating options are disabled for the URL Answer content type because end users never visit the answer page. Answers open the URL directly.

Define the Attachment Answer Content Type

You can define an Attachment Answer content type to access a seperate document as a knowledge base answer.

1. At the **Repository** tab, add a new content type for the Attachment Answer. You must name the content type **ATTACHMENT_ANSWER**.

   The new content type appears in the list on the **Repository** tab.
2. Select the new **ATTACHMENT_ANSWER** content type and select **Schema**.
3. At the **Schema Properties** page, select **Add Attribute**, enter **Summary** for the attribute name, and complete the required fields.
   a. Enter the attribute name in the **Attribute Name** field and press Tab.

      The **Reference Key** field is automatically populated.
   b. Enter a short description for the attribute in the **Description** field.
   c. Select **Text Field** under **Select Attribute Type**.
4. Select **Save Attribute Properties**.
5. Repeat steps 3 through 4 to create and save another text field attribute named **Attachment**.
6. After adding the two attributes, select **Save attribute**.

Results:

The Attachment answer content type has been added to your knowledge base.

> **Note:** Rating options are disabled for the Attachment Answer content type because end users never visit the answer page.

Modify a Content Type

To modify a content type:

1. Select **Content Types** > **List** and select the content type you want to modify.

   The Repository Content Type Properties screen appears.
2. Make your changes to the properties and then select **Save View Properties**.

Specify a Content Type Schema

After you have defined the general parameters for a content type, you must define the structure of the articles within a content type by defining and applying content type schema. You can specify whether the various content fields that you define are required or optional for content authors.

You should review *Content Type Schema Nodes and Attributes* before continuing with the tasks below.

To specify a content type schema, perform the following tasks.

- *Create Content Type Schema*
- *Add Content Type Schema Nodes*

- *Add Content Type Schema Attributes*
- *Content Type Attributes*
- *Specify User Group Restrictions for a Content Type Schema Attribute*

Note: You can also define content metadata fields to store information about the article that is independent of its subject matter. For more information, see *Specifying Content Metadata*.

Content Type Schema Nodes and Attributes

Define the content structure of your articles by specifying nodes and attributes. The nodes and attributes define the content fields within the article template for the content type.

An attribute is an individual item, such as an article title. A node is a heading for one or more attributes, such as author's name, user ID, and department. (In database terms, attributes are columns in a database table, whereas nodes are 1-M related tables.)

Nodes provide a convenient method of grouping together attributes that have some common characteristic. For example, a Contributors node might group together attribute fields to store information about various authors and editors who contributed to an article. Each node might contain attributes for the name, user ID, and department of a contributor. You can allow multiple copies of a node to store information about multiple contributors to articles.

Note: You can define a complex hierarchy of nodes and attributes to reflect virtually any type of data structure; however, Oracle recommends using simple data schema to make it easier for content providers to manage information.

Create Content Type Schema

Use the following procedure to create schema for content types.

1. Select **Content Types** > **List** .

   The Repository Content Type page displays, listing the defined content types.
2. Select **Schema** for the Content Type you want to modify.

   The [Content Type] Schema Properties page displays.
3. Use **Add Attribute** or **Add Nodes** to create additional schema attributes and nodes

   Use **Up** and **Down** to rearrange the order of the attributes in the UI.

   Use **Delete** to remove an attribute from the schema.

   For information on using **Create Meta Schema** see *Specifying Content Metadata*.

Add Content Type Schema Nodes

Use the following procedure to add content type schema nodes.

1. At the **Schema Properties** page, select **Add Node**.

The **Node Properties** page displays.

2. Complete the following property fields and select **Save Node Properties**.

   If you want the node to reside in a higher or lower position in the data structure, select **Up** or **Down**.

   The following table lists the schema node properties and describes the input for each property.

   Content Type Schema Node Properties

Property	Description/Input
Node Name	Enter the name for the node.
Reference Key	Reference Keys are arbitrary text strings used as internal identifiers for the content. They are locale independent; the reference key name does not change for an object supported in multiple locales. Select the field and accept the default value supplied by Knowledge Advanced. You can also specify a string to use as an internal identifier.
Description	Enter a description for the node. This description appears as a label on the Content Type Properties page.
Allow multiple copies of this node	Select this checkbox to allow this node to be added multiple times within a single record. For example, you could define a node that allows multiple contributors to a single news article.

Add Content Type Schema Attributes

Use the following procedure to add content type schema attributes.

1. Select **Add Attribute** on the Schema Properties page.

   The [Content Type] Attribute Properties page displays.

2. Complete the property fields and select **Save Attributes Properties**.

   The following table lists the schema attribute properties and describes the input for each property.

   Content Type Schema Attribute Properties

Property	Description
Attribute Name	Enter the name for the attribute.

Property	Description
Reference Key	Reference Keys are arbitrary text strings used as internal identifiers for the content. They are locale independent; the reference key name does not change for an object supported in multiple locales. Select the field and accept the default value supplied by Knowledge Advanced. You can also specify a string to use as an internal identifier.
Description	Enter a description for the attribute. This description appears as a label on the Content Type Properties page.
Select Attribute Type	Select the type of field for this attribute. See *Content Type Attributes* for a description of each type.
Select Attribute Options	Select one or more of the available options. When you select certain options, additional options may be revealed for that specific option.

Content Type Attributes

You can specify the following attribute types for custom repository, custom user, and content type article properties. Knowledge Advanced uses the attribute name and description to label the resulting attribute field.

The following table describes the content type attributes.

Content Type Attributes

Attribute	Description
Check Box	Select this to add a check box. For example, you could create a Subject Matter Expert node with check box attributes for each subject matter area that you define, and select those that are relevant when you define a new user.
Counter	Select this to increment a value for each instance of the attribute that you define, based on a specified prefix and start number. This is most commonly used for user and content type schema. For example, you could define a user attribute to assign an incremental value to each defined user based on the prefix `IQ` and the starting number `1000`. As users are defined, the application will automatically increment and assign the values, for example, `IQ1001`, followed by `IQ1002`.
Date	Select this to add a date field and calendar selector.

Attribute	Description
File	Select this to add a file input field and a file browser that you can use to locate files. When you select the File option, Knowledge Advanced displays the Secure Resource field. See *Secure Attached Documents*.
Float	Select this to add an input field to accept floating point values of a specified number of places.
Integer	Select this to add an input field to accept integer values of a specified number of places.
List	Select this to add one of the following types of data lists: Check box Drop-down Multiselect browser Radio button This attribute can be a master identifier. You must specify an existing data list. See *Data Lists* for more information.
Rich Text Area	Select this to add a text input field of a specified height having either basic, medium, or full sets of text editing functionality.
Text Area	Select this to add a text input field of a specified height having a basic set of text editing functionality.
Text Field	Select this to add a text input field of a specified number of characters and a basic set of text editing functionality. This attribute can be a master identifier.
Time	Select this to add date and time fields labeled with the attribute name and optional description.

Schema Attribute Options

Schema attribute options specify information to include in the record title, how the Knowledge Advanced search facility searches content fields, and whether fields are required.

The following table describes the attribute options.

Schema Attribute Options

Attribute Option	Description
Include in master record identifier	Select this check box to specify whether the value of the attribute will be used as an element of the title of a record within Knowledge Advanced. Only attributes of type List and Text Field can be master identifiers. You must specify at least one master identifier for each Content Type definition. The master identifier is the attribute that Knowledge Advanced uses as the title of the record for internal reference.

Attribute Option	Description
Enable full text searching	Select this check box to specify whether the contents of the attribute will be searchable by full text. Full-text search matches your search query against the contents of any article attributes that are available for searching.
Enable attribute level searching	Select this check box to specify whether the contents of the attribute are searchable by attribute. Attribute-based search restricts matching to only the specified attribute.
Attribute requires workflow approval if workflow is enabled	Select this check box to specify whether editing the value of this attribute is subject to workflow permissions and version incrementing when a workflow is assigned to this Content Type.
Make attribute a required field	Select this check box to specify that the attribute is required for all articles in the Content Type.
Restrict attribute to selected user groups	Select this check box to specify to display this attribute only to members of selected user groups. See *Specify User Group Restrictions for a Content Type Schema Attribute* for more information.

Search Options for Content Type Attributes

You can specify that an attribute be available for:

- Full text searching
- Attribute-level searching

Knowledge Advanced includes an internal search facility that you can use to search for content in the current repository by using the Find option.

Attribute level searching provides enhanced full text searching within specific attributes, for example, finding all people where First Name = Mary.

> **Note:** Not all data is appropriate for full text searching. File names and hyperlinks are examples of attributes that are generally not good candidates.

Specify User Group Restrictions for a Content Type Schema Attribute

> **Note:** This feature applies only to end users, not authors.

You can specify additional user group restrictions for content type schema attributes. For example, you could specify that the **File** attribute, which allows users to upload a file, appears only to members of the Support user group. This allows support agents to upload solutions for customer issues while other users do not see an option to upload a file.

To specify user group restrictions for a content type schema attribute.

1. On the **Attribute Properties** page for the selected content type, select **Restrict attribute to selected user groups** for the attribute you want to restrict.
2. Specify any of the following restriction options.
    a. Select **User groups are required for attribute** to specify that a user group must be associated with the specified attribute in this content type.

b. Select **Allow editors to change default user groups** to specify that authorized editors can override the default user group.
c. Select **Restrict** to specifies that the attribute appears only to members of the user group selected here.
d. Select **Default** to specify that the selected user group is associated by default so, whenever this attribute is used it appears only to the default user group.

Specify Content Metadata

You can define content metadata fields within a content type definition to store information about the article that is independent of version or locale. These attributes will not change based on version of the article or the locale associated with the article. This is useful for large attachments that would normally take up lots of disk space if they needed to be copied for every version or locale of as article.

Knowledge Advanced maintains content metadata independently of workflow steps and revision numbering, so that editors can modify this information without affecting the article version or progress within the publishing cycle.

> **Note:** You can also make content category and user groups available as metadata so that editors can change this information independently of the content workflow.

Use the following procedure to define content metadata.

1. Select **Content Type** > **List**.
2. At the Repository Content Types page, select **Content Type** > **Schema**.
   The Schema Properties page appears.
3. Select **Content Type** > **Create Meta Schema**.
   The Management Console displays an empty metadata schema hierarchy:
4. Specify nodes and attributes as described in *Create Content Type Schema*.

Secure Attached Documents

You can secure access to documents that are attached to articles. You specify secured attributes within the file attribute schema as described in *Content Type Attributes*.

Securing these attributes ensures that requests for an attached document will only be satisfied when made by a user having the appropriate access levels and user groups. When a user requests access to a secured document, Knowledge Advanced performs a set of security checks to ensure that the request is from an authorized session.

Tokens

You can define replacement tokens for use in articles. A replacement token consists of a token (a short, easily managed string) and some corresponding replacement text. When you publish content that contains a defined token, Knowledge Advanced replaces the token with the specified content, such as a word or phrase of standardized terminology, or even a large block of reusable content.

Replacement tokens enable you to do the following.

- Re-use content, such as product names, in a standardized form.
- Create complex content, such as integrated text and images, once and store it for re-use in multiple articles.
- Manage standardize content from a single resource.

Replacement tokens are available for use in all content types defined within the repository.

Add Tokens

Use the following procedure to create a new replacement token.

1. At the Repository tab, select **Token > Add**.

   The Add Replacement Token page displays.
2. Complete the fields on the **Add Replacement Token** page.

   The following table describes the token properties.

   Token Properties

Property	Description
Replacement Token	Enter an alpha-numeric string having no spaces or special characters. Knowledge Advanced capitalizes the token, however, references to tokens will resolve, regardless of case.
Select type	Select Richtext or Text. The rich text editor provides authors or editors with the ability to format text as they enter it. Knowledge Advanced preserves the text formatting when the content is displayed to end users. The text editor provides authors or editors with test only; you will lose the HTML formatting.
Replacement Text	Specify the text and/or images that you want to be displayed when this token is used in articles.
Remove styles definitions	Select this option to remove the existing styles definitions within the Replacement Text field. This removes both added and imported styles definitions.

Use Tokens

You can use replacement tokens that you have defined within any article text fields. Replacement tokens defined in your repository are valid in all content types.

1. Edit an article by any of the usual methods.

   To view the available replacement tokens, select **View Replacement Tokens** in the upper right portion of the Edit content page.

   Knowledge Advanced displays the currently defined replacement tokens in a separate window:
2. Enter the token name in any field that accepts text. You specify a replacement token in this format:

   ```
   {TOKEN_NAME}
   ```

   where the defined variable name is enclosed within curved braces.
3. You can view the resolved variable in the content preview page. Knowledge Advanced displays the replacement content within dashed lines.

Manage Tokens

This section describes how to display, edit, and delete tokens.

Display All Tokens

Use the following procedure to search for a particular token on a page.

1. Select **Tokens** > **List**.

   The Replacement Token page appears.
2. Enter the token name in the text area and then select **Find**.
3. Select the **Search Conditions** drop-down menu to search by the token or replacement name starts or inclusions.
4. Enter text in the text area, and then select **Find**.

Modify a Token

Use the following procedure to modify a token.

1. Select **Tokens, List** and then select the token you want to modify.
2. At the Replacement Token page, click **Edit Token** .
3. Modify the text and click **Save**.
4. To translate the token, select **Translate**.
5. Click **Done**.

The modified token appears on the Replacement Token page.

Delete a Token

Use the following procedure to delete a view.

1. Select **Tokens** > **List**, and then select the view you want to delete.
2. Click **Delete Selected Token** .
3. Select **Yes** at the Confirm Deletion message.

Data Lists

Data lists provide a method to re-use common lists of items that you want to present as choices, such as lines of business or geographic locations. Data lists provide a mechanism to ensure consistent data for common user choices. You can use data lists within objects that contain properties defined as attributes, such as content types and data forms.

You can create the following data lists types.

- Static lists of items that change infrequently, such as lists of US states.
- Dynamic lists generated from content type attributes.

You can create dynamic data lists based on content type attributes. Dynamic data lists provide the means to link data from one content type to another content type.

For example, you may have a content type that contains employee demographic data, which includes postal zip code information for each employee. You can create a dynamic data list of the zip codes in which employees live by referencing the zip code attribute of the employee data content type. The dynamic lists automatically update with additional zip codes (attribute values) as more employee data is added to the content type.

Add Static Data Lists and Items

Knowledge Advanced stores the list information as strings; however, you can store any primitive type of data as the value attribute of a list item.

Add a Static Data List

Use the following procedure to add a static data list.

1. At the Repository tab, select **Data Lists > Add**.
2. At the **Data List Properties** page, complete the fields and select **Save Data List Properties**.
   The Static Data List Properties table follows this procedure and describes the data list properties fields.

Knowledge Advanced displays the new data list on the **Data List Management** page.

The following table describes the static data list properties fields.

Static Data List Properties

Property	Description
Data List name	Specify a name for the data list.

Property	Description
Reference Key	Reference Keys are arbitrary text strings used as internal identifiers for the content. They are locale independent; the reference key name does not change for an object supported in multiple locales. Select the field and accept the default value supplied by Knowledge Advanced. You can also specify a string to use as an internal identifier.
Data List Type	Select **Static** from the drop-down list. Knowledge Advanced displays the **Sort by** and **Data List Items** fields.
Sort by	Select **Alphabetical** to sort list items alphabetically, or Select **Sort** to sort item in the order they are that they are listed on the **Data List Management** page.
Data List Items	Select **Manage Data List Items** to add items to the list. See *Add Dynamic Content Type Data Lists* for more information.

Add Dynamic Content Type Data Lists

Use the following procedure to add dynamic content type data lists.

1. Select **Data Lists, Add**.
2. At the **Data List Properties** page, complete the fields.

   The Dynamic Type Data Lists Properties table follows this procedure and describes the fields.
3. Click **Save data list item**.

The following table describes the dynamic type data list properties.

Dynamic Type Data List Properties

Property	Description/Input
Data List name	Specify a name for the data list.
Reference Key	Reference Keys are arbitrary text strings used as internal identifiers for the content. They are locale independent; the reference key name does not change for an object supported in multiple locales. Select the field and accept the default value supplied by Knowledge Advanced. You can also specify a string to use as an internal identifier.
Data List Type	Select **Content Type** from the drop-down list. Knowledge Advanced displays the **Sort by** and **Data List Items** fields.
Content Type	Select the Content Type that contains the attribute you want to reference from the drop-down menu, for example FAQ, Manual or KCS.

Property	Description/Input
Display Source	Select the display value of the desired attribute from the list of attributes defined for the selected Content Type.
Sort Source	Select the attribute that you want to sort by from the list of attributes defined for the selected Content Type.
Default values source..Equal or Not Equal	Specify the attribute value to use as the default value for the list. For example, specify `//ADDRESS/ST=CA` to define CA as the pre-selected default value.

Add Data List Items

Use the following procedure to add data list items.

1. At the Data List Management page, select the list to which you want to add items and then select the Manage Data Lists link in the Actions column.

   The Data List Items Management page displays.
2. At the Data List Item Management page, complete the fields.

   The Data List Item Fields table follows this procedure and describes the Data List Item Management fields.
3. Select **Save data items**. The data list item displays on the Data List Item Management page.
4. Use the box in the **Select** column to select data list items to Delete, or move Up and Down to change the order of list items.

The following table describes the fields on the Data List Item Management page.

Data List Item Fields

Field	Description/Input
Display String	Enter the string to display to end users.
Value	Enter the value of this data string; which can be literal, or any primitive type or data. Attributes can be any alphanumeric string; however, spaces and punctuation are not allowed.
Is Default	Select this checkbox to specify whether this item is pre-selected by default.

3 Manage Products and Categories

Category and Product Visibility for Knowledge Advanced Authors

The list of service categories and list of products available to Knowledge Advanced content authors depends on two primary configuration items:

- First, the View(s) associated with the Console User are each associated to a list of categories and a list of products, and the lists determine what categories are limited from view for Console Users while using the Knowledge Advanced Authoring tool.
- Further, the content type associated with the content being viewed or created also can limit what displays for available categories and products to associate with a document.

Thus, the Knowledge Advanced content author can only assign categories and products to an article that are included in both the categories and products in the author's view(s) and the categories and products assigned to the content type.

Interface configurations, including the visibility configured per-interface on service categories and products within the Products/Categories/Dispositions editor in the agent console, does not affect this behavior for Knowledge Advanced. Similarly, view assignments per interface within Knowledge Advanced authoring also does not affect this behavior. To avoid this mismatch, assign the same categories and products to an interface view that you assigned to the interface initially and adjust any associated content types accordingly.

Categories

Categories enable you to organize application content by any characteristic or business requirement, such as billing or warranty information, so that you can manage and present related content consistently for your users. Categories differ from Content Types; Content Types organize your content by article type, such as FAQ or News.

You can use categories within Knowledge Advanced to assign categories within Content Type definitions. After you assign a category, article creators can associate articles with one or more categories that you have enabled for the Content Type.

Define Category Hierarchies

You can define multiple levels of categories and sub-categories to represent any content structure within your organization. These multiple category levels form a hierarchy where the higher-level categories include lower level categories, and the lower-level categories inherit properties from their parents.

The highest level categories are called branch categories. Each branch can have a complete tree defined underneath it. The trees are hierarchical; if you search for articles within a specified products, the search automatically extends to the children of the category.

For example, a branch category named *Technology* might include the sub-categories *Hardware* and *Software*. Any content in the Hardware or Software category also belongs to the parent category, Technology; therefore a request for Technology content returns any content assigned to Hardware and Software as well.

Add Categories

You can add categories by accessing the Configuration button on the Navigation panel. To see the step-by-step procedure, select the Adding and editing products, categories, and dispositions help topic.

Manage Categories

You can view and modify categories.

View All Categories

To view all categories, select **Categories** > **List**.

The Repository Category Branch Management page opens. You can view all the categories or select a link to a specific category to view the details.

Modify a Category

You can modify categories by accessing the Configuration button on the Navigation panel. To see the step-by-step procedure, select the Adding and editing products, categories, and dispositions help topic.

Define Products

You can define products in your knowledge base using the process described in Using Service Cloud. See *Documentation for Oracle B2C Service (Answer ID 5168)* to locate the documentation for your specific release, then use the Documentation Library or the Online Help User Guide link to locate the relevant topics. Knowledge Advanced uses Products and Categories hierarchies that you define for your Oracle B2C Service environment, and automatically synchronizes any changes you make to the Product hierarchy.

Use the following procedure to display all products and sub products.

1. Select **Products, List.**

   The **Repository Category Branch Management** page opens.
2. Select the product link to view the reference key, external ID and a description of the product.
3. To view a sub product, click **View Sub Product** for product.

The Repository Product Management page displays. You can select a link for each product to view the description.

Create and Manage Views

You can create and manage views to segregate your knowledge base to reflect various aspects of your organization, such as brands, departments, or business units.

Views control the types of articles that users can view, create, and modify. You can define groups of users so that they have access only to specific views. Views also control the articles that can be assigned to a console user in a workflow and which user groups the console user can select when creating an article.

> **Note:** Repository views control console users' access to articles in the Knowledge Advanced console; they do not affect a console user's view of articles in the Agent Desktop.

Add a View

Use the following procedure to add a view.

1. Navigate to the Repository tab, Views, and select **Add**.

   The **Repository View Properties** screen displays.
2. Specify the repository view information in the appropriate fields.

   > **Note:** If you are creating a repository as part of the initial Knowledge Advanced configuration, you can complete only the required fields, and then specify additional properties as needed.

3. Select the **Save View Properties** link after you complete the fields. The new View appears in the Repository Views list. To display this list, select Views > List.

The following table lists and describes the fields you complete to add a repository view.

Add Repository Views

Field	Description
Repository View Name	Enter a unique name for the view.
Reference Key	Reference Keys are arbitrary text strings used as internal identifiers for the various objects in the system. They are locale independent; a single key identifies an object in multiple locales. Accept the default value supplied by Knowledge Advanced. You can also specify a string to use as an internal identifier. **Note:** Knowledge Advance assigns unique reference keys by default. If you override the default reference key for an object, the reference key you enter must be unique.
Select Categories	Select the categories to associate with this view. You can use the Select Mode drop-down menu to locate categories by browsing in Navigation mode, or by searching.

Field	Description
	At Available Categories, select one or more content categories or sub-categories to add to your Selected Categories. Categories that contain sub-categories display as links preceded by a plus sign (+).
Select Products	Select which products you want to associate with this view. At the Select Mode drop-down menu: Select Navigate to display product and product hierarchies for navigation Select Search to display products for search. When you select Search, you must also enter the search string.
	At Available Products, select one or more content categories or sub-categories to add to your Selected Products. Products that contain sub-products display as links preceded by a plus sign (+).

Manage Views

You can view, modify, or delete existing views.

Display All Views

Use the following procedure to display all views.

Select **Views** > **List**.

The Repository Views page appears.

Modify a View

Use the following procedure to modify a view.

1. Select **Views** > **List**, and then select the view you want to modify.
2. Modify the properties as needed.
3. Click Save View Properties .

Delete a View

Use the following procedure to delete a view.

1. Select **Views** > **List** and then select the view you want to delete.
2. Click **Delete Selected Views** .
3. Select **Yes** at the Confirm Deletion message.

   The Repository Views list displays and the selected view is deleted.

Interfaces

An interface is the console, windows, and pages used by your organization and users to access an Oracle Service Cloud application and interact with a single knowledge base.

Interfaces can include locales (language and region, such as English_United States), brands, departments and other business units.

Manage Repository Interfaces

You can view all interfaces and reset the interface view and locale.

Display All Interfaces

To display all interfaces, select **Interfaces** > **List**.

The Repository Interfaces Management page appears. You can view all the interfaces or select a link to a specific interface to view the interface details.

Modify an Interface

To modify an interface, select **Interfaces** > **List**, and then select the interface you want to modify.

- To modify the interface locale, click **Reset Locale**, select another locale, and then select Save.
- To modify the interface view, click **Reset View**, select another view, and then select Save.

4 Configure Content Collections

Content Collections Overview

Content collections are logical groupings of the documents that make information from your web sites and other repositories available within your knowledge base. A collection might have documents about a particular product or category, or it might have documents for a particular user group.

You create external collections by selecting and grouping documents that have similar characteristics and content processing requirements into a single collection. Create as many collections as you need to accommodate your organization's content and knowledge base requirements.

Create External Collections

You create external collections by specifying the following information:

- The web servers that host the collection's documents.
- The documents that make up the collection.
- How the content acquisition process interacts with the web servers and documents.
- The size and status of the collection.

You create and edit external collections by using one of the following methods:

- The Collections Wizard, which guides you through a step-by-step process.
- The Collections Form, which provides a streamlined process for more experienced users.

Use the Collections Form

Experienced administrators can use the Collections form to define, validate, and enable document collections. You can also use the form to edit a collection by changing required or optional information in any field within the form.

You define external collections by specifying all of the required information about the web servers that host the collection and the documents that make up the collection, as well as any relevant optional information.

The form is divided into sections that prompt you to perform the following collection tasks.

- Define the collection. You define basic collection information such as the name, locale, display locales, and so on.
- Access the collection. You define who can access this collection.
- Describe the collection. You specify how Search will crawl the web servers that host the documents for this collection.
- Validate the collection. You provide optional validation rules, as needed, to the collection.

- Review the collection options and activate the collection.

Use the Collections Wizard

The collections wizard guides you through a five-step process to define, validate, and enable external collections. You create an external collection by specifying all of the required collection information, as well as any relevant optional information.

You edit a collection by changing required or optional information in any of the wizard's screens. The wizard presents a sequence of screens that prompt you to complete the following collection tasks.

- Define the collection.
- Access the collection.
- Describe the collection.
- Validate the collection.
- Review the collection options and activate the collection.

Manage External Collections

You can maintain external collections by performing the following tasks.

- View the collection status to determine whether the content processor is processing and indexing the collection properly.
- Edit collection definitions to correct errors or change configuration.
- Enable or disabling collections for processing, indexing, and availability to end users.
- Delete collections from the knowledge base.

Define External Collections

You can define a new external collection or update an existing collection definition by using either the collection wizard or the collection form. You specify a name and basic information, such as the locale in which the collection documents are written, and whether you want to automatically add product names and terminology to the spelling checker.

Defining External Collections Fields

Field	Description
Collection Name	Enter a name for the collection. You can use spaces and any of following characters in collection names: • upper and lowercase alphabetic characters

Field	Description
	• numerals (0-9) • ( ) • - • _ • { } • " • .
Display Label	Enter a name for the collection that displays to search users. You can edit this later if you need to change the name. The display label can be in any language with any character and can be edited.
Locale	Select **Auto** to use automatic language selection based on document properties, or select a specific locale (language and regional variant) for the collection. This does not change the locale for any documents where the locale has already been set to something other than Auto in Authoring and does not change URL Answers.
Add product names and internal terms in this collection to the spelling checker?	Select **Yes** to automatically add product names and internal terminology to the spell checker. We recommend using this option for content that is edited for spelling before publishing, such as product documentation, but not for user-generated content, such as online forums.
Collection Notes	Enter any general descriptive information about this collection in this optional field.
Use Robots?	Robot text files and robots <META> tags specify which documents and links on a site are available for web crawlers to index and follow. Click **Yes** to use robots.txt and the robots <META> tag. The default is **No**.

Languages and Locales for External Collections

You must select a locale or a language when you create an external collection to determine which users can view the content in the collection. A locale designates a language as it is used in a specific region or by a specific population. For example, there are differences in how English is used in the United States compared with its use in Canada. Locales have codes that identify their language and region. The code for English Canada is en_CA, and the code for English United States is en_US.

At the **Locale** field, select Auto (automatic language detection for a collection, based on the language of the documents it contains), a locale, or a language as follows:

- If the collection includes documents authored in multiple languages, then select **Auto**, which uses document properties to assign a language to each document in the collection.
- If the collection includes documents authored in a single language, but not a specific regional variant, then select the language.
- If the collection includes documents authored in a specific regional variant of a language, then select the locale.

For information on assigning languages and locales, see *Assign Languages and Locales to External Collections*.

Assign Languages and Locales to External Collections

In applications that support multiple locales, each supported locale has a corresponding interface. You assign a locale or language to a collection to determine the available interfaces, as follows:

- Collections that have a specified locale are available only in the interface that corresponds to that locale
- Collections that have a specified language are available in all interfaces that correspond to the base language.
- Documents in collections that use automatic language detection are available in all interfaces that correspond to their assigned language.

For example, an application may support the following locales:

- English United States
- English Canada
- French Canada
- French France

You can assign collections to locales to make them available to only one interface. For example:

- The EnglishCanadadocs collection is assigned to the English Canada locale, and is available only in the English Canada interface.
- The FrenchFrancedocs collection is assigned to the French France locale, and is available only in the French France interface.

You can assign collections to languages to make them available to all interfaces based on that language. For example:

- The Englishdocs collection is assigned to the English language, and is available in the English United States and English Canada interfaces.
- The Frenchdocs collection is assigned to the French language, and is available in the French Canada and French France interfaces.

You can assign collections to **Auto** to make documents in the collection available to any interfaces based on the detected language. For example, the Mixedlanguagedocs collection contains both English and French documents. English documents in the collection will be available in the English United States, English Canada interfaces, and French documents will be available in the French Canada, French France interfaces.

How Document Titles Appear in Search Results

A document title appears in the search results as the full title when the title is short, or as a section or excerpt of the longer title. When a document has an obvious title (this is simply the string of words on the first page of a document that you would recognize as its title), Search selects that title automatically for the list of search results. If a document does not have an obvious full title, Search uses methodologies to determine the title based on:

- The position of the text on a front page, for example, the first few sentences of the document.
- The size of the font. Usually the larger text on a first page denotes a title.
- The entry in the **Title** field in the **Document Properties**.

In some cases the document titles may not reflect the content properly or completely. A good document title identifies the topic and begins to inform the reader about the content. A poor title can obscure vital information

so your customers may not select it although it contains the desired content. For example, the title *Oracle B2C Service Administrator Guide* describes the product and audience, but the title *Admin Guide* does not provide enough information.

The best way to ensure a good document title is to encourage authors to add strong titles to their documents.

How Search Discovers a Title of a PDF

In many cases, some or all of the articles in your collections are PDFs. Most PDFs have a visual title, which is a string of text on the first page that most readers would recognize as the title, for example *Mobile Phone User Manual* or *How to Read a Stock Report*.

However, not every visual title is that easy to spot. There may be many lines of text on the first page, or maybe no text at all. So how does Search determine the visual title to match to a search request?

Search uses the automatic PDF title discovery feature to determine PDF titles. It finds the visual title of a PDF automatically and uses it for title matching and as the search result title. A key advantage to the title discovery feature is you don't have to perform any additional authoring to provide the best search result title.

The title discovery evaluates the PDF for visual factors, such as:

- The size of the font. Usually the larger text on a first page denotes a title.
- The position of the text, for example, the first few sentences of the PDF.
- The phrase length and distance between lines of the text.

For example, this string of text appears on the first page of a PDF:

ORACLE [Font Size 28, Bold]

User Guide [Font Size 18, Bold]

Version 1.1 [Font Size 18]

This user guide describes the use of knowledge applications. [Font Size 14]

Most users wouldn't read this string of text as:

- Oracle, or
- Version 1.1, or
- This user guide describes the use of knowledge applications.

But they would read this text as:

- Oracle User Guide or User Guide
- Oracle User Guide Knowledge Management or User Guide Knowledge Management
- Oracle User Guide Knowledge Management Version 1.1 or User Guide Knowledge Management Version 1.1

So in this example, the PDF title discovery finds that the best visual titles for search accuracy are **User Guide Knowledge Management Version 1.**1 or **Oracle User Guide Knowledge Management OSvC 18**. This automatic title feature eliminates any additional authoring on your part to find and provide the best search result titles.

You can edit or change existing PDF titles with more meaningful titles. For more information on editing a title, see *Edit a Generated Document Title*

Note: The visual title of a PDFs displays as a search results title after the full content processing cycle is completed.

What if there's no title?

The automatic PDF title discovery feature may encounter PDFs that have no title at all. If it can't find a visual title to assign to a PDF, it selects one of the following as a search result title:

- The title in the PDF's properties, if a properties title is defined.
- The PDF's file name.

Edit Generated Document Titles

There may be instances when you need to edit or override the generated title of a document in your Web collection to create a more relevant title, for example:

- The title is missing a subtitle that can provide important details for user, such as a category, model number, or release date. For example, *Product ABC User Guide*, *Release 1.2*, is a more useful title than *Product User Guide*.
- The title is too ubiquitous or commonplace to be useful, for example *User Manual* or *White Paper*.
- The author of the document provided a different title from the generated title.
- There are multiple documents or attachments with the same name.

> **Note:** Only authors and other roles that have the proper entitlements to create and edit documents and collections can override document titles.

1. Navigate to the **Collection Setup** page and then click on the collection in which the document resides.

   > **Note:** You cannot edit the name of the collection itself. You can only edit or override titles of the documents and attachments within the collection.

2. Select the document or attachment for which you want to change an existing title.
3. Type the new title over the existing title.
4. Click **Save**.
   The new title appears after the application runs nightly (or weekly) batch processing on the collection.

Configure Access to External Collections

You configure content visibility for user groups and content processing authentication for external collections using either the **Collection Wizard** or **Manage Collections, Collection Form**.

You must specify whether the content in this collection will be visible to all users, or to specified groups of users. You must also specify whether the content acquisition process needs authorization to access one or more of the web sites that hosts the documents in the collection.

Restrict Collection Visibility to Specified User Groups

If you want all users to view content in this collection, select **Yes** option in the **Can everyone see this collection?** field. The default is Yes.

If you want only members of selected user groups to view content in this collection, select **No**, and then select the desired user groups from the **Available User Groups** column. The **Selected User Groups** column displays the user groups that you can select to view the contents of this collection. If you do not select a user group, the content is public and unrestricted.

Specify Authentication for Content Acquisition

If the content acquisition process does not require any authorization, select **No** in the **Do you need authentication to access these documents?** field. **No** is the default.

If content acquisition does need to be authenticated, select **Yes**, then specify the authentication method. You may also need to specify additional authentication information, such as form data, proxy server information, and cookie values.

Specify the Authentication Method

If you select **Yes** in the **Do you need authentication to access these documents?** field, you must select one of the following methods for authenticating the content acquisition process.

- BASIC specifies to use plain text user name and password information. You can also specify an optional Kerberos realm, which may be required for environments that are configured to trust non-Windows Kerberos realms.
- NTLM specifies to use Windows NT LAN Management protocol for access to servers using Integrated Windows Authentication for HTTP authentication. You must specify the domain in which the user name and password are valid, and you can also specify an optional Kerberos realm, which may be required for environments that are configured to trust non-Windows Kerberos realms.
- NONE enables you to specify only required additional authentication information, such as form data, proxy server information, and cookie values, if no user name and password are required.

Content Acquisition Authentication Fields

Field	Description
Authentication Method	Select the appropriate authentication method: • BASIC • NTLM • NONE
Username	Specify a valid username to access the web site(s).
Password	Specify the password for the username.
Realm	Specify an optional Kerberos realm, which may be required for environments that are configured to trust non-Windows Kerberos realms.

Field	Description
Domain	In NTLM environments only, specify the domain that the user and password are valid within.

Specify Additional Authentication Data

When you define an external collection, you may need to specify additional authentication information, including the following details.

- Form data, so that the content acquisition process can properly complete any html-based forms to supply information that the websites requires in order to access content.
- Proxy server information, so that content acquisition can use an HTTP proxy server to access the content.
- Cookie values, so that content acquisition can supply required cookies to maintain a session or state while accessing content.

Specify Form Data

You specify form data as a set of three types of information.

- A form action.
- One or more field names associated with the action.
- A value for each specified field name.

You can specify multiple sets of form data; for each form action, you can specify multiple field name and value pairs.

Specifying Form Data Fields

Field	Description
Form Action	Enter the URL at which the content acquisition process enters the associated field name-value pairs.
Field Name	Enter the field name in plain text.
Field Value	Enter the value for the specified field name in plain text.

Specify Proxy Server Information

You specify proxy server information as a set of header data and one or more key-value pairs that the content acquisition process adds to the header information to access the proxy server.

Proxy Server Fields

Field	Description
HTTP Header Data	The header information.
Header Key	The header key.

Field	Description
Header Value	The header value.

Specify Cookie Data

You can specify cookie data to maintain a desired state or session so that it can access content on the site. You enter cookie data as a set of one or more name-value pairs in plain text.

Note: If your collection uses more than one starting point, content acquisition passes the specified cookie data for the collection to all of the starting points.

Cookie Data Fields

Field	Description
Cookie	Enter the cookie name.
Cookie Value	Enter the cookie value.

Specify Content Acquisition for an External Collection

You describe the collection's contents by specifying how the content acquisition process behaves when it collects content from the host web sites. You specify the web sites by entering one or more starting point URLs. The content acquisition process begins at these specified points, and collects documents according to the content acquisition parameters that you specify, including the following data.

- The number of successive links from the start point that the crawler content acquisition processes.
- The types of documents to include and exclude.
- The URLs of any sitemaps and individual documents that you want to explicitly include in the collection.
- The URLs that the application can use to display collection documents to end users, if they are different than those that the content acquisition process uses to access the documents.

Web Site Specifications for Content Acquisition Process Fields

Field	Description
How many URL levels do you want to include?	Specify the number of URL levels (crawl depth) to include in the collection. The default is 10 levels. For example, a value of 4 specifies that the content acquisition process only includes four links (->) from the starting point page: Starting point page -> level 2 page (linked from starting point) -> level 3 page (linked from level 2) -> level 4 page (linked from level 3)

Field	Description
Do you have a sitemap.xml or web document url?	If you have sitemaps or web document URLs, select *Yes*. Add them to the Sitemap URL or Web Document URL field. If you do not have sitemaps or Web Document URLs, select *No*. Specify where to begin acquiring data and how deep to crawl in the **Starting point URLs** fields.
Starting point URLs	Specify one or more top-level URLs for the collection. The content acquisition process starts at each URL, and collects documents and follows links as specified in its configuration.
File name patterns to include or exclude	Specify one or more optional accept or reject document patterns. Document patterns are regular expressions that logically define desired document characteristics. Enter each pattern in a separate field. Content acquisition accepts all documents by default; in most cases you do not need to specify explicit document acceptance patterns.
Web Document URL	Specify any specific documents that otherwise are not accessed by the collection configuration.
Custom Display URL	Specify whether the user interface displays documents using a different URL than the collection configuration.

Use XML Sitemaps for Content Acquisition

We highly recommend that you use XML sitemaps to define the contents of external collections. Sitemaps are structured indexes created specifically for use by search engines. They list the URLs of the documents in your site and include important metadata about each document, such as when it was last updated, and how frequently it changes. Using XML sitemaps is the most efficient way to specify the documents that content processing will include in a web collection.

You can use existing XML sitemaps, or create new sitemaps using any of the many available tools. You can also manually create sitemap files. The following example shows a simple XML sitemap.

```
<?xml version="1.0" encoding="UTF-8"?>

 <urlset>xmlns="http://www.exampleofsitemap.com/schemas/oursitemap/0.5

 <url>
 <loc>http://www.location.com/</loc>
 <lastmod>2018-01-01</lastmod>
 <changefreq>monthly</changefreq>
 <priority>0.6</priority>

 </url>

</urlset>
```

Complete an External Collection

You complete an external collection by specifying its enablement status and setting its size limit. You can set the enablement status to save, test and review, and ultimately add a collection to your application. You specify size limits to optimize the content processing process and index size for a collection based on the documents it contains and your organization's requirements.

Enable a Collection

Select one of the following options to make the collection available to your users.

- **Keep the collection definition, but do not index for searching**. The content in the collection is not available to users. Use this option to disable a collection.
- **Place the collection in review, so that it is included in the search index, but is not available to users.** Use this option to test the collection before making the content available to users.
- **Enable this collection to go live, so that its contents are added to the search index, and are available to end users.**

Note: If you re-enable a previously disabled collection, content processing and indexing begins with the next scheduled content processing for the type of collection.

Specify the Size Limit for a Collection

You specify a size limit for a collection by selecting a pre-defined size limit type or defining a custom limit. You specify size limits to optimize the content processing process and index size for a collection based on the documents it contains and your organizations requirements.

Size Limits for a Collection

Size Limit	Collection Contents
Regular	Small and medium-sized documents, most of which require complete indexing. Content processing: • Indexes only the first 100KB of each document • Does not index documents larger than 5MB. This is the default collection size limit.
Archive	Small and medium-sized documents that can be returned as answers based on content that occurs near the beginning of the document, and therefore do not require complete indexing. Content processing: • Indexes only the first 2KB of each document • Does not index documents larger than 2MB For Archive collections, content processing indexes only the important sections of documents, thereby enabling faster content processing and reduced memory use.

Size Limit	Collection Contents
Manuals	Small, medium and large documents that require indexing of virtually all pages. Content processing: • Indexes only the first 500KB of each document • Does not index documents larger than 5MB For Manuals collections, content processing indexes entire documents (up to 500KB), thereby enabling more complete and detailed search results based on the entire document contents. This setting requires greater content processing resources, resulting in increased content processing time and greater memory use.
Custom	Documents of any size for which the pre-defined size types do not meet collection requirements. You can specify limits on: • The amount of each document's content that is indexed, using the Trim Index After field. • The maximum size of documents to be indexed, using the Skip Documents Larger Than field. **Note:** You can leave these fields empty to specify no limit. You can specify values in KB, MB, and GB.

Edit an External Collection

You can edit any configuration settings within existing collections by using either the collection wizard or the collection form. You select the name in the existing collections list on the **Manage Collections** page. When you select a collection and a method for editing, you can change the following data.

- The collection's name, display label, and basic information.
- Whether the content acquisition process needs authorization, the authentication method, and additional authentication information.
- The collection description.
- The validation rules.
- Whether the collection is active.

Delete or Disable a Collection

When you delete an external collection, the following operations occur:

- Knowledge Analytics removes the configuration information and all indexing data.
- Content processing stops collecting and indexing the documents in the collection.
- The collection's contents are not available as answers after the next content processing cycle completes.

Note: You cannot delete internal collections from the **Manage Collections** page. Instead, you delete the corresponding authoring content type.

1. In the **Existing Collections**, select the collection you want to delete.

2. In the **Edit <collection_name>** dialog, select **Collection Form**.
3. Scroll down to **Complete the Collection**.
4. For **Enable this Collection**, select **Delete this Collection**.
5. Select **Save**.
6. Confirm the delete action.

   Analytics deletes all of the collection configuration information, and removes the collection from the list on the Manage Collections page.

You can disable an external collection rather than deleting one. When you disable an external collection:

- Knowledge Analytics preserves the configuration information but removes all indexing data.
- The collection still appears in **Existing Collections** with the status of Disabled.
- Content processing stops collecting and indexing the documents in the collection.
- The collection contents are not available as answers after the next content processing cycle completes.

1. In the **Existing Collections**, select the collection you want to disable.
2. In the **Edit <collection_name>** dialog, select **Collection Form**.
3. Scroll down to **Complete the Collection**.
4. For **Enable this Collection**, select **Keep the collection definition, but do not index for searching**.
5. Select **Save**.

View Collection Information

You can look at the detailed information about internal and external collections, including the following details.

- How the application processed the collection content.
- The current validation rules.
- Documents included in the collection.

You view collection details by selecting **View Detail** in the **Actions Column** of the **Existing Collections** list on the **Manage Collections** page. You can also use the **View Detail** page to create or edit collection validation rules and document titles and locales.

> **Note:** This information pertains to the documents that were crawled but not indexed. For example you may see the number *5* in the**Number of Documents** field, but only 2 documents appear in the**Documents in this Collection** table. This means that the missing 3 documents were indexed and therefore do not appear in the table.

Review Collection Processing Information

You review collection details by selecting **View Detail** in the Actions Column on the Manage Collections page. This information helps you to determine whether the application is processing the collection and creating the index as required.

Collection Processing Detail Columns

Field	Description
Status	The most recently completed content processing step.

Field	Description
Number of Documents	The number of documents that the content acquisition process collected in its most recent cycle.
Number of Published Documents	The number of documents that content processing indexed in the most recent content processing run. This count includes each translation. For example, if you have one document in 5 languages in a content type, the count is 5.
Raw Size	The size of the collection after content acquisition.
Index Size	The size of the search index for the collection.

How the Search Application Schedules Content Processing

The Search application automatically schedules both incremental and full processing jobs for knowledge base (internal) and external collections. Content processing jobs render the collection content visible and available to your users for searching.

Incremental jobs process only content in the collection that has changed, and full jobs process all content in a collection.

The Collection Setup page shows the current scheduling for the following content processing jobs:

- **KB Incremental content update.** This job processes changes to knowledge base content. The application schedules knowledge base incremental processing to run every 15 minutes. This job processes a maximum of 10,000 documents at a time, then reschedules itself to process the remaining documents in batches of 10,000.
- **KB Full content update.** This job processes all the knowledge base collection content. This job processes a maximum of 10,000 documents at a time, and the remaining documents are processed in batches of 10,000 by the KB Incremental content update job. You may want to run this job on-demand, in case there is a change in the schema. For example, when an attribute is deleted.
- **Web Sitemap Incremental content update.** This job processes changes or additional sitemaps that define collections content. The application schedules incremental sitemap processing overnight when sitemaps have been updated or changed.
- **Web Full content update.** This job processes external collections content. The application schedules full processing to run once per week.
- **Index.** This job indexes the updated documents. The application schedules these processing jobs automatically, every 15 minutes. The scheduled time and day appear on this button: *Index Processing is scheduled to be run at: {date} at {time}.* The indexing and maintenance jobs perform the index cleanup tasks.
- **Indexing and Maintenance.** The indexing and maintenance jobs perform the index cleanup tasks. The scheduled time and day appear on this button: *Index Processing and Maintenance is scheduled to be run at: {date} at {time}.* You may want to run this job on-demand, when you are trying to fix any unforeseen issue with search results or query processing, where regular Index job is not able to resolve it. It doesn't need to be queued if the index is running fine.

You can schedule content processing jobs as follows:

- **KB Full content update.** You can schedule this job to run immediately by clicking *KB Full content update is to be run on-demand*.
- **Web Full content update.** You can schedule this job to run immediately by clicking *Web Full content is to be run on-demand*.

Validate External Collections

You can specify validation rules to ensure that you have defined the collection correctly, and that the content acquisition process is collecting the desired content from the configured web sites. You can specify validation rules for a new collection, and add or update rules for an existing collection.

Select one or more of the available rules and supply a value that the content processor uses to validate the corresponding aspect of the collection. You can specify validation rules for:

- The minimum and maximum number of documents in the collection
- Key documents that must be present in the collection

Note: Specifying validation rules is optional; you can specify any, all, or none of the available validation rules.

Validation Rules Fields

Field	Description
The minimum number of documents in the collection	The minimum number of number of documents that the collection must contain. If content acquisition collects fewer documents than the number specified, Knowledge Advanced issues a warning.
The maximum number of documents in the collection	The maximum number of number of documents that the collection must contain. If content acquisition collects more documents than the number specified, Knowledge Advanced issues a warning.
Key documents that the collection must contain	The URLs of one or more documents that the collection must contain. If content acquisition fails to collect one or more of these documents, Knowledge Advanced issues a warning.

5 Tune Intelligent Search

Tune Questions with Manage Search Query

The Intelligent Search application responds to end-user requests by providing answers derived from your organization's knowledge base content. You can improve the search results for user questions by using Manage Search Query (MSQ) to tune questions so that Search returns the most useful answers.

When you tune a user question, you are adding or changing objects in the Search dictionary; for more information about the dictionary see *Objects and Relationships in the Dictionary*.

MSQ enables you to tune questions using the following processes.

- *Work with Tuning Requests* . You can add, delete, or edit tuning requests.
- *Tune Questions*. You can tune the questions by adding or editing concepts and synonyms.
- *Analyze Tuning Impact on Similar Questions*. You can view how tuning changes affect other questions that are similar to the tuned question.

Access MSQ

To access MSQ in the Oracle B2C Service Navigation tree, click **Service, Knowledge Base, Manage Search Query**. The Manage Search Query screen opens.

Choose the Working Locale

You can set the locale (language and region, for example, English United States) to allow users to see data within the tuning flow from other locales. To set or change the locale, navigate to Manage Search Questions window, Choose a Working Locale pane, and select a language and region from the **Locale** drop-down menu.

Work with Tuning Requests

When you find a user question that is not returning the number or quality of answers you might expect, you can submit it as a tuning request to **MSQ**. Tuning a question, phrase or even a single word can have significant impact on search results returned for user questions.

MSQ logs tuning requests that originate from the Tuning Request page within MSQ or from the Knowledge Advanced Analytics Advanced Search Summary component. For more information, see *Use the Advanced Search Summary Component to Tune Questions*.

Filter the Tuning Request List

You can filter the Manage Tuning Request list to display only active requests or only archived requests. At the **Status** drop-down menu on the Manage Search Questions screen, select one of the following options:

- **Archived Requests**. This option displays only the requests marked as **Reviewed**.
- **Active Requests**. This option displays only active requests, which are tuning requests that are awaiting some action.
- **All Requests**. This option displays all requests.

Edit a Tuning Note

You can edit your tuning notes.

1. Click the note you want to edit and click **Edit** icon.
2. Enter or edit notes in the text field and click **Save**.
3. If you are satisfied with your changed, click **Publish** to publish and save changes.

   If you want to review or analyze the changes, click **Next**.

Add a Tuning Request

You can enter a new tuning request or add a tuning request from the Manage Tuning Requests list.

1. At the **Manage Search Query** screen, type the question you want to tune in the **Enter a Question** field, and then click **Tune Question**. Or, you can select the **Add Tuning Request** button.
2. Enter the question that you want to tune.
3. Select the **Priority** of the tuning request.
4. Add optional Notes to help you manage the request.
5. Select **Add**.

To add a tuning request from the **Manage Tuning Request** list:

1. Click on the request you want to tune.
2. Click the **Open Tuning Request** icon next to the question.

The selected question appears in the **How Search Interprets the Question** pane.

Close Tuning Requests

When you complete a review of a tuning request as part of your request management process, you change the status to **Reviewed**. This action closed the request. The application moves all reviewed requests from the Active Requests list to the Archived Requests list and changes the request status to **Closed**.

The **Delete Closed Tasks** batch job automatically deletes closed tuning requests. This batch job runs once a week and deletes all requests with the status Closed for at least seven days.

1. Select the request to mark for review and select **Mark Reviewed**.

The request you marked is deleted from the **Active Requests** list and added to the **Archived Requests**.

2. Select **Archived Request** from the **Status** drop-down menu to see the reviewed request with a status of **Closed**.

> **Note:** Tuning requests remain in the Archived Request list for seven days and then are automatically deleted.

Delete a Tuning Request

You can delete a request from the Manage Tuning Requests list by selecting the request and then selecting **Delete**.

Intelligent Search Dictionary

When you tune a question you are adding or changing objects in the Intelligent Search dictionary. The dictionary is a Search component that contains:

- Language information, in the form of a hierarchy of semantic relationships that describes words and phrases in multiple locales.
- A rules engine that determines the best answers to users' questions.

Search uses the dictionary to analyze and index your knowledge base content, and to match users' questions to the best answer.

Objects and Relationships in the Dictionary

Intelligent Search uses concepts to match words in both users' questions and in the knowledge base content based on their meaning. It also recognizes that some concepts are more important to users than others, and uses that information to prioritize answers within search result. For example:

- For the concept *plan*, you might add the synonyms *agreement* or *proposal*.
- For the concept *picture*, you might add the synonyms *photo*, *photograph*, or *image*.

The dictionary stores these objects and relationships in base, industry, and customer-specific layers; when tuning MSQ to tune user questions, your changes affect only the customer-specific layer.

You work with the following types of objects and relationships in MSQ.

- Concepts
- Synonyms
- Products

Concepts and Synonyms

The dictionary uses concepts and synonyms to associate different words that have the same meaning with one another. A concept is simply a word and its synonyms, which the dictionary treats as a single object.

Intelligent Search uses concepts to match words in both users' questions and in the knowledge base content, based on their meaning. It also recognizes that some concepts are more important to users than others, and uses that information to prioritize answers within search results.

Concept Scores

A concept score is a value that reflects the importance of the concept to your organization. This score helps establish how relevant a document is to the search question during document retrieval and ranking.

A concept score can have a value of High, Medium, and Low, where High represents a concept that is very important to your organization and Low represents a concept that is not as important.

All dictionary concepts have an original score. How the concept gets its original score depends on the concept type.

- The **Out of the Box (OOTB) concepts** receive scores during the ontology development cycle.
- The **Custom concepts** that Search administrators or analysts create automatically receive the default score *High*.
- The **Product concepts** have scores generated during the content indexing process.

  Product concept scores can vary with a substantial increase or decrease of the documents that mention the product name.

There may be instances when you want to review or modify concept scores while tuning Search questions. You can select or update a value in the **Score** field on the **Edit Concept** popup menu. You select one of three options *High*, *Medium*, and *Low* in the dropdown menu.

After you modify the concept score, Search must complete a full content index processing cycle before your modifications takes effect.

Products

Knowledge Advanced automatically creates product concepts in the Search dictionary for all products in the Service Cloud hierarchy, and automatically updates the dictionary when you change or delete products. You cannot delete products from the dictionary using MSQ; you can delete them only by modifying the Service Cloud product hierarchy.

Tune Questions

You tune questions by performing the following tasks.

- *Select or Enter a Question to Tune*

  You select the question you want to tune.
- Analyze *How Intelligent Search Interprets a Question* .

  You can see how MSQ annotated the words in the selected question.
- *Tune an Annotation*

You select an action to tune annotated words from the Action To Take dropdown menu, for example, *Create a Concept*.

- *Review the Tuning Results*

  You see search results before and after you tune a question.

- *Analyze Tuning Impact on Similar Questions*

  You see the impact of your tuning on documents.

- Publish your changes.

How Intelligent Search Interprets a Question

When you submit a question for tuning, MSQ provides one or more annotations for each word in the question. It derives these annotations using a series of processes that break he question down to individual words to find and correct spelling errors, reduce plural words to singular, and check whether each word is a concept or a synonym of a concept in the Search dictionary.

After the processes are completed, MSQ displays the annotations on each word in the **How Search Interprets the Question** pane.

- Each annotation with an X represents a word that the tuning process skips (skip word).
- Each annotation with a light bulb icon represents one or more words that are synonyms of a concept in the Search dictionary.
- Each annotation with two pages represents an unknown word.

When you enter a sentence to tune with more than one word, the annotations have a darker background until you select one or more words. For one-word sentences (for example, the sentence *Accessories*), MSQ automatically selects that annotation and the background is lighter.

You can see and compare changes to similar questions at **Compare Changes to Similar Questions Your Users Are Asking**. Click the checkbox to display recent similar questions your users asked. If you don't want to see the list of recent questions, simply uncheck it. This checkbox is checked by default.

> **Note:** When you select this checkbox, the checkbox in **Search Results After Using the Tuned Question** is also selected. Conversely if you unselect the checkbox, the Search Results After Using the Tuned Question checkbox is also unselected. When you start a new tuning flow, MSQ uses the latest check box status from the previous tuning flow. Once you select the check box, the results remain displayed, even if you unselect it.

Actions To Take Menu

The **Actions To Take** menu lists the tuning options for each object. Each object has a set of tuning actions, as displayed in the following table.

Actions To Take Menu

Object	Actions To Take
Concept	**Edit Concept**. You can modify the: • Enabled selection

Object	Actions To Take
	• Locale • Description of the concept For information on editing concepts, see *Edit a Concept* .
	Add to Existing Concept. You can add synonyms to this concept. For information on adding synonyms to existing concepts, see *Add to Existing Concepts*.
	Delete Concept. You can delete this concept. For information on deleting concepts, see *Delete a Concept*.
Product	**Edit Product**. You can add a synonym to this product. For information on editing products, see *Edit a Product*.
Unknown word	**Fix Spelling**. You can change or correct the spelling, which may return a concept that already exists. For information on making spelling corrections, see *Correct Spelling*.
	Create New Concept. You can complete the form to add the unknown word as a concept For information on adding concepts see *Create a Concept*.
	Add to Existing Concept. You can add synonyms to this concept. For information on adding synonyms to existing concepts, see *Add to Existing Concepts*.

Select or Enter a Question to Tune

To begin the tuning process, you enter or select the question to tune.

Enter a new question in the **Enter Question** field and click **Tune Question**.

Or, you can select a question in the **Manage Tuning Request** pane and click the **Open Tuning Request** button in the Action column.

Tune Words

You can tune one or more annotated words in a question.

1. Select the word to tune in the **How Search Interprets the Question** pane.
2. In the **Actions to Take** drop-down list, select the action you want to use to tune this question.
    - See the *Actions To Take Menu* table to view the available tuning options and their descriptions.

3. Click the arrow button.

   You see the popup form for the action you selected; for example, if you select the action to create a new concept, the Create New Concept form opens. See the procedures for each action in this chapter.
4. If you are satisfied with your changes, click **Publish** to save and publish changes.

   If you want to review and analyze the changes, click **Next**.

Create a Concept

You can add a concept to a word that MSQ has annotated as an unknown word. MSQ will return results that match not only a particular concept but also its synonyms and related concepts.

1. At the Tune Question screen, select the word or the word for which you want to create a concept in the How Search Interprets the Question area.
2. Select **Create New Concept** in the **Action to Take** drop-down menu, and click the arrow.
3. Complete the following fields on the **Create New Concept** popup window.

Create New Concept Popup Window Fields

Field	Action
Concept Name	Enter the name for the new concept.
Enabled?	Select **Yes**. This is the default. If you select No, Knowledge Advanced ignores the concept.
Description	Enter the reason adding the concept and a description of the edit, if necessary.
Score	Select *High*, *Medium*, or *Low* in the dropdown menu. o High (concepts most important to your organization). o Medium (concepts important to your organization). o Low (concepts less important to your organziation).
Synonym	Add a synonyms for this concept. A synonym is a word having the same or nearly the same meaning as another word in the language. For example, for the concept plan, you might enter the synonym contract.
Locale	Select the locale (language and region) for the new concept.
Warning	This column shows warnings associated with the synonyms you add, for example if you add a synonym that is a duplicate within the list of synonyms.

Field	Action
	Add a synonym and select **Change**, and any warning for that synonym displays.

4. If you are satisfied with the changes, click **Publish** to save and publish the changes.

   If you want to review or analyze your changes, click **Next**.

Add to Existing Concepts

You can add synonyms to existing concepts.

> **Note:** It is best to enter all synonyms in lowercase and in their unmarked (stemmed) form. MSQ automatically matches the marked forms of that word, such as plural nouns or conjugated verbs. You may enter special characters, such as Chinese characters, into these synonyms field.

1. In the How Search Interprets the Question pane, click the word that represents the concept.
2. In the Action to Take drop-down list, select **Add to Existing Concept** and click the right arrow.

   The **Add to Existing Concept** popup window appears.

   Adding to Existing Concept Popup Window Fields

Field	Description/Input
Add This Synonym	Enter the synonym you want to add.
In This Locale	Select the language and region for the synonym.
Add to Which Concept?	Enter the existing concept and select the Search icon. A list of similar concepts displays in the Matches box. Select the concept and click **Add**.

3. Complete fields on the **Adding to Existing Concept** popup window.

   The Adding to Existing Concept Popup Window fields table follows this procedure and describes the fields.
4. Click **Add** to return to the Tune Question window.

   The Change Summary pane shows the edited concept.
5. If you are satisfied with your changes, click **Publish** to save and publish changes.

   If you want to review or analyze the change, click **Next**.

Edit a Concept

Perhaps you want to add to or change an existing concept. You can edit all your existing concepts.

1. Enter the word you want to add or edit in the **Enter a Question** field and then select **Tune Question**.
2. At the Tune Question screen, select the word or the word in the phrase you want to edit in the How Search Interprets the Question area.
3. Select **Edit Concept** in the Action to Take drop-down menu, and select the arrow.
4. Complete the fields on the Edit Concept popup window.

Edit Concept Popup Fields

Field	Description
Enabled?	Select **Yes**. This is the default. If you select No, Knowledge Advanced ignores the concept.
Score	Update the concept score by selecting another score in the dropdown menu. o High (concepts most important to your organization). o Medium (concepts important to your organization). o Low (concepts less important to your organziation). After you modify the concept score, the application must complete a content index job successfully before the modification takes effect.
Description	Modify the description of the edit.
Synonym	Add a synonym for this concept.
Locale	Select the language and region for the new concept.
Warning	This column shows warnings associated with the synonyms you add, for example if you add a synonym that is a duplicate within the list of synonyms. Add a synonym and select **Change**, and any warning for that synonym displays.

5. If you're satisfied with your changes, click **Publish** to save and publish changes.

   If you want to review and analyze the changes, click **Next**.

Delete a Concept

You can delete concepts that are no longer applicable or are duplicates.

1. At the Tune Question screen, select the concept to which you want to delete in the How Search Interprets the Question area.
2. Select **Deleting Concept** in the **Action to Take** drop-down menu and select the arrow.
3. At the Deleting Concept popup, view the concept and associated concepts to ensure you really want to delete the concept.
4. Select **Delete**, and at the confirmation popup, select **ok**.

   The concept is deleted.

Enable a Disabled Concept

Occasionally, maintenance on the Dictionary includes disabling outdated out-of-the-box (OOTB) dictionary concepts. Once the concepts are disabled, their associated synonyms are also unavailable.

If you need to use a disabled concept, you can use the following procedure to enable it again. Once you enable a concept, the synonyms associated with it are also available.

> **Note:** You can see a list of disabled concepts in the Release Readiness document.

1. Launch Agent Desktop and navigate to Home, Manage Search Query (MSQ).
2. In the **Tune a Question** field, type the word *test* and click **Tune Question**.

   The concept **test** is highlighted in the **How Search Interprets a Question** panel.
3. At the **Action to Take** menu, select Add to Existing Concept and click the arrow.
4. At the Add to Which Concept field, type the name of the concept you want to enable and click the magnifying glass to open the list of concepts.

   The disabled concept appears in the **Matches** field.
5. Click **Add**.
6. In the How Search Interprets a Question panel, click the concept annotation, and at the Action to Take menu box, select **Edit Concept**.

   The **Enabled?** field should have **Yes** selected; if not, select it.
7. In the Synonym list, select *test* and click **Change**.
8. Click **Next**, and then click **Publish**.

   The concept is enabled and will be available after a successful content processing run is completed.

Correct Spelling

The tuning process corrects common, misspelled words automatically. However, if you enter a word that the tuning process does not recognize, or it returns a word not synonymous with your meaning, you must correct the spelling manually.

1. In the How Search Interprets the Question pane, click the button of the misspelled word.

   The Fix Spelling window appears.
2. In the **Should Correct To** field, enter the correct word and click the **Change** button to return to the Tune Question window.

   The Change Summary pane shows the corrected word.
3. If you are satisfied with the changes, click **Publish** to save and publish changes.

   If you want to review and analyze the changes, click **Next** to continue tuning.

Edit a Product

Perhaps you want to add to or change a product concept. Use the following procedure to edit any or all of your product concepts.

1. At the Tune Question screen, select the word or the word in the phrase you want to edit in the How Search Interprets the Question area.
2. Select **Edit Product** in the **Action to Take** drop-down menu, and select the arrow.
3. Complete the following fields on the Edit Concept popup window.

   Edit Concept Popup Window Fields

Field	Description
Enabled?	Select **Yes**. This is the default. If you select **No**, MSQ ignores the concept.
Description	Modify the generated description.
Synonym	Add a synonym for this product.
Locale	Select the language and region for the new synonym.
Warning	This column shows warnings associated with the synonyms you add, for example if you add a synonym that is a duplicate within the list of synonyms. Add a synonym and select **Change**, and any warning for that synonym displays.

Field	Description

4. If you are satisfied with your changes, click **Publish** to save and publish the changes.

   If you want to review or analzye your changes, click **Next**.

Review the Tuning Results

You can review the tuning changes you made to determine whether they improved the search results by comparing the number and quality of the results returned before tuning and after tuning.

1. At the **Tune Question** window, click **Next** or click **Review Search Results** at the top of the screen.

   The Review Search Results window opens with the tuned question.
2. Click the checkbox next to **Search Results After Using the Tuned Question**.

   Selecting this check box displays recent search results after using the tuned question. The checkbox is unchecked by default, which improves the speed of the MSQ tuning flows.
3. To understand how results change after tuning, you need to review the search results *before* tuning. Click the **Search Results Before Changes** link to view and compare the search results before you tuned the question.
4. Review the search results *after* tuning the question in the **Search Results After Using the Tuned Question** pane.

   - The **Improved?** column shows an up arrow or down arrow next to a search result, which means the answer moved up the list of results (improved) after tuning, or moved down the list (demoted) after tuning. A dash means that the answer stayed in the same position after tuning.
   - The **Result** column shows the search results for the tuned question.
   - The **User Click-Through** column shows the number of times users viewed the search result in the Customer Portal. Users viewed answers with a higher click-through more often and viewed answers with a lower click-through less often. You can use this information to help assess how to position answers in the results list.

     Generally, when more answers with *higher* click-throughs are promoted, or moved up the result list, the tuning had a positive impact. When more answers with *lower* click-throughs are moved up the result list, this can indicate that the tuning had a negative impact.
5. You can review the tuning changes for this question in the **Change Summary** panel, and review any notes in the **Tuning Notes** panel.
6. If you are satisfied with the review, click **Publish** to save and publish the changes.

   If you want to analyze your changes, click **Next**.

Analyze Tuning Impact on Similar Questions

You can review how your tuning changes affect the health of your knowledge base by analyzing the impact on similar questions, or questions that share similar words or concepts to the tuned question. For example, for the tuned question *Can I add a user to my family plan?* you might see the following similar questions.

- Can I change my family booster?
- Can I add a line to my family plan?
- Can I add a family member to my current booster plan?

MSQ calculates whether the relevancy of the top answers returned to similar questions remains the same, improves, or diminishes after tuning the original question. It uses an algorithm comprised of several metrics to generate a score for each result before and after the tuning changes. Once these scores are calculated, the system compares these scores to each similar question before and after tuning.

1. Select **Analyze Change** (or select **Next**).

   At the Analyze Change screen you see a list of the similar questions in the Impact of Tuning Changes pane.
2. At the **How Changes Impact** drop-down menu, select one of the following options. (MSQ calculates certain characteristics (such as click-through rates, answer positions, etc.) that provides values for each option.)

   - **Clicked Document**. This is the number of times a user clicked through on an answer after asking a question. This is calculated by using metrics such as index positions and the number of answer click-throughs.
   - **Linked To Case**. This is the number of incidents (cases) linked to an answer in a time period.

     This is calculated by using metrics such as the answer relevancy score, index positions, and the number of incidents linked to the answer.
   - **Popular Document**. These are the articles users opened most often in a time period.

     The metric for this option is calculated by information such as the search relevancy score and the number of times the article was opened or clicked on.
3. See how the Search results are impacted by your tuning changes in the **Impact of Tuning Changes** pane. For each similar question in the list, you see:

   - **Improved**.

     This is a visual indication that represents whether the results set for this question improved. The icons are:

     - The dash indicates the tuning changes added no change to the clicked article.
     - The up arrow indicates the tuning changes may have added positive value and made the search better.
     - The down arrow indicates the tuning changes may have detracted from the value and made the search worse.
   - **Estimated Improvement**. This is a numeric value that represents the positive or negative change. This is calculated using different algorithms based on the option you selected in the How Changes Impact drop-down menu.

4. When you have reviewed the tuning impact on all similar questions:
    - If the tuning changes affected your knowledge base in a negative way (detracted from the value), select **Cancel** to return to the previous screens to modify or cancel your changes.
    - If the tuning changes affected your knowledge base in a positive way (improved the value), select **Publish** to save all changes.

6 Build Intents

Intents Overview

Intents are dictionary objects that help determine how Intelligent Search interprets and responds to user questions. Intents give you more control over the search results for the important questions that customers ask, helping you to guide them to the articles that best answer their questions. Creating intents and linking them to articles also helps your customers in important ways.

- Intents return the best answers to common user questions first.
- They return the specific articles that you want customers to access for the intent's purpose.
- They help you analyze users' behavior so that you can improve your knowledge base.

Model Questions

A model question is any question, phrase, or a single word that you want to group within an intent. You can think of model questions as different ways of asking a single question. All of the model questions in an intent should be answered by the articles that you link to it.

For example, to provide customers with a consistent and helpful user experience when they ask about paying their bill, you might want to create a bill inquiry intent. Model questions, phrases, and words in a bill inquiry intent might include the following:

- When is my bill due?
- How much do I owe?
- What is my balance?
- Bill payment
- Balance payment
- Bill
- Balance
- Payment

The idea is to include as many model questions, words, and phrases as you need to match the full range of customer questions about billing amounts and payment deadlines.

Linked Articles

You can link one or more articles to an intent to provide the answer or answers to the model questions. You can link multiple articles to one intent, and you can link an article to multiple intents.

For example, you might link several articles to a bill inquiry intent to provide answers to questions about how to view and pay a bill, and how to find out when a payment is due. Similarly, you might link several popular troubleshooting articles to a troubleshoot device intent to provide a range of solutions to common device questions.

Create an Intent

You can use the Intent Builder to create and update intents that link common user questions to the best answers in the knowledge base. You can create up to 500 intents. When you reach the maximum number of intents, the Create Intent button is disabled. If you need to add more intents, review the existing intents and remove any that are no longer needed.

1. Open your Agent Desktop and navigate to Configuration, Service, Knowledge Base, Intent Builder.
2. Select the locale in which you want to create the intent from the **Locale** menu.
3. Click **Create an Intent**.
4. Enter a name that describes the purpose in the **Intent Name** field.

   Click **Enable** so the intent takes effect in the application. This box is checked by default.
5. Add a decription of the intent in the **Description** field and click Next.

   The description helps search administrators understand the intent's purpose when updating
6. Add your model questions in the **Add a Model Question** field.

   For the procedure to enter model questions, see *Add Model Questions*.
7. Link the articles that match the model questions.

   For more information on linking article to an intent, see *Link Articles to an Intent*.
8. Review the intent and then click **Save and Publish**.

   A new intent does not affect live search results until the dictionary updates are synchronized with the knowledge base. Synchronization usually happens within an hour of updating the dictionary, but the time varies depending on the size of the repository.

Edit an Intent

You can edit an existing intent.

1. Select the intent to edit from the Intent list and click the Edit icon in the **Action** column.
2. At the **Edit** page, make your changes and click **Save** to move to the next page.

   If you decide not to edit the intent, click **Cancel** and the application takes you back to the Intents page.

Add Model Questions

You can add model questions to an intent.

1. At the Model Question page, enter a model question in the **Add a Model Question** field and click **Add**.

The model question appears, along with any previously entered model questions, in the **Model Questions** list.

2. You can view the user questions that are related to your intent. Select the model question and then click **Check Related Questions**.

   The **How Model Questions Related to Recent User Questions** window displays.
3. To find user questions that match the new intent exactly, type the question and click **Find an Exact Match**. If there are exact matches to the model question, they will display in the field.
4. To find user questions related to the new intent, click **Related Questions**.

   The list of questions related to the intent displays. These questions may contain a word, phrase or synonym in the selected model question. For example, for the "Service Request" intent, some related questions might be "log service request', or "access service request". All user questions, including the new question you entered, appear in the field.
5. Select the user questions to match to the intent by clicking **Include**. Click **Exclude** to delete user questions.

   The user questions you choose to match the intent appear in the **Selected Questions** field.
6. Click **Next.**

Link Articles to an Intent

You can link articles from your knowledge base to an intent.

1. At the Link Responses page, click **Link an Article**.
2. At the **Search the KnowledgeBase** page, type in terms to search the knowledge base for articles to associate with the intent.

   You can search by **Title Only**, **Document ID Only**, or **All**, which searches information in all fields of an article.
3. Select the article(s) you want to include.

   The **Edit Linked Document** page displays.

   Edit Linked Document Menus

Field	Description
Article Attribute	This menu shows attributes defined in the content type in the knowledge base for this article. For example, FAQs may have attributes like: question, answer.
View by Locale	This menu shows all of the translations available for this article.

   Use **Back to Search** to return to the search page.
4. Click **Save**.

   The selected article appears on the Linked Responses page , **Linked Articles** section.
5. Click **Next**.

7 Manage Users

Users and Roles

You can manage users through roles, which control the level of management access you have to Knowledge Advanced, the general authoring abilities you have on a particular Content Type, and what tasks you can perform in a workflow.

Users are assigned either Console roles or Web roles. Console roles are assigned to users who require access to authoring and administrative tasks; Web roles are assigned to external users on the customer portal. Console roles also list one or more user groups to determine what the console user can see in the Customer Portal in the same manner as web roles provide Customer Portal access to web users. This section covers the following topics.

- *Knowledge Advanced Sysadmin Role*
- *Add Console User Roles*
- *List and View User Profiles*
- *User Profiles*
- *User Groups*
- *User Reputation Levels*

Knowledge Advanced Sysadmin Role

The Knowledge Advanced `Sysadmin Role` console role is a system generated role which does not require any setup and cannot be modified. A user with the `Sysadmin Role` has the ability to access all knowledge base content and to add any permissions to other profiles. Specifically, a user with this role can perform the following operations exclusive to the role.

- Add Permissions to API roles.
- Add permissions to a console role that the user's own role does not have. Regular users can only see the roles to which they are assigned. A `Sysadmin Role` user has access to everything.
- Access the following administrative tools.
    - System Configuration settings
    - Batch Job Status information
    - Full Text Search reindexing and reports
    - Locale Management
    - Tasks & Notifications template editing

Note: The Sysadmin Role appears in the Knowledge Advanced agent console as Default Administration Role.

Assigning the Knowledge Advanced Sysadmin Role

To assign a user the **Sysadmin Role** console role:

1. Login as an administrator.
2. Navigate to the **Users** tab and click **List** under the Console Users section.
3. Find the user to be granted the console role and select the **Add Sysadmin Role** button associated with that user.

Synchronize User Accounts

Administrators can synchronize Service and Knowledge Advanced user accounts by running the shadow account batch job. You can run the job manually or queue it to run daily. The default setting is to run the job manually. When you run the job manually, it runs once within 15 minutes.

When the shadow account job runs, it does the following:

- Gets all user accounts created in Service since the last job completed and creates knowledge users.
- Inactivates knowledge users whose accounts are disabled or deleted in Service, and removes them from assigned tasks.

> **Note:** If a disabled user account has been reactivated in Service, the shadow account job does not reactivate the user account in Knowledge Advanced.

You can view the history of previous jobs by clicking **History**. The job history includes information about inactivated accounts.

Queue or Run the Shadow Accounts Job

1. Navigate to Knowledge Advanced, Authoring.
2. Click the **Tools** tab.
3. Click **Configure** under Shadow Account.
4. Click **Schedule** to run the job now.
5. (Optionally) Select **Yes** for **Queue shadow account job to run daily** to run the job on a daily basis.

Add Console User Roles

Use the following procedure to define a security role.

1. Select the **Users** tab.
   Knowledge Advanced displays the User and Security Management page.
2. At **Console Roles**, select **Add**.
   Knowledge Advanced displays the Security Roles Properties page.
   The Security Role Properties page is divided into the following sets of security properties.

- Profile name as described in *Specify Security Role Profile Name*.
- Search management privileges as described in *Select Search Optimization and Administration Activities*.
- Repository management privileges as described in *Select Repository Management Activities*.
- User and security privileges as described in *Select User and Security Management Activities*.
- Content management privileges as described in *Select Content Management Activities*.
- Repository workflow privileges as described in *Select Workflow Approval Steps*.
- Collaboration and e-marketing management privileges as described in *Select Collaboration and E-Marketing Activities*.

Specify Security Role Profile Name

You specify security role properties using the settings in the Role Information section of the Security Roles Properties page. Specify the Profile Name of the security role, for example Content Editor.

Select Search Optimization and Administration Activities

You specify search optimization and administration activities for the Knowledge Advanced server and application using the Search Optimization and Administration Activities settings on the Security Roles Properties page. You can select the top-level privilege or select specific sub-privileges.

Select the **Manage Search Administration Settings** option to grant all Analytics configuration privileges that allow users to modify, and delete collections and configure Customer Portal, Integration, and Search settings.

Select the **Manage Search Optimization** option to grant management privileges for Intents and Question Tuning.

Select Repository Management Activities

The Repository Management area of the Security Role Properties page provides parameters to perform the following activities.

- Manage content categories as described in *Specify Content Category Management Privileges*.
- Manage Content Types, as described in *Specify Content Type Management Privileges*.
- Manage data lists, as described in *Specify Data List Management Privileges*.
- Manage interfaces, as described in *Specify Interface Management Privileges*.
- Manage tasks, as described in *Specify Task Management Privileges*.
- Manage tokens, as described in *Specify Token Management Privileges*.
- Manage workflows, as described in *Specify Workflow Management Privileges*.
- Manage views, as described in *Specify View Management Privileges*.

Specify Content Category Management Privileges

Select the **Manage Categories** option to grant all content category privileges, or specify individual privileges to allow users to delete, modify, and view category definitions.

Specify Content Type Management Privileges

Select the **Manage Content Types** option to grant all Content Type privileges, or specify individual privileges to allow users to delete, modify, and view Content Types, Content Type queries, Content Type schema, and associated XSL stylesheets.

Specify Data List Management Privileges

Select the **Manage Data Lists** option to specify that all data list privileges are available to users having this role, or specify individual privileges to allow users to delete, modify, and view data list definitions.

Specify Interface Management Privileges

Select the **Manage Interfaces** option to grant all interface management privileges, or specify individual privileges to allow users to modify and view category definitions.

Specify Task Management Privileges

Select the **Manage Tasks** option to grant all task privileges, or specify individual privileges to allow users to view the task Inbox and ignore and assign tasks.

Specify Token Management Privileges

Select the **Manage Tokens** option to grant all token management privileges, or specify individual privileges to allow users to delete, modify, and view tokens.

Specify Workflow Management Privileges

Select the **Manage Workflow** option to grant all workflow privileges, or specify individual privileges to allow users to delete, modify, and view workflow process definitions.

Specify View Management Privileges

Select the **Manage Views** option to grant all view privileges, or specify individual privileges to allow users to add, delete, modify, and view repository view definitions.

Select User and Security Management Activities

Specify user and security management privileges using the following settings on the Security Roles Properties page.

Select the **Manage Roles** option to grant all repository privileges, or specify individual privileges to allow users to add and view Security and Web Roles. For viewing security roles, only the currently-held role or those roles created by that user in the current session can be viewed. Security Roles cannot be deleted.

Select the **Manage User Groups** option to grant all repository privileges, or specify individual privileges to allow users to delete, modify, and view User Groups.

Select the **Manage Users** option to grant all repository privileges, or specify individual privileges to allow users to modify, and view Users and Web Users and Restore Users.

Select Content Management Activities

Specify access to content using the Content Management Activities section of the Security Role Properties page. The content management activities specified for a role determine which content menu options are displayed.

Select **Global Find and Replace** to grant permission for users with this role to create and execute Global Find and Replace operations.

Select the **Manage Content** option to specify that all content management privileges are available to users having this role, or specify individual privileges to allow users to delete, modify, and view content discussions, or view content.

Content Type Privileges

You specify repository content type privileges in the **Repository Content Type Privileges** section of the Security Role Properties page. This section lists each content type currently defined within the repository.

Select the appropriate options for each content type. The following table lists and describes the available privileges.

Content Type Privileges

Privilege	Description
View	Allows you to view the Content Type in the Content menu.
Translate	Allows you to create translated versions of articles in this Content Type for the locales specified in their user profiles. The Translate option of the Content Preview page displays only to authorized users.
Publish	Allows you to publish or unpublish articles in locales available to you.
Modify	Allows you to access the Add option in the Content menu.
Master Publish	Allows a user to publish or unpublish all locales of an article.
Manage Content Review Tasks	Allows you to create and manage content review tasks.
Import	Allows you to import data into the Content Type. You must also specify the View Data Menu privilege for users having the Import privilege.
Delete History	Allows you to remove content history records.
Delete	Allows you to delete articles from the Content Type.
Clear Check Out	Allows you to clear check outs by other users.
Batch View Update	Allows you to update the views associated with multiple articles.

Privilege	Description
Batch Category Update	Allows you to update the categories associated with multiple articles.

Select Workflow Approval Steps

You specify workflow process management privileges using the following settings on the **Security Roles Properties** page.

Select the **Manage Workflow** option to grant all workflow privileges, or specify individual privileges to allow users to delete, modify, and view workflow process definitions.

Specify workflow step privileges using the Workflow Approval Step section of the **Security Role Properties** page. The workflow approval section lists each content type within the repository that has defined workflow steps.

You can assign each step to one or more security roles. The repository view determines if the user is authorized to perform the workflow step for the selected repository view.

Note: Recommendation tasks are auto-assigned to the owner of the referenced article.

When you add a workflow process or a step within a process to a content type definition, you must manually update all security roles that will use the new step.

Select Collaboration and E-Marketing Activities

You specify collaboration and e-marketing privileges using the following settings on the Security Roles Properties page.

- Select the **Manage Content Type Alerts** option to grant all Content Type alert privileges, or specify individual privileges to allow users to delete, modify, send, and view Content Type alerts.
- Select the **Manage Forms** option to grant all form management privileges, or specify individual privileges to allow users to delete, modify, and view forms.
- Select the **Manage Ratings** option to grant all rating management privileges, or specify individual privileges to allow users to delete, modify, and view ratings.
- Select the **Manage Recommendations** option to grant all recommendation management privileges, or specify individual privileges to allow users to delete, modify, and view recommendations.

Form Privileges

You specify individual form privileges in the **Form Privileges** section of the Security Role Properties page. The section lists the forms that are currently defined within the repository.

The following table lists and describes the form privileges.

Form Privileges

Privilege	Description
View	Allows you to view the form in the Content menu.
Modify	Allows you to access the Add option in the Content menu.
Manage Content Review Tasks	Allows you to create and manage content review forms.
Import	Allows you to import data into the form. You must also specify the View Data Menu privilege for users having the Import privilege.
Delete	Allows you to delete forms from the Content Type.
Batch View Update	Allows you to update the views associated with multiple forms.
Batch Category Update	Allows you to update the categories associated with multiple forms.

List and View User Profiles

You can display information about user profiles by using the List option to locate users and selecting individual users from the list to display details.

You can also use the **Find** function to locate users.

Use the following procedure to display a list of user profiles.

1. Select **Web Users** or **Users** > **List**.

   Knowledge Advanced displays the selected users page, which lists all of the Knowledge Advanced users defined in the current repository. Knowledge Advanced creates multiple pages if necessary to accommodate as many users as defined in the system.
2. Select a user profile from the list to display detailed information.

   Knowledge Advanced displays the **User Properties** page.

Knowledge Advanced maintains detailed information about deleted users in the content history and version history pages.

Find User Profiles

You can locate individual users or groups of users by name and user ID using the Find option.

Use the following procedure to locate users.

1. Select **Web Users** or **Users** > **Find**.

   Knowledge Advanced displays the selected Find Users page.
2. Enter one or more of the search parameters listed in the User Profiles Search table.

   The following table lists the search fields and describes the input for each field.

   User Profiles Search

Search Field	Description
First Name	Enter a complete first name or an abbreviation, such as the first one or two characters.
Last Name	Enter a complete first name or an abbreviation, such as the first one or two characters.
User ID	Enter a User ID or an abbreviation, such as the first one or two characters.
Email Address	Enter a complete email address.

   You can restrict the search results by specifying the user's:

   - Default locale
   - Status
   - Assigned security roles

Modify User Status

You can view and change the status of individual users defined for your repository. Knowledge Advanced indicates user's user status as either **Active** or **Locked**.

- **Active** indicates that the user is able to log in and perform all of their allowed functions.
- **Locked** indicates that the user login failed more than five times. Knowledge Advanced notifies a system administrator when a user becomes locked. Locked users are not able to log onto Knowledge Advanced until a system administrator resets their status.

Here's how account locking works in Knowledge Advanced:

- A console user will be locked after five unsuccessful login attempts in B2C Service. This gets synchronized in Knowledge Advanced in the following scenarios:
  - When first time shadow account job runs, it updates the user status to Locked in Knowledge Advanced.
  - When a new console user with same login name logs in, then the previous user will be locked in Knowledge Advanced.

- A web user will be locked after five unsuccessful login attempts in B2C Service. Next time when a new web user logs in with the same login name, then the previous user will be locked in Knowledge Advanced.

The administrator can configure the number of invalid logins attempts using the Password Configuration editor accessed by clicking Configuration on the navigation pane and expanding Staff Management. By default, the number of invalid login attempts is set to 5.

User Profiles

You can edit some properties in the Console and Web user profiles.

Console User Profiles

You can edit the properties listed in the Console User Profiles table in user profiles.

The following table lists and describes the user profile fields you can edit.

Console User Profiles

Field	Description
Email	Enter the user's email address.
Default Locale	Select the default locale for this user. The list of supported locales is determined by the repository definition.
Select Content Locales	Select the locales in which this user is authorized to create and edit content. Users can view articles in any locale; however, they can create and edit articles only in the locales defined in their user profile.
Default View	Select the default view. Available views include the base repository and any other views defined within the base repository. The default view is used when there are multiple views in a repository.
Views	Select the views to enable for this user.
Reporting Group	Specify an optional reporting group for use within Analytics reports. You define Reporting Groups to group users having similar roles and responsibilities, such as Call Center Agent, Web Self Service User, etc. Analytics uses reporting groups to filter users within reports; reporting groups do not control users' access to content.
Security Roles	Select all applicable security roles to which you want to assign this user. When assigning security roles, you can assign only the roles to which you (the current user) have access.
Select Forms for Email Notifications	Select any forms for which the user should receive email notifications with the form data any time a form is completed on the web application.

Field	Description
Task Notifications	Select the appropriate notification options for tasks generated by the application. Specify to notify this user: • About all tasks that the user has privileges to perform. • About tasks explicitly assigned to this user.
Teams	Specify any work teams to which the user belongs. Assigning a user to a work team simplifies task assignment by limiting the list of available people to those belonging to a selected work team. You cannot assign tasks directly to a work team. If there are more than 100 work teams, you will see a search box you can use to locate a subset of the work teams.
Send subscription notifications	Use these options to specify how often the user receives email notifications for their subscriptions.

Web User Profiles

You can edit Web User Profiles as described in the Web User Profiles table.

The following table lists the Web User Profile properties that you can edit.

Web User Profiles

Property	Description
Default Locale	Select the default locale for this user. The list of available locales is determined by the repository definition.
Default View	Select the default view. Available views include the base repository and any other views defined within the repository.
Security Roles	Select a defined security role to which you want to assign this user. You can assign only the security roles to which you have access.
Send subscription notifications	Use these options to specify how often the user receives email notifications for their subscriptions.

Add MSQ Users

You can add a user to Manage Search Query (MSQ) access by following the same procedures to add other types of users, but including MSQ specifics.

1. Add a new or edit existing **Navigation Set** for the MSQ user. Make sure to select **Manage Search Query** (MSQ) to the navigation set.

   For information on Navigation Sets, see the *Oracle B2C Service Knowledge Advanced Implementation Guide*.
2. Add **Views** for the MSQ user. Make sure to select *all* views.

   For more information, see *Add a View*
3. Add **Locales** for the MSQ user. Make sure to select *all* locales.

   For more information, see *Choose the Working Locale*
4. Add **User Groups** for the MSQ user. Make sure to select *all* user groups.

   For more information, see *List and View User Profiles*
5. Create a **User Profile** for the MSQ user.

   For more information, see *List and View User Profiles*
6. Add a **User Account** for the MSQ user.

   At the Navigation panel select **Configuration, Staff Management , Staff Accounts by Profile**, and then click **New**. Complete the form, entering the MSQ profile you created in the **Profile** field. For more information on user accounts, see the About Required User Accounts and Privileges chapter in the *Oracle B2C Service Knowledge Advanced Implementation Guide*
7. Assign a **Console (administrator) role** for the MSQ user.

   For more information, see *Add Console User Roles*.

User Groups

User groups restrict access to specified content. For example, you could define a management user group, and designate sensitive content at the article level so that it can be accessed only by members of the management user group.

You can define user groups within Knowledge Advanced to restrict access to specified content to members of the user group.

> **Note:** User groups are primarily intended to restrict user access to content, for example, by defining members only content. However, you can define user groups to restrict access to content within Knowledge Advanced as well.

You implement user groups by performing one or both of the following actions.

- Defining one or more user groups
- Specifying one or more user groups within security role and web role definitions.

Add a User Group

Use the following procedure to add a user group.

1. At the **User** tab, select **User Groups**, and then **Add**.
   You can also select **User Groups**, **List**, and then select **Add User Group**.
   The **User Group Properties** page displays.
2. At the **Access Level Name** drop-down menu, select a user group.
3. Select **Save User Group Properties**.
   The new User Group name displays on the **User Groups** page.

Manage User Groups

You can view, modify or delete existing User Groups.

Display All User Groups

Perform this step to display all user groups.

- Select **User Groups**, then select **List**.

The **User Groups** page appears.

Modify a User Group

Use this procedure to modify a user group:

1. Select **User Groups**, **List**, and then select the view you want to modify.
2. Modify the properties as needed.

Delete a User Group

Use this procedure to delete a user group:

1. Select **User Groups**, **List**, and then select the view you want to delete.
2. Click **Delete**.
3. Select **Yes** at the Confirm Deletion message.

User Reputation Levels

User reputation refers to the ranking of users who create articles for your knowledge system, based on a point or level system. User reputation levels are based on the number of points a user accumulates. You can specify the number of points required for each level, and provide user friendly names for those levels.

Points are awarded to the user for the following actions.

- Content that the user has authored

- The number of views for content that the user has authored.
- The ratings for content that the user has authored
- The number of case links for content that the user has authored

Additionally, users can accumulate points by answering discussion threads, authoring highly rated content, or having postings flagged. Some activities provide a multiplier, so that you can reward points based on the weighting of a specific activity. Points can also be awarded separately for console users and web users.

You can edit the user reputation model levels for a repository on the User Reputations page.

Edit the User Reputation Model

Use the following procedure to edit the User Reputation model.

1. Select **Users** > **User Reputation** > **List**.

   The User Reputations page displays the default User Reputation levels, Content Rewards (rewards for working with the content), and Discussion Board Rewards.
2. To modify the default values, select **Override Default Reputation Model**.
3. Select **Edit Reputation Model**.
4. To edit the Levels, select and then assign values for these fields for each level. See the User Reputation Level Attributes table following this procedure for a list of the user reputation attributes.
5. To edit the Content Rewards, select and assign values for each activity in the Console Users and Web Users columns. See the Content Reward Attributes table following this procedure for a list of content reward attributes.
6. To edit the Discussion Board Rewards, select and assign values for each activity in the Console Users and Web Users columns. See the Discussion Board Rewards table following this procedure for a list of discussion board reward attributes.
7. Click **Save Reputation Properties**.

   The new values appear on the **User Reputations** page.

The following table describes the user reputation level attributes you can edit.

User Reputation Level Attributes

Field	Description
Level	Enter another level number, if desired, as well as a user-friendly name. You can also keep the default level number and just add the level name
Range	Select the number of points a user must have to belong to this level.
Description	Enter a description for the level.

The following table describes the lists the content rewards attributes you can edit.

Content Rewards Attributes

Activity	Description/Input
Content Authored	Enter the number of points to award for each content item the user has contributed.
Content Viewed	Enter the number of points to award each time a user's content is viewed.
Content Rated	This is the multiplier to use to weight user feedback ratings for content a user has authored. Enter the value for which you want to multiply.
Case Links	This is the multiplier to use to weight content a user has authored where a case link exists. Enter the value for which you want to multiply.

The following table lists describes the discussion board reward attributes you can edit.

Discussion Board Rewards Attributes

Activity	Description/Input
Message Solved	Enter the number of points to award each time a user's message provides a solution to an issue.
Message Helpful	Enter the number of points to award each time a user's message is helpful in providing a solution to an issue.
Discussion Board Rating	This is the multiplier to use to weight user feedback ratings for messages a user has authored. Enter the value for which you want to multiply
Message Created	Enter the number of points to award each time a user adds a message to a topic
Topic Created	Enter the number of points to award each time a user starts a new topic.

8 Analyze Knowledge Advanced

Knowledge Advanced Analytics

The Knowledge Advanced Analytics application uses packaged reports to show data from the Customer Portal (end users), Agent Desktop (agents), and interfaces customized for your organization. These reports provide data for knowledge analysts, authors, managers, and administrators who need to understand their knowledge base and perform the various tasks associated with configuring and maintaining it to optimal levels.

Access Analytics Reports

You connect to Analytics reports using the following procedure.

1. Open **Oracle Service Cloud**.
2. At the Navigation panel, select the **Analytics** button.
3. Select **Reports Explorer, Public Reports** and follow the path for each report.

To view the following reports, select **Common, Data Integration** and the report.

- Advanced Searches Summary
- Clicked Document
- Click-through Rate
- Article Aging
- Popular Answers
- Recent Questions
- Successful Questions for Search Recommendation
- Useful Articles for Search Recommendation

To view the following reports, select **OKCS** and the report.

- Answers by Category
- Answers by Product
- Answers Viewed by Category
- Answers Viewed by Product
- Article Incident Link
- Article Quality Index (AQI)
- Content In Process
- Feedback
- Intent Frequency
- Keyword Search
- Knowledge Consumption by Usergroups

- Low Score Popular Questions
- Recommendations
- Tasks
- Words Without Concepts

Note: You can also select the reports you use most often from the Analytics dashboards. For more information on dashboards, see *Analytics Dashboards Overview*.

Select Reports Filters

When you click an Analytics report, the **Filters** popup window opens. This window contains a set of filters that enable you to customize the data you see on your report. The filters are appropriate for each report. For example, if you select the *Answers Viewed by Category* report, you can select filters for the **Date** range you want to review, the available **Categories**, the **Date(s)**, and the **Interface**.

In most cases, all options are selected by default, but you can change the options as needed. You can change or modify your filter choices by selecting **Search** on an open report.

Analytics Report Filters

You can use filters to specify the criteria for a report, for example, a product line or category or date range. Report filters appear on the Filter window, which pops up when you open a report. Each report can have two or more filters, and several reports use the same filters.

Analytics Report Filters

Filter	Description
Activity Source	Selects the location, or source, of the user activity. • **End User**. The source of these activities is the Customer Portal. • **Agent**. The source of these activities is the Agent Desktop • **Unknown Activity**. Any activities that are not specific to Customer Portal or Agent Desktop, for example an interface or location customized for your organization.
Agent	Selects the agent's name.
Answer ID	Selects a range of article IDs to include in your report. For example, to see article IDs up to 300000, you enter **300000** in this filter field.
AQI Date Range	The date range for articles with the selected AQI score.
AQI Score	Selects the quality score assigned to the article.
Article Edit Date Range	Selects the dates range for last time an article was edited.
Author	Selects an author in various reports.

Filter	Description
Authoring Group	Selects the authoring group in various reports. These authoring groups might include a product group, a department, or locale.
Author Profile	Selects the author profile (a profile defines basic properties and behaviors such as the author's name, author group, and so on).
Categories or Category	Selects one or more business categories to include in your **Answer View by Category** and **Answer by Category** reports. A category is an attribute that enables you to associate content items with any characteristic or business requirement, such as product and model.
Completed by Account	Selects the person or group responsible for completing the task reflected in the report.
Completed by Account Group	Selects the group of the account associated with the report.
Date	Selects a date range for your report. The default date range for most reports is one week. Select the **Start** date of the range in the first box and select the **End** date of the range in the second box. You can also include a date value, such as adding two days from a specific date or adding three hours from a specific time. Select the **Relative** checkbox and then select the dates for your report. For more information on relative value, see *Documentation for Oracle B2C Service Products (Answer ID 5168)* to locate the documentation for your specific release, then use the Documentation Library or the Online Help User Guide link to locate the relevant topics.
Date Grouping	Selects how data is grouped on your report within the date range you selected. For example, to see articles viewed within a two -month range, grouped by each month, select **Month**.
Group	Selects the authoring or user group.
Interface	Selects the interface for your report. When you select an interface, only the data related to that interface displays in the reports. To select one or more interfaces: **New Installation**. If you are working with this version of the application as a new installation, you can select any number (or all) of the interfaces you need. The data from the selected interface(s) displays on the report. **Upgrade**. If you upgraded to this version the application from a previous version, you must select all Interfaces that display. The data from all interface(s) displays on the report. If you select only one or two interfaces, the data may not display.
Limit and Order	Selects the number of records that display on each page of the report and the order in which they appear. • Click **Limit** and enter the number of rows you want to appear on each page, and then click **Per Page** . • If necessary, change the order of the report data by selecting **Order By**For more information on the Sort options, see the Service Cloud User Guide at *Documentation for Oracle B2C Service Products (Answer ID 5168)* to locate the relevant guide.

Filter	Description
Minimum age of the documents in days	Selects articles based on the number of days that elapsed since they were published (age). For example, to see articles that were published 50 days from today's date, enter **50**.
Product	Selects products to include on the **Answer View by Product** and **Answer By Product** reports.
Search Scores Less Than	Enables you to enter a value for a specified search score. For example, if you want to display articles with search scores less than 3.0, you enter 3 in this field. The search score is an aggregate value that is compiled and generated by the application.
Source	Selects the source of a keyword. For example, to see keywords that endusers submitted from searching an external document, select **Enduser External Document Search**.
Status	The status of the tasks reflected in the report.
Window	Click one of the following options. • **Daily.** You can view daily report data. Daily data is available up to 45 days. • **Monthly.** You can view monthly report data. • **Yearly**. You can view yearly report data.

Analytics Dashboards Overview

Analytics uses dashboards to organize data into sets of relevant reports that appear on the *Content Analysis Dashboard* and the *Search Analysis Dashboard* . Using these dashboards enables you to see a wide range of data from different reports without opening each report individually.

These dashboards consist of the most frequently used Knowledge Advanced and Service Cloud reports, so not every report may appear on a dashboard. However, you can customize the dashboards by adding or deleting reports as needed. For complete instructions on creating, maintaining and using dashboards, see *Documentation for Oracle B2C Service Products (Answer ID 5168)* to locate the documentation for your specific release, and then read the Documentation Library or the Online Help User Guide link to locate the relevant topics.

To opens a dashboard, go to the Navigation panel and select **Analytics, Reports Explorer, OKCS, Dashboards, Content (or Search) Analysis** You can also set filters for the reports on the dashboard. Use the following procedures to set filters and open reports from the dashboard.

Set Filters for the Dashboard

You can set filters for some or all reports on the dashboard.

1. Select **Home, Search** in the ribbon and the Filter page opens.

   The filters for all reports appear on the filter pop-up on the dashboard.

2. Modify each filter as needed and click the **Search** button on the report.

   The changes are reflected in the reports.

Open a Report from the Dashboard

You can view data for a specific report without using the Report Explorer.

1. At the open dashboard, click the report you want to open.

   The **Report** option in the ribbon at the top of the screen appears.
2. At **Report**, click **Home**.
3. Click **Search** and select the filters as needed.
4. Click **Search**.

   You can now view the updated data on the selected report.

Analytics Dashboards and Reports

You can select an Analytics report from a folder or view several similar reports on a dashboard. You can also select reports from Agent Desktop if you enable Knowledge Advanced. The following topics describe the dashboards, components, and reports available in Analytics.

Content Analysis Dashboard

The reports on the Analytics Content Dashboard measure how customers and agents are interacting with knowledge base content. These reports can help you determine:

- The articles in your knowledge base that your users viewed the most and the least during a specified time period
- The average age (based on the publish date) of the articles in your knowledge base
- The status of articles in Knowledge Advanced workflows
- How customers and agents are rating the usefulness of the articles in the knowledge base

To access the Content Analysis dashboard, at the Navigation panel, select **Analytics, Reports Explorer, OKCS, Dashboards**.

Use Content Dashboard Reports

Content Analysis Dashboard Reports

Report	Report Description
Answers Viewed by Answers	Shows the total number of articles accessed from the end-user pages over a specified time period.
Article Incident Link	Shows how agents are using the articles in the knowledge base to link to incidents.
Answer Clickthrough Rate	Shows a list of end-user pages and actions, along with details about the visits for each page.

Report	Report Description
Content In-Process	Shows articles in the workflow process and potential workflow bottlenecks.
Article Aging	Shows the articles in your knowledge base with the number of days that elapsed since they were last updated.

Search Analysis Dashboard

The reports on the Search Dashboard display search data, which measures the effectiveness of your search engine and analyzes users' overall search experience. These reports can help you determine the following data.

- The answers most (or least) frequently returned to users' questions.
- How useful the answers are to users.
- The average number of attempts users needed to find desired answers.
- How the search application is performing overall.

To access the Search Analysis dashboard, at the Navigation panel, select **Analytics, Reports Explorer, OKCS, Dashboards.**

Search Dashboard Reports

The following table lists and describes the reports that appear on the Search Analysis dashboard.

Search Dashboard Reports

Report	Report Description
Searches Summary	Shows a list of searches performed during end-user visits along with the actions the user performed after doing a search.
Keyword Search	Identifies the keywords or phrases that users are searching for most often, and the number of articles in the knowledge base that address those keywords.
Low Score Popular Questions	Shows the frequent questions for which there are no high-scoring articles.
Questions Avoided	Shows how effectively your visitors are engaging with your site for self-service.
Words without Concepts	Shows a list of words that have no associated concepts or are not recognized by the Search Dictionary.

Advanced Search Summary Component

Sometimes your users ask questions to your knowledge base that have a relatively high number of searches but a low number of actual answers. These types of questions might benefit from tuning. Tuning a question means you rewrite the question to produce better answers. For example, for the following question:

How do I check to see if the battery is still good in my laptop?

you might tune to:

- Checking the battery in your laptop
- Changing the battery in your laptop
- Troubleshooting your laptop

A *component* provides additional functionality to your reports. This component is a report that has the same columns and functionality as the Advanced Searches Summary report, but it includes an **Action** column that contains the **Create MSQ Task** link. When you click this link, the application forwards the question to Manage Search Query (MSQ) for optimization tuning.

> **Note:** You must have the proper level of access in order to use the Advanced Search Summary component. If this component does not appear in your Reports Explorer, then you don't have the authority to submit questions for tuning.

Use the following procedure to submit a question for tuning.

1. Click the **Create MSQ Task** link in the **Action** column for the question you want to tune.
2. At the **Creating MSQ Task** popup window, select **Yes**.

The question is forwarded to the MSQ Task list. For information about tuning questions, see *Tune Questions with Manage Search Query (MSQ)*.

View Analytics Reports

Analytics reports present data in different configurations to enable you to analyze content and search activity in your knowledge base. Each report is listed here alphabetically, with conceptual information and descriptions of each report column.

Advanced Searches Summary

Sometimes your users ask questions that return a relatively high number of answers from your knowledge base, but they end up selecting a very low number of those answers. You can use this report to see the questions your users are asking, how many answers show up, and whether they selected any of the answers. It is sorted in descending order by the number of visits for each question.

You can view additional column details by drilling down on the links in the columns.

The following table lists and describes the columns in the report.

Advanced Searches Summary Report Columns

Column	Description
Search Question	The representative question. A representative question serves as a container for a group of actual questions with the same concepts and search engine attributes. For example, for the representative question, *How do I remove images from my mobile phone?*, the actual questions might be: • How do I delete photos on my mobile phone? • How do I remove pictures from my cell phone? • How do I select snapshots to delete from my mobile phone?
Number of visits	The number of visits in which users asked this question. A visit is the period of time a customer spends looking for a satisfactory answer to a question.
Number of results	The average number of answers returned for the question.
No Answer Viewed	The percentage of visits where users did not view any of the answers returned for the search question.

Agent Activities

Typically, agent activities include authoring articles, browsing articles, and clicking through answers. To see how well the agents are achieving their goals, use this report to analyze their activities such as:

- The number of articles an agent has authored, in total or during a specified time period.
- The number of clickthroughs or browses an agent has performed.
- The number, and text, of questions an agent has asked.
- How an agent's activities trend over time.

Note: You can sort the report by manager to see a team level view of agent activities. Select a manager at the Filter window.

Agent Activities Report Columns

Column	Description
Agent Name	The name of an agent. Select an agent name in the **Agent** menu on the Filters window.
Manager Name	The name of an agent's manager.
Questions Asked	The total number of questions an agent asked. Drill down in this column to view the question text in the *Questions Asked Drilldown*.
Search Click-thrus of Articles	The number of clickthroughs of search results an agent performed.

Column	Description
	Drill down in this column to view the article titles and their positions in the *Search Answers Clicked Drilldown*.
Articles Browsed	The number of articles an agent browsed from indirect results such as articles in a *Related Topics* list. Drill down in this column to view the number of articles agents browsed in the *Browse Answers Clicked Drilldown*
Articles Authored	The number of articles an agent created (authored). Drill down in the Articles Authored column to view the names of articles agents created in the *Articles Authored*.

Search Answers Clicked Drilldown

You can see the articles that an agent clicked from a list of search results. This report opens when you click the link in the **Search Clickthrus of Articles** column in the *Agent Activities* report.

Note: An article may show up more than one time in this list of articles because agents clicked it two or more times in different search positions.

Search Answers Clicked Drilldown Columns

Column	Description
Article ID	The article identifier.
Summary	The article title.
Search Result Position	The article's position in the search results list.
Question Text	The text of an agent's question.
Number of Clicks-thrus	The total number of times an agent clicked in the search results.

Browse Answers Clicked Drilldown

You can see the number of articles that an agent browsed (clicked through) from an indirect source such as a *Related Topics* or *See also* list. This report opens when you click the link in the Articles Browsed column in the **Agent Activities** report.

Browse Answers Clicked Drilldown Report Columns

Column	Description
Article ID	The article identifier.
Summary	The article title.
Number of Browse Clicks	The total number of times an agent browsed, or clicked an article from an indirect source, such as *Related Topics* or *See Also*.

Questions Asked Drilldown

You can view the actual text of the questions that an agent has asked. This report opens when you click the link in the **Questions Asked** column in the *Agent Activities* report.

Question Asked Drilldown Columns

Column	Description
Normalized Text	The keywords that an agent used when asking the question. The keywords in parentheses **( )** are unknown words, and the keywords in curly brackets **{ }** are words known to the dictionary
Question Text	The actual text of an agent's question.
Created	The date and time that an agent asked the question.

Articles Authored

You can view a list of articles that an agent has authored in a time period, along with details about the article. This report opens when you click the link in the **Articles Authored** column in the Agent Activities report.

Article Authored Report Columns

Column	Description
Article ID	The article identifier.
Summary	The article title.
Article Version	The updated or new version of the article.
Published on	The date on which the article was published.

Column	Description

Answers by Category

You can see the answers associated with a particular category in your knowledge base. A category is an attribute that enables you to associate content items with any characteristic or business requirement, such as product and model. This report lists each category and the number of answers associated with that category.

Answers by Category Report Columns

Column	Description
Category	A category in your knowledge base.
# Answers	The number of answers customers looked at that were associated with the category. Click the link in this column to see the answer titles and details.

View Answer Details

You can view the details of the answers in the *Answer by Category* report. Click the link in the # **Answers** column of the report to see the answer details such as the answer ID number, the article owner, and so on.

Answer Details Report Columns

Column	Description
Answer ID	The answer identifier.
Summary	The answer title.
Owner	The name of the user assigned as the article owner.
Date Updated	The date the article was last updated.
Language	The language of the answer.

Answers by Product

You can see the answers associated with a particular product in your knowledge base. This report lists each product and the number of answers associated with the product.

Answers by Product Report Columns

Column	Description
Product	A product in your knowledge base.
# Answers	The number of answers viewed that were associated with the product. Click the link in this column to see each answer title and details about each answer.

Answers by Product - Answers Report

You can see the details of the answers in the **Answer by Product** report. Click the link in the # **Answers** column of the report to see the answer details such as the answer ID number, the article owner, and so on.

Answers by Product - Answers Report Columns

Column	Description
Answer ID	The answer identifier.
Summary	The title of the answer.
Owner	The name of the user who assigned as the article owner.
Date Updated	The date the answer was last updated.
Language	The language of the answer.

Answer Viewed by Category

You can determine which answers in your knowledge base that users are selecting most often, as well the answers that users are not selecting. Use this report to see the number of answers users selected in a time period, by category, as well as the answers they did not select.

Note: You can see the same report information for products by selecting the *Answers Viewed by Product* report.

Answer Viewed by Category Report Columns

Column	Description
Category	The category you selected on the **Filters** window. A category is an attribute that lets you associate documents with any characteristic or business requirement, such as product and model.
Date	The date of the answers viewed for the date grouping you selected. For example, if you select the date group *Month*, you see the number of answers viewed for each month within the date range.
Answers Viewed	The number of answers users looked at, in a category. Click on a value in this column to see the rank of each answer on the report.

Answer Viewed by Category - Answers

You can see how users evaluate the usefulness of the answers, by category, in your knowledge base. Use this report to see how many times users selected the answers, and how they ranked each answer. A rank is an assessment of how useful the answers were to users, based on the a five-star rating, where five stars means an answer was very useful and one star means it was not useful.

This report opens when you click the link in **Answers Viewed** column of the **Answer Viewed by Category**.

Answer Viewed by Category Answers Report Columns

Column	Description
Answer #	The answer ID number.
Summary	The title of the answer.
Hits	The number of times users looked at the answer.
Rank #1 Count	The number of times a user answered a question, such as, *How well did this answer your question?* by selecting the lowest of the configured number of options. If there are only two options configured, this value is **No**. If there are five options configured, this value is **1 Star**.
Rank #2 Count	The second lowest of the configured number of options. If there are only two options configured, this value is **Yes**. If there are five options configured, this value is **2 Stars**.

Column	Description
Rank #3 Count	The third lowest of the configured number of options. This value is **3 Stars**.
Rank #4 Count	The second highest of the configured number of options. This value is **4 Stars**.
Rank #5 Count	The highest of the configured number of options. This value is **5 Stars**.

Answers Viewed by Product

You can determine which answers in your knowledge base that users are selecting most often, as well the answers that users are not selecting. Use this report to see the number of answers users selected in a time period, sorted by product.

Note: Note: You can see the same report information for categories by selecting the **Answers Viewed by Category** report.

Answers Viewed by Product Report Columns

Column	Description
Product	The product you selected on the **Filters** window.
Date	The date of the answers viewed for the date grouping you selected. For example, if you select the date group *Month*, you see the number of answers viewed for each month within the date range.
Answer Viewed	The number of answers the users looked t for the product within a time period. Click a value in this column to see the titles of the answers users looked at on that date, and the ranking of each answer.

Answer Viewed by Product - Answers

You can see how users evaluate the usefulness of the answers, by product, in your knowledge base. Use this report to see how many times users selected the answers, and how they ranked each answer.

A rank is an assessment of how useful the answers were to users, based on the a five-star rating, where five stars means an answer was very useful and one star means it was not useful.

Answer Viewed by Product - Answers Report Columns

Column	Description
Answer #	The answer ID.
Summary	The title of the answer.
Hits	The number of times users looked at the answer.
Rank #1 Count	The number of times an end-user answered a question such as *How well did this answer your question?* by selecting the lowest of the configured number of options. If there are only two options configured, this value is **No**. If there are five options configured, this value is **1 Star**.
Rank #2 Count	This is the second lowest of the configured number of options. If there are only two options configured, this value is **Yes**. If there are five options configured, this value is **2 Stars**.
Rank #3 Count	This is the third lowest of the configured number of options. This value is **3 Stars**.
Rank #4 Count	This is the second highest of the configured number of options. This value is **4 Stars**.
Rank #5 Count	This is the highest of the configured number of options. This value is **5 Stars**.

Article Aging

You want to keep your knowledge base current and relevant to provide the best answers for your users. This report shows the articles in your knowledge base with their age, or number of days that elapsed since they were last updated. This report helps you determine the following information.

- Which articles in your knowledge base require an update.
- Which articles should be removed from the knowledge base.
- Whether articles that users do not frequently view are properly indexed and searchable in the application.

Article Aging Report Columns

Column	Description
Answer ID	The answer identifier.
Summary	The title of the article.
Views	The number of times users looked at the article. **Note:** This column displays on the *Filter* reports only.
Aging Days	The number of days since the content was last updated (published).
Last Viewed	The date the users last looked at the article.

Articles Created and Updated

You can analyze the productivity of your organization's authors and owners by looking at data for newly created and updated articles. You can view details such as article titles, authors' managers, content locale, and create or modified dates. Use this report when you wantt to:

- Compare the productivity of different authors.
- Compare the productivity of different managers and departments
- Analyze author productivity over time.

Note: You can sort this report by manager name to compare the productivity of different departments.

Articles Created and Updated Report Columns

Column	Description
Article ID	The article identifier.
Articles Owned	The number of articles an author owns.
Articles Authored	The number of articles an author created.
Content Locale	The author's locale (language and country).
Article Version	The updated or new version of the article.

Column	Description
Date Modified	The article creation or modification date.
Manager	The author's manager.

Author Statistics

How do you measure an author's productivity during a certain time period? Use this report to see a comprehensive view for one or all your authors' productivity and participation. It provides statistics that help measure productivity, such as the number of articles an author has created, or the total number of views for an article. This report helps you:

- Measure the overall output from your authors within a specified time period
- Analyze an individual author's productivity
- Compare the article output among selected authors and time periods

You can select individual authors or all authors in the **Author** dropdown menu, and the time period data to view (Daily, Monthly, Yearly) in the **Window** field on the Filters page.

Author Statistics Report Columns

Column	Description
Author	The author's name.
Articles Owned	The number or articles an author owned.
Articles Authored	The number of articles an author has created in the specified time period.
Article Caselink Count	The number of times an article was linked to a case.
Articled Viewed	The number of times users looked at an author's article.

Article Incident Link

You may need some insight on how agents are using the articles in the knowledge base. The number of incidents (service requests) linked to an article indicates its value to agents; one or more incident links indicates that an article is effective in providing solutions to customers.

This report lists the articles that agents have linked to incidents most frequently, and is sorted by the **Incident Link Count** column.

Article Incident Link Report Columns

Column	Description
Answer ID	The answer identifier.
Doc ID	The document identifier.
Summary	The article title.
Views	The number of times agents looked at the article.
Incident Link Count	The number of times agents provided an article as an answer by either appending the answer text or a link to the answer to an incident.

Article Quality Index

How useful are the articles in your knowledge base? Are they clear, accurate, and well-written? Are they helping your customers solve their problems? As a Knowledge manager or authoring coach, you can quickly review the quality of the articles in your knowledge base by using the Article Quality Index (AQI) report.

This report shows the AQI scores assigned to any version of the articles in your knowledge base. An AQI score is a required component of KCS compliance that measures the quality of a knowledge article. You can filter the report to see specific data that can help you identify articles that have quality issues, for example:

- You can filter by articles that have specific AQI values; for example, you might want to see all articles with an AQI value of 10 (which depending on your organization's interpretation could be a strong score or a weak score). If more articles are displaying low AQI scores, you can asses training opportunities for your authors.
- You can filter by author or group of authors to see how their AQI scores are trending over a time period.
- You can filter by article version to monitor how an article's AQI score is trending for each subsequent version.

You can also use the AQI data in the Data Dictionary to build custom reports.

The following table lists the columns and column descriptions in this report.

Article Quality Index Report Columns

Column	Description
Document ID	The identifier for the article.
Article Version	The article version.
Article Summary	The title of the article.
AQI Score	The AQI score assigned to the article.

Column	Description
AQI Date	The date the AQI scored was assigned to the article.
AQI Comment	Comments that provide details about the AQI score.

Daily Question Sessions

For some projects you may need specific data on the number and type of questions users asked on a specific date. For example you may want to measure the number of questions asked that are associated with a new product or service. This report provides data that shows the number of questions users asked on a daily basis, and the number of unique search events, or sessions, in which the questions were asked.

Using this report helps you understand how your users are engaging with your knowledge base by:

- Determining the number of questions users are asking daily in a specified time period.
- Determining the number of unique search sessions users are performing daily in a specified time.
- Determining the number of unique questions asked in each session.
- Viewing the question details, including the actual question text.

The data in this report is sorted in ascending order by date, although you can change the sort order if necessary. You can drill down on the **Total Number of Questions** column to open the **Question Detail** report to view the text of each question asked on that day, sorted in the ascending order of the **Phrase Stem**.

Daily Question Sessions Report Columns

Column	Description
Date	The date the questions were asked.
Total Number of Questions	This is the total number of questions asked on this day. Drill down on this column to view the text of each question.
Total Number of Unique Questions	The number of questions asked during the specified period that were unique. For example, if 100 questions were asked during a specified period but 20 of those questions were the same, this number is 80.
Total Number of Unique Sessions	The number of sessions users performed during the specified period.

Viewing Question Details Text

When you drill down on the **Total Number of Questions** column, the **Question Detail** report opens. This report shows the actual text of each question asked on the day you select.

Question Details Report Column

Column	Description
Question Text	The actual text of the question asked.
Phrase stem	A question in which the application removes case distinctions, spelling errors, punctuation, skipped words, and other elements that may differentiate it from otherwise identical questions; similar user questions are reduced to a single normalized question. The phrase stem displays in the following notation: • **Concepts.** Dictionary objects that define meanings of words and phrases. Many of these concepts are inherited from the industry dictionary associated with your site, and some are user defined. Concepts appear in curly braces **{ }** • **Unknown Words.** Words that are not defined or known to your search engine. These words appear in parentheses **( )**.
Question Count	The number of times a question was asked on a specific date.

Feedback

You can view and analyze customer feedback on articles to understand how to improve your knowledge base. Customers can add feedback when they rate the article. Using this report helps you perform tasks that:

- Determine an overall rating for an article.
- Analyze the feedback for articles, by product or category.
- Understand which authors and authoring groups generate the most positive or negative feedback.
- Understand which areas in the knowledge base need improvement.

Feedback Report Columns

Column	Description
Created	The date and time that a user created the feedback.
Document Ref	The document reference number, or document ID, of the article.
Rating	The rating number that a customer gave the article.
Feedback	The feedback that a customer gave the article.
Author	The author of the article. Select the author in the **Filters** window. **Note:** This is a roll-up field so it appears as a row. You can view the feedback for several authors at the same time.

Intent Frequency

You can help optimize your knowledge base by analyzing the types of intents user questions triggered most often, and how many user questions trigger a particular intent. These results can help you tune your knowledge base.

This report lists and identifies intents by name, intent ID, and frequency. An intent, like a rule, determines how the application interprets and responds to user questions. An intent typically captures a family of questions that the application recognizes as a single dictionary object. For example, a *bill inquiry* intent might match questions about bill balances, bill payment options, and payment deadlines.

Intent Frequency Report Columns

Column	Description
Intent ID	The unique identifier for the intent.
Intent Name	The full name of the intent as it appears in the Search Dictionary.
Frequency	The number of times the intent was triggered for a question.
Date Triggered	The date the intent was triggered.
Question Count	The number of questions that triggered the intent.

Articles at a Workflow Step

A workflow consists of a sequence of steps that manage a publishing lifecycle, such as Authoring or Editing steps. Each step defines a task that is assigned to a user or users. This report helps you identify and assess potential workflow process bottlenecks, such as:

- Is a particular article or article type moving more slowly through the workflow than other types?
- Are some owners less efficient than others in completing workflow tasks?
- Is a particular workflow step slowing the progress of a large number of articles, compared to other steps?

Use this report to see the knowledge base articles that currently reside in a specified workflow step, and the number of days that the article has spent at the step. It is sorted by the workflow steps.

Articles at a Workflow Step Report Columns

Column	Description
Article ID	The unique article identifier.

Column	Description
Article Title	The article title.
Last Update By	The name of the last person who updated the article
Article Owner	The name of the article owner.
Flow:Step Name	The name of the workflow: the name of the workflow step.
Days Since Update	The number of days since the article was last updated.
Days at Step	The number of days the article has been at this workflow step.

Clicked Documents

Perhaps you want a quick look into whether users are selecting more answers from your knowledge base or from external sites. You can use this report to see the number of times users looked at an answer, and if the article is located in the knowledge base or an external site. It shows the number of knowledge base and external answers your users clicked in a time period. It also provides the URL to the answer.

Clicked Documents Report Columns

Column	Description
Answer ID	The article identifier.
View Count	The number of times users selected an answer.
Document URL	The URL for the Knowledge Advanced or external answer.

Click-Through Rate of External Documents

To determine whether users are finding the answers they need in the knowledge base or if they are going to external sources, you might review the title summary and click-through rate for articles from external sites. Use this report to see summary text of the external articles users clicked through, and the default sort is by the articles selected most often.

Click-Through Rate of External Documents Report Columns

Column	Description
Answer Summary	The summary text of the answer.
Click-through Rate	The click-through rate for the answer. A click-through rate is the ratio of the number of times the answer displays and the number of times users clicked it. For example, if an answer displays 100 times and users click it 50 times, the click-through rate for that answer is **.5**.

Customer Activities Report

There are times that you need to analyze customer activities data, specifically the t ypes of questions they asked and how successful they were in finding answers. Use this report to review data from users who submitted questions to the customer portal. For example, you can see customer names and how many questions they asked, in a time period. Or, you can see how often they clicked on the list of answers the application returned. Click the link that appears in some of the columns to see the detail data.

Customer Activities Report

Column	Description
Customer Name	The name of the end user customer.
Contact ID	The organization's identification number for the customer.
Questions Asked	The total number of questions the customer asked. Click the link in this column to see the text of the customer questions in the **Questions Asked** report.
Search Click-thrus of Articles	The number of clickthroughs of search results the customer performed. Click the link in this column to see the article titles and their positions in the **Search Answers Clicked** report.
Articles Browsed	The number of articles the customer browse from indirect results, such as articles in a *Related Topics* list. Click the link in this column to see the number of articles agents browsed in the **Browse Answers Clicked** report.

Browse Answers Clicked Report

You can see the list of articles that customers browsed. Browsing is the action of clicking through articles that are not directly in search results, for example articles in a *Related Articles* list or *See also* link. You open this report by clicking the link in the **Articles Browsed** column in the Customer Activities report.

Browse Answers Clicked Report Columns

Column	Description
Article ID	The unique identifier of the browsed article.
Summary	The title of the browsed article.

Search Answers Clicked Drilldown Report

You can see the details about the articles customers clicked in the search results. This report opens when you click the link in the **Search Clickthrus of Articles** column in the Customer Activities report.

> **Note:** An article may show up more than one time in the list of articles because customers clicked it two or more times in different search positions.

Search Answers Clicked Drilldown Report

Column	Description
Article ID	The article identifier.
Summary	The article title
Search Result Position	The article's position in the search results list.
Question Text	The text of the customer's question.

Questions Details Report

You can view the actual text of the questions that a customer has asked. This report opens when you click the link in the **Questions Asked** column in the *Customer Activities* report.

Column	Description
Normalized Text	The keywords the customer used to ask the question. The keywords in parentheses **( )** are unknown words, and the keywords in curly brackets **{ }** are words that are known to the dictionary.

Column	Description
Question Text	The actual text of the question that the customer asked.
Created	The date the customer asked the question.

Keyword Searches - Search String

You can see details for each phrase stem listed in the *Keyword Searches* report. This report opens when you click on the value in the **Answers** column.

This report shows the search string(s) and number of answers associated with the phrase stem. For example, for a phrase stem *{install} {set up} {PRODUCT_ABC Mobile Phone Co}*, a search string might be *How do I set up my new phone*, and the number of answers might be *10*.

Keyword Searches Search String Report Columns

Column	Description
Search String	The search strings associated with the phrase stem. **Note:** A search string is a normalized question.
Search Count	The number of times users performed a search on the question (search string).
Answer	The total number of answers that were returned for this question (search string).

Keyword Searches

Your customers use common words or phrases, or keywords, in their searches. This report identifies the keywords or phrases they use most often, and the number of answers in the knowledge base that apply to the keywords.

The application displays the keyword as a stem word. The stem of a word is the root form of the word without any affixes. For example, the word *work* is the stem for the words *works*, *working*, and *workplace*.

Keyword Searches Report Columns

Column	Description
Phrase Stem	The phrase stem that your users searched during the date range you select on the Filters window. A phrase stem shows words sharing the same or similar root. A phrase stem also can be a product or product name.

Column	Description
Search Count	The number of searches that included the phrase stem. **Note:** The values in this column may not match the values in **Answers** column. This happens because this column shows the *total* number of answers to a question, including answers users may not be able to access such as similar question links or filtered subsets. Therefore, this column helps you identify the total number of answers for the question, not the number of answers your users actually accessed.
Answers	The number of answers that Analytics returns for the keyword. Select the link in this column to see the search string for this answer.

Knowledge Consumption by Usergroup

A user group is a group of users that has specific types of content and accessibility associated to it. For example, a user group named Gold Users may have access to the all the content available on your site, and a user group named Silver Users may have access to less content, and so on. Or, a user group named Technical may have access to confidential content on your site that is not available to the user group Sales.

So, how are your user groups consuming articles? Are customers in some user groups reading more articles than those in other groups? Are customers finding the information they need? Use this report to analyze how your users consume (read or link to) your site's content. It shows data for the articles associated to and viewed by each user group.

It can help you resolve issues such as which user groups consume the most articles, how many articles a particular user group consumed during a date range, or how the knowledge consumption for certain user groups trends over time. For example, if customers in a user group are looking at less articles over time, could this indicate that your site's content should be updated?

Knowledge Consumption by User Group Report Columns

Column	Description
User Group	The name of the user group and answer access level. An answer access level restricts customer access to identified information.
Number of articles in user group	The total number of articles in the knowledge base that are associated to a selected user group.
Number of articles viewed	The number of articles associated to a selected user group viewed by users.
Clickthru Count	The number of times users selected, or clicked through, an article in a list of search results.
Browse Count	The number of times users select answers from sources other than the application's list.
Consumption Ratio	The percentage of total knowledge base views each user group performed.

Column	Description

Least Useful Articles

You may want to review which articles users selected least often to help analyze the health of the knowledge base. This helps you identify poor-performing articles and determine whether they should be updated or deleted.

Use this report to help you in your reviews, specifically to identify the articles in your knowledge base that users found least useful, based on the reporting characteristics such as:

- How many times have users clicked on an article?
- How many users actually read, or even looked at an article?
- Are users finding the articles helpful? How well did they rate them?

You can change the **Sort** arrow for any of the columns to view the least useful articles based on a characteristic. For example, if you want to see the articles that were rated lowest by your customers, select the arrow in the **Rating** column and the report sorts data by rating.

Least Useful Articles Report Columns

Column	Description
Summary	The title of an article.
Views	The number of times users looked at this article.
Incident Count	The number of incidents linked to an article. An article link indicates the value to agents; the more links to the article, the more effective the article is in providing solutions.
Click-thru Rate	The ratio of the number of times users clicked an article to the number of times the article appeared in the search results.
Rating	An assessment of how useful the answers were to users. It's based on a five-star rating, where five stars means an answer was very useful and one star means it was not useful.
Age	This is the number of days since the article was last updated (published).

Most Useful Articles

You can review how well your customers or agents are interacting with the articles in your knowledge base. For example, you might want to know which articles are users selecting and viewing most often.

Use this report to help analyze the knowledge base and identify the articles that users found most useful based on the reporting characteristics. It helps you identify authors and user groups that are producing high-quality answers, and use these articles as examples and templates to other groups.

You can change the **Sort** arrow for any of the columns to view the most useful articles based on characteristics. For example, if you want to see the articles that were rated highest by your customers, select the arrow in the column **Rating** and the report sorts by rating.

Most Useful Articles Report Columns

Column	Description
Summary	The title of the article.
Views	The number of times a customer viewed this article.
Incident Count	The number of incidents linked to an article. An article link indicates the value to agents; the more links to the article, the more effective the article is in providing solutions.
Click-thru Rate	The ratio of the number of times users clicked an article to the number of times the article appeared in the search results.
Rating	An assessment of how useful the answers were to users. It's based on a five-star rating, where five stars means an answer was very useful and one star means it was not useful.
Age	The number of days since the article was last updated (published).

Popular Answers

You want to analyze the knowledge base answers to ensure that users are successful in their searches. For example, you might want to know the number of times users looked at an answer and the question that prompted that answer. Or, you might want to read the text of an answer that's popular with users.

Use this report to see the questions that users asked and the answers the application returned most often in a time period. It also includes a link to the knowledge or external answer. You can compare the popular answers over time to determine how the answer popularity is trending over time

Popular Answers Report Columns

Column	Description
Answer ID	The answer ID.
Question	The text of the question a user asked.
View Count	The number of times users viewed an answer.

Column	Description
Document URL	The URL for the knowledge base or external answer.
Answer	The title of the answer.

Questions with Low Score Answers

You can assess gaps in your knowledge base by identifying the questions users asked frequently and the application returned little or no high value answers. If you find that many users are asking the same or similar questions and the best answers in your knowledge base are less than the threshold score, you can take steps to improve or update the content or tune the indexing options.

This report shows a list of normalized customer questions that returned answers with scores of less than the predetermined threshold for search scores.

What are Search Scores?

A search score is determined by various rules, each of which contributes to a total score for each document in the knowledge base. It represents how efficiently each answer responded to a question; the higher the score the more useful the answer. The application applies a search score to each answer.

You set a threshold score on the **Search Scores Less Than** field on the Filters popup window. For example, to see all answers with a score less than 3.0, you would enter 3.0 in the field.

Questions with Low Score Answers Columns

Column	Description
Normalized Question	A question from which the application has removed case distinctions, spelling errors, punctuation, skipped words, and other elements that may differentiate it from otherwise identical questions. For example, for these questions: • What should I do to delete a photo from my cellphone? • How do I delete photos from my mobile phone? • Can I take pictures off my cellphone? the normalized question might be, *Deleting a photo*.
Question Count	The number of questions that matched the normalized question, and whose top five answers had scores less than the threshold score.
% Question Count	The percentage of questions that match the normalized question.
Click-thru Rate	The percentage of questions that matched the normalized question and received at least one click-through.

Recent Questions

To help keep your knowledge base healthy and updated, you need to analyze the questions your users are asking as well as the answers. You might consider points such as:

- How many questions did users ask during a time period?
- What questions did they ask? Are several users asking similar questions?
- In which interfaces did users ask questions?
- How does this number of questions compare with the previous time period? Let's say you select a period of 30 days; how do the numbers compare to the previous 30 days? Are they trending up or trending down?

Use this report to see the questions users asked in a period, and the interfaces they used to ask the questions. You can see the question text in normalized text and actual text.

The following table lists and describes the report columns in the report.

Recent Questions Report Columns

Column	Description
Interface Name	The name of the interface associated with the actual question. An interface is the console, windows, and pages you use to access the application.
Actual Question	The non-edited actual question a user asked.
Normalized Text	The actual question without case distinctions, spelling errors, punctuation, skipped words, and other elements that may differentiate it from an otherwise identical question.
Actual Question Count	The number of questions users asked.
Search Date	The date a user asked the question.

Recommendations

You can review and analyze recommendations from creation to completion. Users can create recommendations to request a new article or updates to a current article, for example, to correct a procedure or add information.

Use this report to analyze user recommendations to articles in the knowledge base. You can find data such as:

- How many recommendations are new?
- How many recommendations are completed or updated?
- Which authors or authoring groups have completed the most recommendations?
- What is the substance of the recommendations? For example, are users consistently updating your procedures?

Recommendations Report Columns

Column	Description
Created	The date and time that a customer created a recommendation.
Updated	The date and time that an author updated an article with a recommendation.
Priority	The priority that a user sets for the recommendation. A user may select **Low**, **Medium**, or **High**.
Title	The title of the recommendation.
Comments	Optional comments about the recommendation.
Requested By Name	The full name of the user that requested or created the recommendation..
Completed By	The full name of the author that completed the recommendation.

Successful Intents

When a customer asks a question on a customer portal, the application may return defined intents among the list of answers. An intent is a dictionary object that represents a set of related questions that are inked to articles that provide an answer.

You can analyze how customers are using the intents and how successful the intents are in answering their questions. Use this report to analyze how customers are using intent responses and how successful the intents were in answering their questions. An intent is considered successful when customers selects one or more of its responses; the more responses customers clicked, the more successful the intent.

This report is sorted by the values in the **Success Rate** column. You can click the **Sort** arrow in this column to display the least successful intents.

Successful Intents Report Columns

Column	Description
Intent Response	A collection of answers that are predefined for the intent. You can create and manage intent responses as single entities. Intent Responses can be assigned to one or more specified Intents.
Success Rate	The success of the intent. It is a ratio of the **Click-thru Count** value and the **Display Count** value.
Click-thru Count	The number of times users clicked the **Intent Response**.
Display Count	The number of questions that triggered the intent response.

Column	Description
Intent	The name of the intent that triggered the **Intent Response**.

Successful Questions for Search Recommendation

A successful question is one for which Analytics returns at least one answer. Since questions are an important part of your overall analysis of how users are interacting with the knowledge base, you want to determine the questions that returns the best answers.

Use this report to determine the components of successful questions in a 60–day time period, and how to tune similar questions. By tuning your questions, you optimize the search experience for your users.

Successful Questions for Search Recommendation Report Columns

Column	Description
Normalized text	The actual question with case distinctions, spelling errors, punctuation, skipped words, and other elements that may differentiate it from an otherwise identical question.
Interface	The name of the interface in which the question was asked. An interface is the console, windows, and pages you use to access the application.
Rep Question Count	This is the number of representative questions that users asked. A representative question designates a group of actual questions with the same concepts and search engine attributes. For example, for the representative question, *How do I remove images from my mobile phone?*, the actual questions might be any of the following: How do I delete photos on my mobile phone? How do I remove pictures from my cell phone? How do I select snapshots to delete from my mobile phone?
Question CT Rate	The click-through rate, or the percentage of questions that matched the normalized question and received at least one click-through.
Average CT Position	The average location of all the clicked positions for each question asked. This data shows how far down the list of answers the user needs to click to find most useful answer. A clicked position is the number of answers clicked for a question. For example, for *Question A*, the user clicks on *Answer 1*, *Answer 2*, and *Answer 3*; the average click-thru position is the sum of the answer positions (in this case 1+2+3=6) / (divided by) the number of clicks (3), so the average click-through position is **2**.

Submitting a Question for Tuning

It is rare that users ask a common or frequently-asked question and then do not (or rarely) select any of the answers that are returned. For example, if the question *Do you have a booster plan?* returns several answers about family plans but users do not select any of those answers, you might tune this question by adding concepts or synonyms.

The application provides a component named Advanced Search Summary that displays a list of user searches in a specified time period. This component looks like an Analytics report but includes an **Action** column that contains a **Create MSQ Task** link. When you select this link, the application forwards the question to **Manage Search Query (MSQ)** which is the tool you use to tune questions.

> **Note:** Although they are very similar, the Advanced Search Summary *component* is different from the Advanced Searches Summary *report*. The report is available to all users and the component is available to users with the proper roles, as determined by your company.

To use this component, you must be able to access to it. If you do not see the Advanced Search Summary in your Report Explorer, then you do not have the authority to submit questions for tuning.

Tasks

You can monitor the progress of the Knowledge tasks to track what your team is working on. There are several types of tasks, including *Workflow*, *Review*, *Translation*, and so on. This report answers questions such as:

- How many total tasks are in progress? How long have they been in progress?
- Which group or account has closed the most tasks?
- What is the status of selected workflows?
- What is the status for each task in a type? For example, what is the status of all *Translation* tasks, or all *Review* tasks?

The following table lists and describes the columns in the report.

Tasks Report Columns

Column	Description
Task Number	The unique task identifier.
Status	The status of the task. Select one of the following: • New • Open • Unassigned • Ignored • Closed

Column	Description
Assigned Name	The account assigned to the task.
Age in days	The age, or number of days, of the task.
Comments	Optional comments about the task.
Type	The type of task. Select one or more of the following task types in the **Search** window: • Workflow • Translation • Content Expiration • Workflow Changed • Workflow Expiration • Review Date • Rating Analysis • Content Recommendation • Content Change • Lost Password • Inactive Account • Survey Answer • Subscription • Forum Moderation • DBForum Moderation **Note:** This field is a roll-up field so it appears as a row. It enables you to view several task types at the same time.

Useful Articles for Search Recommendation

You can analyze how your users interact with your knowledge base (for example rating an article or linking an article to cases) to evaluate how well the articles are answering your users' questions. This data that identifies the most useful articles in each interface and how to position them in your knowledge base. Use this report to analyze:

- All the articles the users found useful, based on the number of times the articles were viewed and linked to other answers.
- The average feedback scores for the articles.
- The number of days the articles have resided in the knowledge base.

Useful Articles for Search Recommendation Columns

Column	Description
Title	The title of the article.
Interface	The name of the interface where the article resides. An interface is the console, windows, and pages used by your organization and customers to access the application.
View Count	The number of time users viewed the article.
Aging Days	The number of days since the content in the article was last updated (published), or how long the current article has resided in the knowledge base.
Average Feedback	The average rating for the article calculated from user feedback (for example, Rating 1–5, or one star to five stars).
Number of Cases Linked	The number of cases to which the article is linked.

Words without Concepts

You may encounter words that have no associated concepts or are not recognized by the knowledge base; these are unknown words. Use this report to see the number of unknown words and where in the knowledge base they exist. and identify the areas of the knowledge base that might require tuning. For example, you might tune the unknown words by applying concepts to them.

In addition to the unknown words, this report shows the number and percentage of questions that contain unknown words in the specified date range. It is sorted by the number of questions with the unknown words (Question Count column) so you see the words used most often in user questions at the top of the report.

Words without Concepts Report Columns

Column	Description
Search Words	The words that are not recognized in your knowledge base.
Question Count	The number of questions that contain the unrecognized word.
% Question Count	The percentage of questions that contain the unrecognized word.
Click-through Rate	The percentage of questions that contain the unrecognized word when clicked at least one time.

Set the Daily Event Transaction Purge Interval

You can specify the number of days that daily event transactions are stored in the database before they are purged. This default for this setting is 60 days. You can set a value in the range of 7 to 90 days.

1. At the Navigation panel, select **Configuration, Site Configuration, Configuration Settings**.
2. At the **Search** popup window, accept the default of all filters selected, or select the filters you prefer.
3. At the **Configuration Settings** screen, select items from the filters at the top of the page to narrow your search.

   The Filter items are listed on the Configurations Setting Screen Columns table that follows this procedure.
4. Select **Search**.

   The list of common OKCS Settings displays.
5. Select the **OKCS_PURGE_DAYS** setting.
6. At the Configuration Entry Information screen, at the **Default** field, select the value you want.
7. Select **Save**.

Configurations Setting Screen Columns

Column	Description
Configuration Base	• If **All** is selected, leave as is • If **All** is not selected, select your Analytics version
Type	If All is not selected, select **Interface** and **Site**.
Key	Enter **OKCS***.
Folders	Select **All**.

View Analytics Data Tables

You can see information on how each report is constructed. This information includes the data tables and filters used for each report, as well as the expressions and data types used for each column. Administrators in particular will find this information useful.

- To view data table and column information on an open Analytics report, select **Definition, View** at the top of the screen. All of the table and filter information for the report displays.
- To view data table and column information from the Data Dictionary, in the Navigation panel, select **Configuration, Database, Data Dictionary** and then scroll to find the data tables. The data table or column information displays. Most Analytics data tables have an *okcs* prefix.

When you create an analytics report, the data tables return data from the previous 90 days. However, the following data tables will return data from the latest 100, 000 records:

- OKCS Tasks (okcs_tasks). The tasks set up for articles.
- OKCS Content Locale Requests (okcs_content_locale_requests). Article translation requests.
- OKCS Recommendation (okcs_recommendations). The content recommendation data created in the KA Authoring database.
- OKCS Content Ratings (okcs_content_ratings). The ratings set up in KA authoring.
- OKCS Content Ratings Details (okcs_content_rating_details). The ratings given to articles.
- OKCS Subscriptions (okcs_subscriptions)