Oracle Engagement Cloud
Using Knowledge

Release 13 (update 18C)
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Preface

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

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

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

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

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 help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Implementing Knowledge in Engagement Cloud

Implementing Knowledge: Overview

You can implement Knowledge for use with Service and HR Help Desk. Knowledge enables administrators and authors to create and manage the knowledge base, which agents can then use to help resolve service requests. General users can use My Knowledge as a central location from which to locate and view knowledge.

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

To implement Knowledge, follow these steps:

- Enable the knowledge management functional area.
- Enable knowledge management features in service requests.
- Configure knowledge management capabilities for service requests and the My Knowledge page.
- Schedule the processes that synchronize categories and products with Service and HCM, and update search with changes to knowledge base content.
- Set up knowledge users so that they have access to the appropriate knowledge functions.

Note: After you complete the implementation, refer to the Administering Knowledge section to know more about important administration tasks.

Related Topics

- Administering Knowledge: Overview

Enabling Knowledge Features

Implementing Knowledge for Multiple Product Services: Explained

If you implement Knowledge in both Service and HR Help Desk, we strongly recommend that you segregate articles so that they are not shared between the two applications. The capability to share articles between applications may be removed in future releases. To ensure that articles are not shared between applications, authors need to select only one department when creating articles. Authors can select either the Service or HCM department for an article in the Add Details step of the article creation process.
Enabling the Knowledge Management Functional Area: Explained

You enable Knowledge using the opt-in process within Functional Setup Manager. You must have the Application Implementation Consultant role to enable this functional area. When the opt-in process is complete, knowledge managers will have access to the Knowledge Management configuration options.

**Note:** If you implemented knowledge in a previous release, Oracle recommends that you review this process to ensure that all knowledge features are enabled in FSM, so that your application is properly configured to access all knowledge features in this release and in subsequent releases.

To enable Knowledge, follow these steps:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Click Change feature Opt in.
4. Select the Enable option for the Knowledge Management functional area.

Enabling Knowledge in Service Requests: Procedure

You must enable knowledge so that agents can use recommended answers and search for additional knowledge from within service requests. You must have the Sales Administrator or Service Administrator role to enable this feature. To enable knowledge in service requests, follow these steps:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Service Request functional area.
4. Click Manage Service Request Knowledge Profile Options.
5. Select Yes as the Profile Value for the SVC_ENABLE_KNOWLEDGE_IN_SR profile.

Configuring Knowledge in Service Requests: Procedure

You can configure knowledge management in service requests by enabling or disabling knowledge management profile options that control various features, such as the ability to filter search results by category and product. You must have the Knowledge Manager role to enable or disable these features. For most new implementations, these profiles are set to Yes by default, meaning that the features are enabled.

To manage knowledge in service requests:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Knowledge Management functional area.
4. Select Manage Knowledge Panel Profile Options.
5. Select any of the following profile options to enable or disable specific features:
   - To enable the filtering of knowledge panel search results and recommended answers by category, select the CSO_ENABLE_CATEGORY_FILTER option, and set the value to Yes.
   - To enable agents to maintain a list of their favorite articles in the knowledge panel, select the CSO_ENABLE_KNOWLEDGE_FAVORITING option, and set the value to Yes.
To enable agents to link articles to service requests, select the CSO_ENABLE_KNOWLEDGE_LINKING option, and set the value to Yes.

To enable agents to filter search results by locale, select the CSO_ENABLE_LOCALE_FILTER option, and set the value to Yes.

To enable the filtering of knowledge panel search results and recommended answers by category, select the CSO_ENABLE_PRODUCT_FILTER option, and set the value to Yes.

To enable the application to display article excerpts in addition to titles in search results and recommended answers, select the CSO_SHOW_ARTICLE_SNIPPET option, and set the value to Yes.

Configuring My Knowledge Features: Procedure

You can configure knowledge in the My Knowledge page by enabling or disabling knowledge management profile options that control the My Knowledge menu item and the age limit for recent articles. You must have the Knowledge Manager role to enable or disable these features. For most new implementations, these profiles are set to Yes by default, meaning that the features are enabled.

To manage knowledge in the My Knowledge page:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Knowledge Management functional area.
4. Select Manage My Knowledge Profile Options.
5. Select any of the following profile options to enable or disable specific features:

   - To enable the My Knowledge menu for Help Desk, select the CSO_ENABLE_HCM_KMHOME option, and set the value to Yes.
   - To enable the My Knowledge menu for Service, select the CSO_ENABLE_SVC_KMHOME option, and set the value to Yes.
   - To set the upper age limit in days for recent articles, select the CSO_RECENTLY_UPDATED_TIME_PERIOD option, and specify the desired value in days. The default value is 30, so that articles aged more than 30 days will not display as recent articles.

Scheduling Knowledge Processes: Procedure

You must schedule the following processes for Knowledge:

- Knowledge Content Batch Process: This job updates Knowledge categories and products to reflect recent changes to Service and HCM products and categories. Schedule the Knowledge Content Batch Process job to run only once per day. Running this job more frequently is not recommended.

- Knowledge Search Batch Process: This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes.

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

To schedule Knowledge processes, do the following:

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

**Note:** Ensure the job has only one schedule.

**Related Topics**
- Submitting Scheduled Processes and Process Sets: Procedure

### Implementing Locales

#### Preferred Knowledge Locales for Users: Explained

Knowledge supports multiple locales, and an article can exist in a single locale, or be translated into multiple locales. For example, an article might be available in these locales: English United States (en-US), English Canada (en-CA), and French Canada (fr-CA).

Users can set a preferred knowledge locale, so that when they use knowledge in a service request or use My Knowledge, the application matches the locale of the search results to the their preferred knowledge locale. Users can set and change their knowledge locale preference at any time.

If a user has not set a preferred knowledge locale, the application will use the language and territory settings, which can lead to lower quality search results in some cases. For example, if the user’s preferred language is English and their territory is Canada, then the application will display search results in the locale en-CA (English, Canada). If there are fewer matching articles in the en-CA locale, the application will return fewer relevant articles.

Oracle recommends that all knowledge users set their preference to the knowledge locale that they will use most frequently.

#### Configuring the Default Locale: Procedure

You can change the default knowledge base locale from English-United States to any other active locale that meets your organization’s needs. The application uses the default locale to serve content when the users’ preferred language is unknown, or when content in the users’ preferred language is unavailable. All knowledge articles and objects must exist in the default locale, because the application must be able to display default locale objects if they are not available in users’ requested locale. For example, if an article in one locale has not been translated in the user’s current locale, the application will display the article in the default locale.

The default is initially set to English-United States. You must ensure that all articles and objects are available in the default locale. If you change the default locale from English-United States to another locale, you can also disable the English-United States locale if your organization does not need it.
Note: The application no longer automatically assigns the application’s default locale to authoring users.

To configure the default locale, follow these steps:

1. Click **Setup and Maintenance** in the springboard menu.
2. Select the **Service** offering.
3. Select the **Knowledge Management** functional area.
4. Select the **Manage Knowledge Locales** task.
5. Select any active locale in the Default Locale list.

### Configuring Knowledge in Multiple Locales: Explained

You can configure Knowledge to support multiple locales, and you can create and manage content in any of the available locales. The following table lists the available locales:

<table>
<thead>
<tr>
<th>Language</th>
<th>Territories</th>
<th>Locales</th>
<th>Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabic</td>
<td>Egypt, Saudi Arabia, UAE</td>
<td>ar-EG, ar-SA, ar-AE</td>
<td>Arabic - Egypt</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Arabic - Saudi Arabia</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Arabic - United Arab Emirates</td>
</tr>
<tr>
<td>Chinese (Simplified)</td>
<td>China</td>
<td>zh-CN</td>
<td>Chinese, Simplified - China</td>
</tr>
<tr>
<td>Chinese (Traditional)</td>
<td>Taiwan</td>
<td>zh-TW</td>
<td>Chinese, Traditional - Taiwan</td>
</tr>
<tr>
<td>Czech</td>
<td>Czech Republic</td>
<td>cs-CZ</td>
<td>Czech - Czech Republic</td>
</tr>
<tr>
<td>Danish</td>
<td>Denmark</td>
<td>da-DK</td>
<td>Danish - Denmark</td>
</tr>
<tr>
<td>Dutch</td>
<td>Belgium, The Netherlands</td>
<td>nl-BE, nl-NL</td>
<td>Dutch - Belgium</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Dutch - Netherlands</td>
</tr>
<tr>
<td>English</td>
<td>Australia, Canada, Ireland, New Zealand, UK, USA</td>
<td>en-AU, en-CA, en-IE, en-NZ, en-GB, en-US</td>
<td>English - Australia</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>English - Canada</td>
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<td></td>
<td></td>
<td></td>
<td>English - Ireland</td>
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<td>English - New Zealand</td>
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<td></td>
<td></td>
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<td>English - United Kingdom</td>
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<td></td>
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<td>English - United States</td>
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<tr>
<td>Finnish</td>
<td>Finland</td>
<td>fi-FI</td>
<td>Finnish - Finland</td>
</tr>
<tr>
<td>French (Canadian)</td>
<td>Canada</td>
<td>fr-CA</td>
<td>French - Canada</td>
</tr>
<tr>
<td>Language</td>
<td>Territories</td>
<td>Locales</td>
<td>Display Name</td>
</tr>
<tr>
<td>----------------------</td>
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<td>----------------------</td>
</tr>
<tr>
<td>French (European)</td>
<td>Belgium, France, Switzerland</td>
<td>fr-BE, fr-FR, fr-CH</td>
<td>French - Belgium</td>
</tr>
<tr>
<td></td>
<td></td>
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<td>French - France</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>French - Switzerland</td>
</tr>
<tr>
<td>German</td>
<td>Austria, Germany, Switzerland</td>
<td>de-AT, de-DE, de-CH</td>
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<td>German - Germany</td>
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<tr>
<td>Hebrew</td>
<td>Israel</td>
<td>he-IL</td>
<td>Hebrew - Israel</td>
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<tr>
<td>Hungarian</td>
<td>Hungary</td>
<td>hu-HU</td>
<td>Hungarian - Hungary</td>
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<tr>
<td>Italian</td>
<td>Italy, Switzerland</td>
<td>it-IT, it-CH</td>
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<td>ko-KR</td>
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<td>no-NO</td>
<td>Norwegian - Norway</td>
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<td>Poland</td>
<td>pl-PL</td>
<td>Polish - Poland</td>
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<td>Portuguese, Brazilian</td>
<td>Brazil, Portugal</td>
<td>pt-BR, pt-PT</td>
<td>Portuguese - Brazil</td>
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<td>Portuguese - Portugal</td>
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<td>Romania</td>
<td>ro-RO</td>
<td>Romanian - Romania</td>
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<td>Russia</td>
<td>ru-RU</td>
<td>Russian - Russia</td>
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<td>Spanish</td>
<td>Mexico, Spain</td>
<td>es-MX, es-ES</td>
<td>Spanish - Mexico</td>
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<td>Spanish - Spain</td>
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<tr>
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<td>Sweden</td>
<td>sv-SV</td>
<td>Swedish - Sweden</td>
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<tr>
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<td>Thailand</td>
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</tr>
<tr>
<td>Turkish</td>
<td>Turkey</td>
<td>tr-TR</td>
<td>Turkish - Turkey</td>
</tr>
</tbody>
</table>
Implementing Users

Setting Up Knowledge Users

Administrators can give any user that is defined in the application access to Knowledge features and capabilities. You can create new users and set them up as knowledge users, or set up existing users as knowledge users. You set up knowledge users by granting them appropriate roles. For authoring users, you must also assign locales and access to one or more types of articles.

Different types of knowledge users in your organization have different requirements for roles, locales, and content type access. This section describes the most common types of users in Service and HR Help Desk applications, the roles and other attributes that grant appropriate capabilities to each type of user, and the specific procedures required to set up each type of user.

Types of Knowledge Roles

Different types of knowledge users have different requirements for accessing and using knowledge. Some individual users belong to more than one type. For example, customer service representatives are often also authors who contribute articles to the knowledge base. You can assign individual users the roles associated with more than one type of user. When you set up knowledge users, either by creating new users or granting knowledge capabilities to existing users, consult these descriptions to help you grant the appropriate roles, locales, and authoring access to content types:

- Self-service users need to access knowledge from Digital Customer Service and other user-defined portals or pages that are configured to provide knowledge access.
- Customer service representatives (also referred to as agents) and customer service managers need to access knowledge within service requests (SRs)
- HR Help Desk agents and managers need to access knowledge within HCM.
- Service authors need to access the appropriate knowledge authoring environment to create and manage service articles.
- HCM authors need to access the appropriate knowledge authoring environment to create and manage HCM articles.
- Knowledge managers and administrators need to manage and administer the knowledge base.

Service Knowledge Roles

Use these roles to assign Knowledge capabilities to Service knowledge-base users.

The Service roles include:

- Customer Service Representative
- Customer Service Manager
- Knowledge Author - Service
- Customer Self-service User
The Customer Service Representative Role
Customer service representatives use knowledge to resolve customer issues. They have these capabilities:

- Access My Knowledge
- Access knowledge within SRs
- Access to public and internal articles
- Access to only the Service knowledge base

The Customer Service Manager Role
Customer service managers supervise customer service representatives and use knowledge to help manage their team's performance. They have these capabilities:

- Access My Knowledge
- Access knowledge within SRs
- Access to public and internal articles
- Access to only the Service knowledge base

The Knowledge Author - Service Role
These Knowledge authors can access only Service articles and contribute only to the Service knowledge base life cycle. They have these capabilities:

- Access to Knowledge authoring
- Access to public and internal articles
- Access to only the Service knowledge base

The Customer Self Service User Role
Self-service users can access knowledge using Digital Customer Service and user-defined pages and portals. They have no access to knowledge functional areas, and they can access only public articles. They cannot access internal articles.

HCM Application Roles
HR Help Desk agents creating and manage HR help desk tickets on behalf of employees. They have these capabilities:

- Access to these functional areas:
  - My Knowledge
  - Knowledge in HCM service requests
  - Knowledge authoring

- Access to public and internal articles
- Access to only the HCM application
The HR Help Desk Manager Role

HR Help Desk managers manage HR Help Desk agents or are responsible for reviewing and analyzing HR Help Desk metrics. They have these capabilities:

- Access to these functional areas:
  - My Knowledge
  - Knowledge in HCM service requests
  - Knowledge authoring

- Access to public and internal articles
- Access to only the HCM application

The HR Help Desk Administrator Role

HR Help Desk administrators have these capabilities:

- Access to Knowledge Home
- Access to Knowledge in HCM Service Requests
- Access to public and internal articles
- Access to only the HCM application

The Knowledge Author - HCM Role

These Knowledge authors can access only HCM articles and contribute only to the HCM knowledge base life cycle. They have these capabilities:

- Access to Knowledge authoring
- Access to public and internal articles
- Access to only the HCM application

General Knowledge Roles

Use general knowledge roles to assign Knowledge Manager capabilities to Service and HCM application users. The general Knowledge roles include:

- Knowledge Manager
- Knowledge Analyst

Note: The Knowledge Analyst role is a legacy role that is not recommended for use in new implementations.
The Knowledge Manager Role

Knowledge Managers administer and manage the knowledge base and other functional areas to ensure that users can access relevant knowledge and that authorized contributors can create and maintain knowledge base content. They have these capabilities:

- Access to these functional areas:
  - My Knowledge
  - Knowledge authoring
  - Knowledge analytics
  - Knowledge setup and maintenance tasks in Functional Setup Manager
  - Knowledge user management
- Access to public and internal articles
- Access to both HCM and Service knowledge base

The Knowledge Analyst Role

This role is a legacy role that enables a user to create and manage knowledge in both Service and HCM applications. Knowledge Analyst role has these capabilities:

- Access to My Knowledge
- Access to Authoring
- Access to Knowledge analytics
- Access to public and internal articles
- Access to both HCM and Service knowledge bases

Setting up Self-Service Users

You can set up self-service users by assigning the Customer Self Service role. Self-service users can access knowledge using Digital Customer Service and other user-defined, end-user facing pages and portals that provide access to the knowledge base. They have no access to knowledge functional areas, and they can access only public articles. They cannot access internal articles.

Setting up Customer Service Representatives and Managers

You can set up customer service representatives by assigning the Customer Service Representative role. You can set up customer service managers by assigning the Customer Service Manager role.

Customer service representatives can access My Knowledge, use knowledge within SRs, and have access to public and internal articles. They can access only the Service knowledge base. Customer service managers can access My Knowledge, use knowledge within SRs, and have access to public and internal articles. They can access only the Service knowledge base.
Setting up HR Help Desk Representatives and Managers

You can set up HR Help Desk representatives by assigning the HR Help Desk Agent role. You can set up HR Help Desk managers by assigning the HR Help Desk Manager role.

HR Help Desk representatives can access My Knowledge, use knowledge within HCM service requests, use knowledge authoring, and have access to internal articles (all HCM articles are internal). They can access only the HCM knowledge base.

HR Help Desk managers can access My Knowledge, use knowledge within HCM service requests, use knowledge authoring, and have access to internal articles (all HCM articles are internal). They can access only the HCM knowledge base.

Setting up Service or HCM Authors

You set up Service and HCM authors by assigning roles, authoring locales, and content types. You can set up Service authors by assigning the Knowledge Author - Service role. You can set up HCM authors by assigning the Knowledge Author - HCM role.

HCM authors can access only the HCM knowledge base, and can contribute only to the HCM knowledge base life cycle. They can access HCM authoring and HCM articles (all HCM articles are internal).

Service authors can access only the Service knowledge base, and can contribute only to the Service knowledge base life cycle. They can access Service authoring and public and internal articles.

You must grant locale privileges to all authors, and content type privileges to the authoring roles. Authors can create and manage articles only in the locales that you assign to them, and can access only the content types that are assigned to their roles.

Related Topics

- Managing Locales for Authors: Procedure
- Assigning Content Type Privileges to Roles: Procedure

Setting up Knowledge Managers

You can set up Knowledge managers by assigning the Knowledge Manager role. Knowledge managers can access My Knowledge, authoring, analytics, setup and maintenance tasks, and user management. They can access public and internal articles, in both Service and HCM knowledge bases.

Granting Roles to Users: Procedure

You can provide users with access to create or manage content by granting them one of the following roles:

To grant Knowledge roles to users:

> Note: You must have the Knowledge Manager role to grant knowledge roles to users.

1. Sign in to the application, and from the navigator, select **Security Console**.
2. Click the Users icon from the menu.
3. Search for the user by entering three or more characters of the user name in the search box.
4. Select the user from the search results and click the user login link.
5. Click Edit in the user account details page.
6. Click **Add Role** in the Edit User Account page.
7. In the Add Role Membership dialog box, search for the role by entering three or more characters in the search box.
8. Select the role from the search results and click **Add Role Membership**.
9. Click OK on the confirmation dialog box and click Done in the Add Role Membership dialog box.

The roles you have granted are now listed on the Edit User Account page.
2 Using Knowledge with Service Requests

Using Knowledge with Service Requests: Explained

You can use Knowledge to help solve service request (SR) issues. While creating or working in an SR, you can quickly insert relevant knowledge base articles into SR communications and send the information to the customers.

Accessing Knowledge in an SR

You can access knowledge while creating an SR to help resolve issues quickly and efficiently. While creating an SR, you can search for relevant knowledge base articles and add them to your favorite articles.

You can access knowledge in an SR to help resolve issues quickly and efficiently. You can view recommended articles based on the SR title, search for additional relevant knowledge base articles, and add articles to your favorites.

To access knowledge, open Knowledge from within the SR. The Recommended Answers tab lists relevant articles based on title of the SR and any additional product and category information. You can view articles, search the knowledge base for more articles, insert articles into the SR, and manage your favorite articles list.

Searching for Articles in an SR

If you don't find the article you want in the recommended articles section, you can search the knowledge base.

You can search the knowledge base to find additional articles based on new search terms, categories and products, and locales. You can search for articles in any locale that is supported by your application. Authors can create articles in any supported locale, and articles can also be translated into multiple locales.

When you search in a service request, the application matches the locale of the search results to the your preferred knowledge locale. You can set or change your knowledge locale preference at any time.

If you have not set a preferred knowledge locale, the application will use your language and territory settings, which can lead to lower quality search results in some cases. For example, if your preferred language is English and your preferred territory is Canada, then the application will display search results in the locale en-CA (English, Canada). If there are fewer matching articles in the en-CA locale, the application will return fewer relevant articles.

To search for additional articles:

1. Expand the search area.
2. Enter a word or phrase.
3. Choose relevant categories and products if you want to restrict your search results.
4. Select a locale to see results in a language other than your preferred knowledge locale.

Adding Knowledge to SRs: Explained

You can insert Knowledge articles into SR messages as text to help resolve issues efficiently. You can add article contents to an SR directly from the knowledge tab, from the article details window, or manually using the insert knowledge option in the compose message pane within an SR.
Adding Articles to SRs
You can add articles to an SR from the Knowledge pane and from the Article Details window. You can add multiple articles to a single SR.

To add knowledge as text:

1. Open an SR in edit mode, then open Knowledge.
2. Locate the article that you want to add to the SR.
3. Click **Insert knowledge** article as text in a message item in the knowledge pane or on the article details window.
   - The text of the article appears in the **Compose: Response** pane in the **Messages** tab, and the article is linked to the SR.
4. Select the appropriate channel type and add a personalized message if wanted.
5. Click **Send**, or click **Save to Draft**.

Manually Adding Articles to SRs
You can manually insert linked articles into an SR to send the article contents to the recipients. To send an article that is not yet linked to the SR, you must first link the article to the SR and save the SR.

To manually insert an article:

1. Open an SR in edit mode and click the **Messages** tab.
2. Select the message type that you want to send from the **Compose** drop down list.
   - The Compose: message type pane opens.
3. Click **Insert Knowledge**.
   - The Insert Knowledge window opens and the articles that are linked to the SR appear.
4. Click the **Insert as Text** icon and then click **Done**.
   - The article is added as text to the SR message.
5. Edit the article text if needed.
6. Click **Send**, or click **Save to Draft**.

Linking Articles to SRs
You can link an article to an SR to use its contents to help resolve the issue. Linking articles to SRs improves the quality of the knowledge base by helping agents quickly access knowledge to resolve similar issues in the future.

To link an article to SR:

1. Open Knowledge in the SR.
2. Locate the article in the recommended, favorites, or search results list.
3. Click the link icon that corresponds to the article you want to link.
4. Save the SR to complete the link. The link will not be active until you save the SR.

Viewing Linked Articles
To view articles that are linked to an SR:

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

2. Click the **Delete** icon to remove a linked article from an SR.

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**Adding Favorite Articles: Explained**

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

**Rating an Article: Procedure**

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

To rate an article:

1. Open an article.

   The article details window displays the contents of the article.

2. Click the star on the rating scale to indicate your rating.
3 Using My Knowledge

My Knowledge: Explained

My Knowledge is a centralized location that provides you with a view into relevant knowledge about products and services. My Knowledge is available to knowledge base users, including authors, service agents and help desk agents. You can use My Knowledge to locate articles and if configured, you can also see recently viewed articles and view and manage favorites.

You can access My Knowledge using these paths:

- If you are using Service, select Service, then My Knowledge.
- If you are using HR Help Desk, select Help Desk, then My Knowledge.

Related Topics

- Adding Favorite Articles: Explained

Setting Your Preferred Knowledge Locale

You can choose the locale to use as your preferred knowledge locale. You can choose any locale that is active for your organization. By default, Knowledge displays content in the locale that corresponds to your language and territory preferences. You can set a different locale preference independently of your language and territory preferences.

For example, if your language preference is French, and your territory preference is Canada, Knowledge displays content in the locale French-Canada by default. If you set your preferred knowledge locale to a different locale, for example English-Canada, Knowledge displays content in the English Canada locale instead.

Note: Administrators no longer must set users’ default authoring locale on Knowledge Users page, and the application does not automatically assign a default locale to users.

You choose your preferred locale from your user preferences. To set your preferred locale, perform these steps:

1. Open Settings and Actions.
2. Select Set Preferences.
3. Select Preferred Knowledge Locale and select a locale from the menu.

Searching for Articles in My Knowledge: Procedure

You can use My Knowledge to search for knowledge base articles. You can search for articles in any locale that is supported by your application. Authors can create articles in any supported locale, and articles can also be translated into multiple locales.

When you search in My Knowledge, the application matches the locale of the search results to the your preferred knowledge locale. You can set or change the knowledge locale preference at any time.
If you have not set a preferred knowledge locale, the application will use your language and territory settings, which can lead to lower quality search results in some cases. For example, if your preferred language is English and your preferred territory is Canada, then the application will display search results in the locale en-CA (English, Canada). If there are fewer matching articles in the en-CA locale, the application will return fewer relevant articles.

To search for an article:

1. Enter the term in the **Search** field.
2. Click the **Show Advanced Search** icon select a locale other than your preferred locale, if wanted.
3. Click the **Search** icon.

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

Knowledge Authoring: Explained

Authorized users can use Knowledge Authoring to create and manage knowledge articles. You can create and publish articles, periodically update them, translate them into supported locales, and unpublish them when they are no longer needed. Agents can use knowledge base articles to easily find solutions to customer issues and link articles to customer incidents. To access Knowledge authoring, select Authoring in the Navigator panel.

Setting an Authoring Locale: Procedure

You can set an authoring locale as follows:

Knowledge Articles: Explained

Articles are the basic units of the knowledge base. You can create and manage articles in the knowledge base, periodically update them, translate them into supported locales, and unpublish them when they are no longer needed.

About Articles

You can create the following types of articles:

- FAQ
- Solutions
- Content types that are created specifically for your organization

Articles and their translated versions share the article ID. You can select an article to view details about its publishing status, relevant products and categories, and other information.

Locating Articles

You can search for an article by its ID or by doing an advanced search using multiple criteria. You can use the filter to restrict the list to specific criteria. To filter the list,

1. Select a menu to filter by:
   - All Articles
   - My Articles
   - Articles Last Modified by Me
2. Select the value that you want to apply to the list.
To sort the list, select a column and click the up or down arrows. You can sort by Article, Title, Last Updated. You can also add the Live Version column which indicates the current version of the article.

Viewing Article Properties
When you open an article, it displays the article ID, current version, and the date it was last modified. You can also use the slide bar on the page to view the following additional information about the article: live version, date of creation, owner, departments, products, categories, and user groups.

Creating Articles: Procedure
You create an article by selecting the content type, adding required and optional content to the fields, and adding the department, products, categories, and visibility for the article.

To create an article:
1. Click the Create Article tab on the Authoring page.
2. Select the content type.
3. Enter the required and optional content and information for the article.
4. Add the department, products, categories, and visibility for the article.

Choosing the Article Type
You can choose the type of article that you want to create by its content type. The content type is the template for the article you create. Each content type contains defined required and optional fields that you use to write the article.

You can select one of the following content types for an article:
- FAQ
- Solution
- HCM-FAQ
- HCM-Solution
- Content types that are created specifically for your organization, if they are available.

Choosing a Department for an Article
The department that you choose identifies whether an article is part of a Service or HCM knowledge base. Choose only one department for an article, depending on whether your knowledge base is part of a Service application or an HCM Help Desk application. If you have knowledge bases for both applications, choose only one department so that articles are not shared between applications. Segregate articles so that they are not shared between the applications.

Adding Categories to Articles
Categories enable you to organize articles by any characteristic or business requirement, such as billing or warranty information, so that you can manage and present related articles consistently. You can add categories to articles to make the article more easily accessible to users who are interested in specific types, or categories, of information. You can add multiple categories to an article. Users can filter search results and browse lists of articles by category.
If there are more than 100 categories, use the Search field to locate categories of interest.

Adding Products to Articles
You can add products to articles to make them more easily accessible to users who are interested in specific information about specific products. You can add multiple products to an article. Users can filter search results and browse lists of articles by product.

To add a product to an article:
1. Select the product from Available Products.
2. Click the right arrows to move the product to Selected Products.

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

Adding a User Group to an Article
You can add the internal user group to restrict an article’s availability. Adding the internal user group to an article limits the article’s visibility to users who have roles that include the Internal user group, such as Customer Service Representative and Customer Service Manager. Articles that have no user group assigned are available to all users, including those with roles that include the Internal user group.

To make an article available to only to internal users, assign the internal user group. To make an article available to all users, including internal users, do not assign the internal user group.

Creating an FAQ: Procedure
Frequently asked questions (FAQs and HCM FAQs) include a summary statement, a question, and an answer. You can use the text editor to format the information in each section. You can also add the department, products, categories, and user groups that are relevant to the article’s subject matter.

To create an FAQ:
1. Select FAQ on the Select Content Type page.
2. On the Create FAQ page, select a locale and enter the following information for the FAQ:
   a. Enter a summary statement or title.
   b. Enter the question that the FAQ addresses.
   c. Enter the answer to the question.
3. Click Next, and add the department, products, categories, and visibility as needed.
4. Click Create to complete the creation process.

Creating a Solution: Procedure
A solution (Solution or HCM Solution) provides detailed information about a specific issue. A solution consists of a summary statement, an issue, a resolution, and information about the environment and the cause. You can use the text editor to format
the information in each section. You can also add the department, products, categories, and user groups that are relevant to the article’s subject matter.

To create a solution:

1. Select Solution on the Select Content Type page.
2. On the Create Solution page, select a locale and enter the following information for the solution:
   a. Enter a summary statement or title.
   b. Describe the issue.
   c. Provide information about the environment in which the issue occurs.
   d. Provide information about the cause of the issue.
3. Click Next, and add the department, products, categories, and visibility as needed.
4. Click Create to complete the creation process.

Editing Articles: Procedure

You can select an article and update the content and metadata fields as needed.

To edit an article:

1. Select the article from the list.
2. Edit the article content and properties, and select Save or Save and Close as needed.

You can use the What did you change? dialog box to record the changes you made to the article.

Checking Out and Checking In Articles: Explained

You can check out and lock articles while you edit them to prevent other authors from editing them at the same time. An article can be checked out only to one user at a time, and during the check out period, only that user can update, publish, or perform any other operation. Users who have the privilege to clear check outs can check in articles that are checked out by other authors.

Note: Checking out articles is optional. If you edit an article without checking it out, the application locks the article so that other authors cannot accidentally overwrite your changes or create conflicts.

To check out an article, open the article, and from the Actions menu, select Check Out. To check it back in, select Check In from the Actions menu.

Commenting on an Article: Explained

You can comment on an article to keep track of your edits. Comments appear in the Comments column in the article history. To track changes to an article, follow these steps:

1. Open the article, and from the Actions menu, select Edit.
2. On the edit page, click What did you change? and enter your comments.
Changing an Article's Owner: Procedure

You can change the owner of an article to be any author. To change an article’s owner, follow these steps:

1. Open the article and open the slider by clicking the Restore Pane arrow.
2. Select change owner.
3. Search for the new owner and click Change Owner.

Article Versions: Explained

The application assigns a version number to each article. When you create and save an article, it is assigned an initial version of 1.0. Each subsequent update to an article results in a major version increment, for example, 1.0 to 2.0. When you translate an article, the initial translated version is designated as version 1.0, regardless of the version number of the original article.

Comparing Versions

You can compare two versions of an article with one other.

To compare the current live version to the last version, open the article and select Compare from the actions menu.

To compare any two versions, follow these steps:

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

Publishing and Unpublishing Articles

You can publish and unpublish articles. Publishing articles makes them available to users. Unpublishing articles removes them from search and browse lists, so that they are no longer available to users. Unpublished articles and their histories are maintained in the knowledge base.

You can publish articles when you save them. You can also publish a saved draft from the article list page. To publish an article, select Publish from the Actions menu. To unpublish, select Unpublish from the Actions menu.

Translating Articles: Procedure

You can create a translation of an article in any language that is supported in the knowledge base, and that you have privileges to work in. You translate an article by selecting the new article’s locale, supplying the content for the new article, and modifying the new article’s properties as needed. The application creates the translated article as a new article, and designates it as version 1.0. The knowledge base maintains a relationship between the translated article and the original article.

To translate an article:

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

3. Click Next and modify the article properties as desired. Optionally, you can copy the properties from the source article.

4. Click Create to complete the translation.
5 Administering Knowledge

Administering Knowledge: Overview

You can administer the knowledge application, including the locales in which knowledge is available, the types of articles that the knowledge base contains, and other important functions. You can perform the following tasks to administer the knowledge application:

- Manage locales for the application by activating and deactivating them.
- Specify the locales that authors have access to.
- Define new content types to add new types of articles to the knowledge base.
- Manage application users.
- Configure the My Knowledge page for your organization.
- Manage the jobs that update search as the knowledge base changes.

Managing Knowledge Locales: Overview

Locales designate a language and a specific region in which a variant of that language is used. Locales help you to differentiate knowledge content by language and country or region. Important locale-specific differences include regulations, procedures, addresses, currencies, date formats, and country- or region-specific terms.

Knowledge is available for use in all locales supported by the application. You can use Knowledge with multiple locales by activating the locales that you want to use. Knowledge is configured to have a default locale. You can change the default locale to one that best meets your organization's needs.

Activating and Deactivating Knowledge Locales: Procedure

You can view, activate, and deactivate locales from the Manage Locales page. You can search for specific locales, and list either all locales, active locales, or inactive locales.

Active locales are available for authors to use, and authors can create, translate and publish articles from that locale. Activating a locale makes it available to users, while deactivating a locale makes it unavailable. When you deactivate a locale, users cannot add or update articles, or access them by searching or browsing. Articles in inactive locales remain in the database. To permanently delete the contents of a locale, delete the objects in the locale before deactivating it. You can reactivate a locale to make its contents available to users again.

To activate or deactivate a locale:

1. Go to Setup and Maintenance and select Service from the Setup drop-down list.
2. Select Knowledge Management from the functional areas, and select the Manage Knowledge Locales task.
3. Select the check box of the locale that you want to activate or deactivate.
Managing Locales for Authors: Procedure

You must assign all locales in which authors are authorized to create and edit articles by adding or removing locales. Users can create and manage content only in locales that are assigned to them.

The Knowledge Users page displays the available and assigned locales for a selected author. To add or delete locales for authors:

1. Select Knowledge Users in the Navigator.
2. Locate the authors you want to update. You can search by using partial or complete user names or IDs.
3. Select the authoring locales that you want to add or remove and click the arrow icons to move the locales to or from the assigned column. You can select multiple locales in a single operation, or select all of the locales by using the double arrow.

Note: The list of users is limited to three hundred entries. Use search to locate users that are not listed due to this limitation.

What are content types?

Content types define the various types of articles in your knowledge base. A content type definition serves as an authoring template for articles that serve a specific purpose. For example, the application has prebuilt content types for solutions and FAQs. You can define any number of content types and vary the elements that they contain, including the following:

- Content elements, including the title, and the text fields that make up the body of the article.
- Locale-specific article and field-level titles and descriptions.
- Products and categories that are relevant to the content type.
- Visibility to audiences at the article and field levels.

Defining Content Types: Procedure

A Knowledge Manager can define content types. You create the content type by defining the content type, defining the schema for the content type, and defining the content schema details.

To define a content type, do the following:

1. Select Setup and Maintenance from the navigator, and from the Setup menu, select the Service offering.
2. Select the Knowledge Management functional area and select Manage Knowledge Content Types.
3. Click the + symbol to begin creating the content type.

Defining the Content Type

You define the content type by supplying basic information, including a name, an optional description, a prefix ID, and names and descriptions for additional knowledge base locales.
The application automatically assigns a reference key based on the content type name. If you change the content type name after you initially enter it, you can edit the reference key to match the edited name prior to saving the content type data. The description is visible as placeholder text that authors see when creating articles. The prefix ID forms the first part of the article ID that is automatically created for each article in the knowledge base. The prefix helps to identify articles belonging to a specific content type. For example, you might use the prefix NA for a News Article content type. You can use numerals and letters in your document ID prefix.

To define the content type, do the following:

1. Enter a name for the content type.
2. Enter a prefix for the ID number that the application will automatically assign to each article.
3. Enter an optional description.
4. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.

Defining the Content Schema

The content schema describes the structure of the articles in the content type. You define the schema by defining the individual elements that make up an article. For example, you might define the elements of a news article content type to include the elements title, summary, body, and related information.

You can restrict fields within articles to internal users. For example, you might need to define a product support document that includes information that only agents should have access to. Internal users are those with roles that include the Internal user group, such as Customer Service Representative and Customer Service Manager. If you do not select a user group, then the field will be visible to all users.

You can select the type of content that the field will accept. Use the field type field to select text or full rich text. Full rich text fields have a full featured text editor that supports complex formatting and markup, as well as images. Text areas support simple text entry. You can also specify whether authors must enter content in a field, or whether they can leave the field empty.

You define the content schema by defining the title field, then defining the additional fields that you need.

To define the content schema title field, do the following:

1. Enter a title or accept the default. The title field is required for all content types.
2. Enter an optional description for the title field.
3. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.

To define the additional fields, do the following for each element or field that your content type requires:

1. Click the + sign to add additional fields.
2. Enter a name and description for each field.
3. Click the locale icon and use the Edit Locales dialog to enter translated names and descriptions for the additional locales.
4. Click the visibility icon to optionally restrict this field to internal users only.
5. Select the field type to define the text requirements for each field.
6. Click the check box to specify that authors must enter content in this field.

Defining the Content Schema Details

Content schema details define the products, categories, and audiences that the content type is relevant to. You can search for products, categories, or page through. You can select multiple items from the list, or click the double arrow to move all
of the items from one list to the other. Authors can select the relevant products or categories for articles by choosing from among those that you select in the content schema details.

To define the content schema details, do the following:

1. Select the products that you want to associate with the content type.
2. Select the categories that you want to associate with the content type.
3. Select the internal user group only if you want to restrict this content type to internal users.

Assigning Content Type Privileges to Roles: Procedure

Content type privileges indicate the operations a user role can perform on each content type. Roles can have a different privileges for different content types. For example, you may want Knowledge Authors to be able to perform all operations on FAQs, but Customer Service Representatives to be able only to view them.

To assign content type privileges to roles, do the following:

1. Select Knowledge Users in the Navigator.
2. Click Roles to view the list of knowledge roles and content type privileges.
3. Select the role for which you want to assign content type privileges and select the corresponding content type check boxes.

Managing Knowledge Users: Explained

Authorized users can access the Users tab to list Knowledge users, review their roles and status, and set user content locales. You define Knowledge users during the application setup. User statuses can be active, inactive, locked, or imported.

You can view the following details for a user:

- Status
- User interface locale
- Security role

The security role governs the content and locales that a user can access, and the actions a user can perform. You can edit a user's content locales by selecting Edit User in the User Properties panel.

Granting Roles to Users: Procedure

You can provide users with access to create or manage content by granting them one of the following roles:

To grant Knowledge roles to users:

> **Note:** You must have the Knowledge Manager role to grant knowledge roles to users.

1. Sign in to the application, and from the navigator, select Security Console.
2. Click the Users icon from the menu.
3. Search for the user by entering three or more characters of the user name in the search box.
4. Select the user from the search results and click the user login link.
5. Click Edit in the user account details page.
6. Click Add Role in the Edit User Account page.
7. In the Add Role Membership dialog box, search for the role by entering three or more characters in the search box.
8. Select the role from the search results and click Add Role Membership.
9. Click OK on the confirmation dialog box and click Done in the Add Role Membership dialog box.

The roles you have granted are now listed on the Edit User Account page.

## Configuring the My Knowledge Page: Procedure

You can configure the My Knowledge page by adding Recently Updated and Favorites tabs. You configure My Knowledge using Application Composer to activate a sandbox, configure the page, and publish the sandbox. You may need to create a sandbox as part of this procedure.

> **Note:** You must have the knowledge manager role (with the FND_VIEW_ADMIN_LINK_PRIV privilege) to configure the My Knowledge page. You must be an application administrator (with the FND_ADMINISTER_SANDBOX_PRIV privilege) to publish a sandbox.

### Configuring at Site Level and Role Level

You should note the following before proceeding with configuring. Configuring done at the role level overrides the configuring done at the site level. The user roles determine the levels at which the configuration is visible.

The following table illustrates the roles and the levels at which the configurations are visible.

<table>
<thead>
<tr>
<th>User with Roles</th>
<th>Configuration Visibility</th>
</tr>
</thead>
</table>
| customer service representative | • Visible at site level and customer service representative level  
• Not visible at knowledge analyst level |
| knowledge analyst and knowledge manager | • Visible at site level and knowledge analyst level  
• Not visible at customer service representative level |
| customer service representative, customer service manager, knowledge analyst, and knowledge manager | Visible at all levels |

### Accessing or creating an Active Sandbox

You must access a sandbox to configure the My Knowledge page. You can access a currently active sandbox, activate an existing sandbox, or create and activate a new sandbox.

To access and activate a sandbox, open the Settings and Actions menu by clicking the user icon on the My Knowledge page, and select Manage Sandboxes. If no sandbox is active, select Activate Sandbox in the Sandbox Required dialog.

If no sandbox exists, create a sandbox and activate it by doing the following steps:

1. On the Manage Sandboxes page, open the Action menu and select New.
2. In the Create Sandbox dialog box, enter a sandbox name and click Save and Close.
3. Click OK on the confirmation dialog box.
4. Search for the new sandbox and make it the default.
5. Click Yes in the dialog box.

Adding Content to the Page

Add tabs to the My Knowledge home page as follows:

1. Open the Settings and Actions menu and select Edit Pages.
2. Select the Site layer and click OK.
3. Click Add Content to view the Add Content dialog.
4. Click Open if you want to add components such as an image, moveable box, and so on to the page.
5. Click +Add if you want to add favorite articles, knowledge search results, or recently updated articles to the page.

The selected content is added to the page.

Publishing the Sandbox

Publish the updated sandbox as follows:

Note: If you configure at the application level, all users see the changed content. If you configure at the role level, only users with that role see the changed content.

1. Open the Settings and Actions menu and select Manage Sandboxes.
2. Select the sandbox you created and click Publish.

The sandbox is published.

Adding Knowledge to an Application Page: Procedure

You can enable users to access Knowledge from HCM application pages by adding the Knowledge Result list. For example, adding knowledge to an HCM transaction page, such as Transfer, or to help pages can enable users to quickly resolve issues and increase satisfaction and productivity. Users will see knowledge content relevant to them and the page that they are using, and they can read recommended articles or search for additional information.

The Knowledge Result list is available as a shared resource in the common Resource Catalog. Knowledge search and article viewing functionality is available only for CRM and HCM pages. Follow these guidelines before adding Knowledge to CRM and HCM pages:

• Verify that you have the following privileges:
  o Sandbox Management (FND_VIEW_ADMIN_LINK_PRIV)
  o Sandbox publishing (FND_ADMINISTER_SANDBOX_PRIV)
  o Page Editing (FND_VIEW_ADMIN_LINK_PRIV)
  o View Knowledge widget (PER_ACCESS_KM_FROM_HCM)

• Understand the typical workflows for working with runtime application changes.

• Verify that the page can be modified by checking that either the general Edit Pages menu item or the Edit Pages item for the specific page is available in the Settings and Actions menu.
When you have verified the page and your privileges, you can add the knowledge component to the page by following this process:

- Activate a sandbox for your application.
- Use Page Composer to add the knowledge panel component.
- Configure properties to set the default tab, search terms, and locale.
- Publish the updated page.

Adding the Knowledge Component

To add the Knowledge component to the page, follow these steps:

1. Open the page you want to edit, and click **Edit Pages** in the Settings and Actions menu.
2. Follow the appropriate Edit Pages visibility instructions, then click **OK**.
   
   The page will display one or more Add Content buttons, or a ribbon with Add Content, Select, and Structure tabs.
3. Click the desired **Add Content** button, or click the **Structure** tab and the location where you want to add the Knowledge widget.
4. Click **Edit**, then click the "+" icon.
5. Click **Application Content**, then click the "+ Add" link for the Knowledge widget.

Configuring the Knowledge Component: Procedure

You configure the Knowledge component to display the desired content to users by setting these parameters:

- the default Knowledge tab to open on the page
- the default search parameters to populate the list of knowledge articles
- the default knowledge locale

If User-Friendly Parameter Setup is enabled, you can use the menu options to select the default tab, and the dialog to configure the search locales. If User Friendly Parameter Setup is not enabled, you must manually enter the data for the knowledge parameters.

To configure the component:

1. Hover over the component to display the **Edit** icon.
   
   If the ribbon displays, you may need to switch to the **Add Content** tab to display the **Edit** icon.
2. Select the **Parameters** tab in **Component Properties**.

Configuring the Default Knowledge Tab

You can specify which tab of the Knowledge component to open when users view the page that you add Knowledge to. The available tabs are as follows:

- **Recommended Articles** displays a list of search results based on the default search terms that you configure for the Knowledge component.
- **Search** displays a field for users to conduct their own search of the knowledge base.
- **Favorites** displays the user’s list of favorite articles.
If User Friendly Parameter Setup is enabled, you can select the desired knowledge tab to display on the page by default from the Default tab. If User Friendly Parameter Setup is not enabled, manually enter one of the following identifiers to specify the desired tab:

- SEARCH
- RECOMMEND
- FAVORITES

Configuring the Default Search Terms

The Recommended Articles tab displays a list of articles based on the default search terms that you configure. If User-Friendly Parameter Setup is enabled, you can use the menu and dialog to configure the search terms. If User Friendly Parameter Setup is not enabled, you must manually enter the locale and search terms in the following format:

```json
{"language_code-location_code":"search_term","language_code-location_code":"search_term",...}
```

Specify one entry for each active knowledge locale in your application. For example, if your application supports knowledge in English for the United States of America, French for users in France, and Spanish for users in Spain, and you want to display articles about vacation policy, enter the following:

```json
{"en_US":"vacation","fr_FR":"vacances","sp_SP":"vacaciones "},
```

To configure default search terms:

1. Click the magnifying glass icon for the Search Locales Map to display the list of supported locales (language and territories).
2. If User Friendly Parameter Setup is enabled, enter a search term for each active locale (language and territory) for the application. If User Friendly Parameter Setup is not enabled, manually enter the search term and locale data.

You can now publish the sandbox to make the edited page available to users.

Related Topics

- Page Composer Overview
- Setting Up Sandboxes: Procedure

Managing Search Content Processing Jobs: Explained

Knowledge Administrators can start content processing jobs, view status of currently running and completed jobs, and view log details of completed jobs.

The Content Processing page lists the jobs that are currently running or completed. For each listed job, the page displays the type of job, the start and end time, the total time that the job ran, and its completion status. You can refresh the page to update information on currently running jobs.

There are two types of content processing jobs:

- Incremental jobs process only documents and dictionary concept changes that have been updated since the completion of the previous job. Incremental jobs should run every 15 minutes.
- Full jobs process all documents, whether updated or not, and all dictionary concept changes.
Incremental content processing jobs are managed as scheduled processes by the Knowledge Search Batch Process job. The value of the Knowledge Search Batch Processing job should be set to 15 minutes. This value ensures that incremental jobs will run every 15 minutes. Full jobs can be run on-demand as required. You can view the log summary for a completed job.

**Related Topics**

- Scheduling Knowledge Processes: Procedure

**How can I find Knowledge articles in list view?**

There is no restriction to the number of articles you can create for a content type. However, when you select List for a content type, the list is restricted to 200 items.

If you have more than 200 articles in a content type, use one of the following methods to change the articles shown in the list:

- Document ID search, if you know the article document ID
- User list filtering to see articles by a specific user
- List sorting to change how the list is sorted

**How can I make Knowledge updates available to users?**

When authors publish articles, the articles are available to users only after the application updates the knowledge base. Knowledge updates take place at regular intervals. Since publishing can occur at any time, and knowledge base updates occur at fixed intervals, some time may elapse between publishing an article and its availability.
6 Analyzing Knowledge

About Knowledge Analytics

Knowledge Analytics is a real-time reporting solution that enables knowledge managers and knowledge analysts to view knowledge author’s activity. This feature offers prebuilt dashboards that help knowledge managers to understand how authors are creating, updating, and publishing knowledge base articles and how they are linking articles to SRs.

Based on your privileges, you can perform the following tasks:

- Run the prebuilt dashboard reports
- Create personalized dashboards
- Create personalized reports and analyses on subject areas
- Share analytics with other users

Understanding Knowledge Analytics Terminology: Explained

You need to familiarize with the BI objects to understand knowledge analytics.

This table contains important analytics terminology:

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics</td>
<td>Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.</td>
</tr>
<tr>
<td>Analysis</td>
<td>A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>A collection of analyses and other content, presented on one or more pages to help you achieve specific business goals</td>
</tr>
<tr>
<td>Report</td>
<td>An output of select data in a predefined format that is optimized for printing.</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Subject areas are the organizational units in the BI repository that contain metadata that define which columns you can include in analyses. Each subject area has a fact folder and a number of dimension folders.</td>
</tr>
</tbody>
</table>
Managing Analytics with the BI Administrator Role

Knowledge Manager is not authorized to perform high level tasks in the BI application. You need the BI Administrator role to perform the following tasks:

- Personalizing dashboards, reports, and analyses
- Managing catalog groups
- Assigning privileges
- Scheduling publisher

To create and assign the BI administrator role, use the process described in the Oracle Sales Cloud Creating and Administering Analytics guide.

Related Topics
- Managing Analytics with the BI Administrator Role

Responsive Sizing for Knowledge Analytics: Explained

You can enable responsive sizing to optimize analytics display on devices that have different screen resolution and size, such as laptops, tablets, and mobile phones.

To enable responsive sizing, use the process described in the Oracle Sales Cloud Creating and Administering Analytics guide.

Related Topics
- Responsive Sizing for Sales Analytics: Overview

Managing the BI Catalog Folders

All of your reports, analyses, and dashboards are stored and managed in the Oracle Business Intelligence (BI) catalog. The pre-built knowledge dashboards are stored in the BI Catalog under Shared Folders in the Service Folder and are organized as follows:

- **Subject Area Contents**: This folder contains data related to subject areas.
- **Analytics Library**: This folder contains generic analytics content which is not role-specific.
- **Embedded Content**: All the Knowledge dashboards are available in the Knowledge Analyst folder. You can use this folder to view and personalize the prebuilt dashboards.

Navigating to the Catalog

To access the catalog:

1. Click **Tools, Reports and Analysis** from the Knowledge Home page.
2. Click **Browse Catalog** in the Reports and Analytics page. The **Catalog** folder opens.

**Saving Analytics to the BI Catalog**

Knowledge Managers can save analyses, dashboards, and reports in the BI catalog. The catalog contains a hierarchy of folders that enables you to store objects. You can also create additional folders and add permissions to these folders.

**Note:** Knowledge Analysts can only view prebuilt dashboards and run reports and analyses that they have access to.

- **Shared Folders:** This folder contains prebuilt dashboards and personalized analytics that you have permission to access. All the users with permissions to this folder can view your data. The shared folder contains Custom and Service sub-folders.
- **Custom Folder:** This is a sub-folder of the Shared Folders. You need to save a copy of prebuilt dashboards to this folder before editing them.
- **My Folders:** This folder contains reports and analyses that you have created. Only you can access the contents of this folder. To share the analytics available in this folder, you need to copy and save the analytics to the Shared Folders.

To create folders and add permissions to it, use the process described in the Oracle Sales Cloud Creating and Administering Analytics guide.

**Related Topics**

- Creating Folders: Procedure
- Setting Folder Permissions and Attributes: Procedure

**About Dashboards: Explained**

A dashboard is a collection of reports and analyses organized to display data in a single view. The prebuilt dashboards are available in the BI catalog. The Knowledge Analysts can view prebuilt dashboards and the Knowledge Managers can create personalized dashboards. The information displayed in a dashboard is organized by a set of parameters and metrics. For example, the All Knowledge Breakdown dashboard contains data about all the articles available by products, by categories, by content types, and by locales.

You can access dashboards to view analytics for the following types of transactions:

- **All Knowledge:** Generates analytics for all the knowledge transactions.
- **My Knowledge:** Generates analytics for your transactional data.

It is always advised to copy the prebuilt dashboard from "Shared Folders" to "Custom" folder before you can edit it.

The following table explains the list of prebuilt dashboards available:

<table>
<thead>
<tr>
<th>Dashboard Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Knowledge by Day/ Week/Month</td>
<td>This dashboard shows all the user activity for the last 12 days/ 12 weeks/ 12 months.</td>
</tr>
</tbody>
</table>
Dashboard Name | Description
---|---
My Knowledge by Day/Week/Month | This dashboard shows the individual activity for the last 12 days/12 weeks/12 months.

All Knowledge Breakdown | This dashboard shows the content available in the repository for the By Product, By Category, By Content Type, and By Locale article attributes.

### Accessing Prebuilt Dashboards: Procedure

The prebuilt dashboards are available in the Catalog folder.

To access dashboards:

1. Click **Tools, Reports and Analysis** and then click **Browse Catalog**.

   The **Catalog** page opens.

2. From the Folders hierarchy, expand Shared Folders, Service, Embedded Content, Knowledge Analyst, Dashboards and then select a dashboard.

3. Click **Open**.

   The dashboard displays the analytics. You can also filter the dashboards with the following content volume metrics:

<table>
<thead>
<tr>
<th>Metric Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Articles Created</td>
<td>The number of articles created by day/week/month</td>
</tr>
<tr>
<td>All Articles Updated</td>
<td>The number of articles updated by day/week/month</td>
</tr>
<tr>
<td>All Articles Published</td>
<td>The number of articles last published by day/week/month</td>
</tr>
<tr>
<td>All Article Linked</td>
<td>The number of article links done by day.</td>
</tr>
<tr>
<td>Links Done By</td>
<td>The number of links done by you.</td>
</tr>
<tr>
<td>Links Done For</td>
<td>The number of links done for my content.</td>
</tr>
<tr>
<td>By Product</td>
<td>The number of articles by product.</td>
</tr>
<tr>
<td>By Category</td>
<td>The number of articles by category.</td>
</tr>
<tr>
<td>By Content Type</td>
<td>The number of articles by content type.</td>
</tr>
<tr>
<td>By Locale</td>
<td>The number of articles by locale.</td>
</tr>
</tbody>
</table>
Personalizing Dashboards: Procedure

As a knowledge manager, you can personalize the prebuilt dashboards to optimize the data presentation to suit your organizations’ needs.

You can also filter information by the available metrics, add and delete pages and objects, and change dashboard properties.

**Note:** You must copy a prebuilt dashboard and its related objects such as analyses, reports and so on from the Shared Folders location to the Custom folder in order to personalize it.

To personalize a dashboard:

1. Click Tools, Reports and Analysis and then click **Browse Catalog**.
   
   The Catalog page opens.

2. From the Folders hierarchy, expand Shared Folders, Service, Embedded Content, Knowledge Analyst, Dashboards and then select a dashboard.

3. Expand More, click **Copy** to copy the dashboard and then click the **Paste** icon in your Custom folder location.
   
   The dashboard is copied to your location.

4. Copy and Paste the related objects of this dashboard to the Custom folder.

**Note:** You must copy the objects associated with the dashboard to edit it.

5. Click **Edit** and perform one or more of the following tasks, as needed:
   
   - Add and delete pages.
   - Add and remove content of the dashboard.
   - Drag and drop within a page to move content around.
   - Change the layout of a page.

6. Perform one of the following steps at any time:
   
   - To preview the dashboard page, click the **Preview** button.
   - To save your changes, click the **Save** button.
   - To exit the Dashboard builder and return to the Dashboard, click **Run**.

About Subject Areas

Knowledge Analytics uses subject areas to create interactive reports and analyses. Subject areas contain metadata that define which columns are available for you to create a report or analysis.
About Dimensions and Facts

A subject area contains dimensions and facts.

- **Dimension:** Dimensions are the knowledge parameters such as articles, dates, and categories that can be measured using facts. Dimensions contain reference information and serve as columns in the report tables.

  > **Note:** You need to select at least one dimension to generate a report.

- **Facts:** Facts quantify dimensions. In the reports, a fact displays values for the selected dimensions. For example, the measure for Articles dimension is 'Number of Articles'. A fact can be associated with multiple dimensions.

## Article Real Time Subject Area: Explained

The Article Real Time subject area contains information about articles, such as the version, locale, content type, author, and lifecycle dates. This subject area does not include product, category, or linking information.

### Dimensions

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Version</td>
<td>Answer ID</td>
<td>The unique identifier of the article.</td>
</tr>
<tr>
<td>Article Display End Date</td>
<td></td>
<td>The end date after which the article is no longer available for display.</td>
</tr>
<tr>
<td>Article ID</td>
<td></td>
<td>The identifier of the article.</td>
</tr>
<tr>
<td>Article Last Updated Date</td>
<td></td>
<td>The date that the article is last updated.</td>
</tr>
<tr>
<td>Article Latest Version</td>
<td></td>
<td>The latest version of the article.</td>
</tr>
<tr>
<td>Article Locale</td>
<td></td>
<td>The language and region of the article.</td>
</tr>
<tr>
<td>Article Major Version</td>
<td></td>
<td>The value that increments when the article is updated.</td>
</tr>
<tr>
<td>Article Published Date</td>
<td></td>
<td>The date on which the article is published.</td>
</tr>
<tr>
<td>Article Title</td>
<td></td>
<td>The title of the article.</td>
</tr>
<tr>
<td>Creation Date</td>
<td></td>
<td>The date on which the article is added to the repository.</td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Original Creation Date</td>
<td>The date on which the article is originally created and imported.</td>
</tr>
<tr>
<td></td>
<td>Owner ID</td>
<td>The identifier of the article’s owner.</td>
</tr>
<tr>
<td></td>
<td>Published</td>
<td>The article is marked as published.</td>
</tr>
<tr>
<td>Base Locale</td>
<td>Locale Code</td>
<td>The code of the locale to which the article belongs.</td>
</tr>
<tr>
<td></td>
<td>Locale Description</td>
<td>The description of the locale.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Content Type</td>
<td>The type of content such as an article, or FAQ.</td>
</tr>
<tr>
<td>Original Author</td>
<td>User E-mail</td>
<td>The E-mail of the original author of the article.</td>
</tr>
<tr>
<td></td>
<td>User First Name</td>
<td>The first name of the original author of the article.</td>
</tr>
<tr>
<td></td>
<td>User Last Name</td>
<td>The last name of the original author of the article.</td>
</tr>
<tr>
<td></td>
<td>User Locale</td>
<td>The language and region of the original author of the article.</td>
</tr>
<tr>
<td></td>
<td>User Login</td>
<td>The login ID of the original author.</td>
</tr>
<tr>
<td>Secondary Dates</td>
<td>Update Date</td>
<td>The date on which the article is updated.</td>
</tr>
<tr>
<td></td>
<td>Update Day Name</td>
<td>The day on which the article is updated.</td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Period</td>
<td>The enterprise period in which the article is updated.</td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Year</td>
<td>The enterprise year in which the article is updated.</td>
</tr>
<tr>
<td></td>
<td>Update Month</td>
<td>The month in which the article is updated.</td>
</tr>
<tr>
<td></td>
<td>Update Quarter</td>
<td>The quarter in which the article is updated.</td>
</tr>
<tr>
<td></td>
<td>Update Year</td>
<td>The year in which the article is updated.</td>
</tr>
<tr>
<td>Secondary Dates - Additional Attributes</td>
<td>Update Calendar Month</td>
<td>The additional attributes that denote the period in which the article is updated. For more information, see Time Additional</td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Definition</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Update Calendar Month Start Date</td>
<td>Attributes in the Article Links Real Time Subject Area.</td>
</tr>
<tr>
<td></td>
<td>Update Calendar Quarter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Calendar Quarter Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Calendar Quarter End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Calendar Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Calendar Week Start Date</td>
<td></td>
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<tr>
<td></td>
<td>Update Calendar Week End Date</td>
<td></td>
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<tr>
<td></td>
<td>Update Day Of Month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Day Of Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Day Of Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Period End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Period Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Period Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Quarter End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Quarter Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Quarter Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Year End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Year Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Year Period Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Enterprise Year Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Offset Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Update Week By Year</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Date</td>
<td>The Time-related attributes of the article. For more information, see Time attributes in the Articles Links Real Time Subject Area.</td>
</tr>
<tr>
<td></td>
<td>Day Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Period</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Quarter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Week</td>
<td></td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Time - Additional Attributes</td>
<td>Calendar Date</td>
<td>The additional time attributes available. For more information, see Time Additional Attributes in the Article Links Real Time Subject Area.</td>
</tr>
<tr>
<td></td>
<td>Calendar Month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calendar Month End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calendar Month Start Date</td>
<td></td>
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<td></td>
<td>Calendar Quarter</td>
<td></td>
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<tr>
<td></td>
<td>Calendar Week Start Date</td>
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<tr>
<td></td>
<td>Calendar Week End Date</td>
<td></td>
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<tr>
<td></td>
<td>Calendar Week</td>
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<tr>
<td></td>
<td>Calendar Week Start Date</td>
<td></td>
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<tr>
<td></td>
<td>Calendar Week End Date</td>
<td></td>
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<td></td>
<td>Calendar Year</td>
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<td></td>
<td>Calendar Year Start Date</td>
<td></td>
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<tr>
<td></td>
<td>Calendar Year End Date</td>
<td></td>
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<tr>
<td></td>
<td>Day of Month</td>
<td></td>
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<tr>
<td></td>
<td>Day of Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Day of Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Period End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Period Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Period Sort Order</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Period Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Year End Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Year Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Year Period Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enterprise Year Start Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Offset Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Week By Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Year By Week</td>
<td></td>
</tr>
</tbody>
</table>
## Version Author

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>User E-mail</td>
<td>The E-mail, first name, last name, locale, and login details of the author for the current version.</td>
</tr>
<tr>
<td></td>
<td>User First Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Last Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Locale</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Login</td>
<td></td>
</tr>
</tbody>
</table>

## Version Locale

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Locale Code</td>
<td>The locale and its description to which the current version of the article belong.</td>
</tr>
<tr>
<td></td>
<td>Locale Description</td>
<td></td>
</tr>
</tbody>
</table>

## Version Owner

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>User E-mail</td>
<td>The E-mail, first name, last name, locale, and login details of the owner for the current version.</td>
</tr>
<tr>
<td></td>
<td>User First Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Last Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Locale</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Login</td>
<td></td>
</tr>
</tbody>
</table>

## Facts

<table>
<thead>
<tr>
<th>Fact</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Facts</td>
<td># of Article Locales</td>
<td>The number of article locales.</td>
</tr>
<tr>
<td></td>
<td># of Article Versions</td>
<td>The number of article versions.</td>
</tr>
<tr>
<td></td>
<td># of Articles</td>
<td>The number of articles.</td>
</tr>
</tbody>
</table>

### Article Links Real Time Subject Area: Explained

The Article Links Real Time subject area contains information about articles linked to or from service requests. Only articles linked to service requests, and service requests linked to articles, appear in this subject area. All the articles are listed by their IDs in this dashboard.

## Dimensions

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Links</td>
<td>Answer ID</td>
<td>The identifier of the answer.</td>
</tr>
<tr>
<td>Article Links</td>
<td>Article Locale</td>
<td>The locale to which the article belongs.</td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------</td>
<td>----------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>DeletedFlag</td>
<td>The flags that are deleted from an article.</td>
</tr>
<tr>
<td></td>
<td>Link Created By</td>
<td>The user who created the link to the article.</td>
</tr>
<tr>
<td></td>
<td>Link Creation Date</td>
<td>The date on which the link is created.</td>
</tr>
<tr>
<td></td>
<td>Reference ID</td>
<td>The reference identifier of the article link.</td>
</tr>
<tr>
<td></td>
<td>Service Request ID</td>
<td>The identifier of the service request.</td>
</tr>
<tr>
<td>Time</td>
<td>Date</td>
<td>The date on which the article is linked.</td>
</tr>
<tr>
<td></td>
<td>Day Name</td>
<td>The name of the day on which the articles are linked.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Period</td>
<td>The enterprise period in which the articles are linked.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter</td>
<td>The enterprise quarter in which the article is linked.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Year</td>
<td>The enterprise year in which the article is linked.</td>
</tr>
<tr>
<td></td>
<td>Month</td>
<td>The month in which the article is linked.</td>
</tr>
<tr>
<td></td>
<td>Quarter</td>
<td>The quarter in which the article is linked.</td>
</tr>
<tr>
<td></td>
<td>Week</td>
<td>The week in which the article is linked.</td>
</tr>
<tr>
<td></td>
<td>Year</td>
<td>The year in which the article is linked.</td>
</tr>
<tr>
<td>Time- Additional Attributes</td>
<td>Calendar Date</td>
<td>The date of the time period.</td>
</tr>
<tr>
<td></td>
<td>Calendar Month</td>
<td>The identifier of the calendar month.</td>
</tr>
<tr>
<td></td>
<td>Calendar Month End Date</td>
<td>The end date of the calendar month.</td>
</tr>
<tr>
<td></td>
<td>Calendar Month Start Date</td>
<td>The start date of the calendar month.</td>
</tr>
<tr>
<td></td>
<td>Calendar Quarter</td>
<td>The identifier of the calendar quarter.</td>
</tr>
<tr>
<td></td>
<td>Calendar Quarter Start Date</td>
<td>The start date of the calendar quarter.</td>
</tr>
<tr>
<td></td>
<td>Calendar Quarter End Date</td>
<td>The end date of the calendar quarter.</td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Calendar Week</td>
<td>The identifier of the calendar week.</td>
</tr>
<tr>
<td></td>
<td>Calendar Week Start Date</td>
<td>The start date of the calendar week.</td>
</tr>
<tr>
<td></td>
<td>Calendar Week End Date</td>
<td>The end date of the calendar week.</td>
</tr>
<tr>
<td></td>
<td>Calendar Year</td>
<td>The number identifier of the calendar year.</td>
</tr>
<tr>
<td></td>
<td>Calendar Year Start Date</td>
<td>The start date of the calendar year.</td>
</tr>
<tr>
<td></td>
<td>Calendar Year End Date</td>
<td>The end date of the calendar year.</td>
</tr>
<tr>
<td></td>
<td>Day of Month</td>
<td>The day of the month.</td>
</tr>
<tr>
<td></td>
<td>Day of Week</td>
<td>The day of the week.</td>
</tr>
<tr>
<td></td>
<td>Day of Year</td>
<td>The day of the year.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Period End Date</td>
<td>The end date of the enterprise period.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Period Number</td>
<td>The identifier of the enterprise period.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Period Sort Order</td>
<td>The sort order</td>
</tr>
<tr>
<td></td>
<td>Enterprise Period Start Date</td>
<td>The start date of the enterprise period.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter End Date</td>
<td>The end date of the enterprise quarter</td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter Number</td>
<td>The number identifier of the enterprise quarter</td>
</tr>
<tr>
<td></td>
<td>Enterprise Quarter Start Date</td>
<td>The start date for the enterprise quarter</td>
</tr>
<tr>
<td></td>
<td>Enterprise Year End Date</td>
<td>The end date of the enterprise year.</td>
</tr>
<tr>
<td></td>
<td>Enterprise Year Number</td>
<td>The number of the enterprise year</td>
</tr>
<tr>
<td></td>
<td>Enterprise Year Period Number</td>
<td>The period of the enterprise year</td>
</tr>
<tr>
<td></td>
<td>Enterprise Year Start Date</td>
<td>The start date of the enterprise year.</td>
</tr>
<tr>
<td></td>
<td>Offset Week</td>
<td>The week that can be compared to the previous week.</td>
</tr>
</tbody>
</table>
Chapter 6
Analyzing Knowledge

### Dimensions

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Category</td>
<td>Base Service Category ID</td>
<td>The identifier of the category to which the base service belongs.</td>
</tr>
<tr>
<td></td>
<td>Base Service Category Name</td>
<td>The name of the category to which the base service belongs.</td>
</tr>
<tr>
<td></td>
<td>Base Unit ID</td>
<td>The identifier of the business unit.</td>
</tr>
<tr>
<td></td>
<td>Fixed Hierarchy Level</td>
<td>The level of the fixed hierarchy</td>
</tr>
<tr>
<td></td>
<td>Level 1 Service Category ID</td>
<td>The identifier of the service category available at level 1.</td>
</tr>
<tr>
<td></td>
<td>Level 1 Service Category Name</td>
<td>The name of the service category available at level 1.</td>
</tr>
<tr>
<td></td>
<td>Level 2 Service Category ID</td>
<td>The identifier of the service category available at level 2.</td>
</tr>
<tr>
<td></td>
<td>Level 2 Service Category Name</td>
<td>The name of the service category available at level 2.</td>
</tr>
<tr>
<td></td>
<td>Level 3 Service Category ID</td>
<td>The identifier of the service category available at level 3.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Facts

<table>
<thead>
<tr>
<th>Fact</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Links Facts</td>
<td># of Article Links</td>
<td>The number of article links.</td>
</tr>
</tbody>
</table>

### Article Category Real Time Subject Area: Explained

The Article Category Real-time subject area contains information about the categories that articles belong to. This subject area displays one-to-many relationship from an article to categories.

**Dimensions**

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Category</td>
<td>Base Service Category ID</td>
<td>The identifier of the category to which the base service belongs.</td>
</tr>
<tr>
<td></td>
<td>Base Service Category Name</td>
<td>The name of the category to which the base service belongs.</td>
</tr>
<tr>
<td></td>
<td>Base Unit ID</td>
<td>The identifier of the business unit.</td>
</tr>
<tr>
<td></td>
<td>Fixed Hierarchy Level</td>
<td>The level of the fixed hierarchy</td>
</tr>
<tr>
<td></td>
<td>Level 1 Service Category ID</td>
<td>The identifier of the service category available at level 1.</td>
</tr>
<tr>
<td></td>
<td>Level 1 Service Category Name</td>
<td>The name of the service category available at level 1.</td>
</tr>
<tr>
<td></td>
<td>Level 2 Service Category ID</td>
<td>The identifier of the service category available at level 2.</td>
</tr>
<tr>
<td></td>
<td>Level 2 Service Category Name</td>
<td>The name of the service category available at level 2.</td>
</tr>
<tr>
<td></td>
<td>Level 3 Service Category ID</td>
<td>The identifier of the service category available at level 3.</td>
</tr>
</tbody>
</table>
## Dimension

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 3 Service Category Name</td>
<td></td>
<td>The name of the service category available at level 3.</td>
</tr>
<tr>
<td>Level 4 Service Category ID</td>
<td></td>
<td>The identifier of the service category available at level 4.</td>
</tr>
<tr>
<td>Level 4 Service Category Name</td>
<td></td>
<td>The name of the service category available at level 4.</td>
</tr>
<tr>
<td>Level 5 Service Category ID</td>
<td></td>
<td>The identifier of the service category available at level 5.</td>
</tr>
<tr>
<td>Level 5 Service Category Name</td>
<td></td>
<td>The name of the service category available at level 5.</td>
</tr>
<tr>
<td>Level 6 Service Category ID</td>
<td></td>
<td>The identifier of the service category available at level 6.</td>
</tr>
<tr>
<td>Level 6 Service Category Name</td>
<td></td>
<td>The name of the service category available at level 6.</td>
</tr>
<tr>
<td>Level 7 Service Category ID</td>
<td></td>
<td>The identifier of the service category available at level 7.</td>
</tr>
<tr>
<td>Level 7 Service Category Name</td>
<td></td>
<td>The name of the service category available at level 7.</td>
</tr>
<tr>
<td>Level 8 Service Category ID</td>
<td></td>
<td>The identifier of the service category available at level 8.</td>
</tr>
<tr>
<td>Level 8 Service Category Name</td>
<td></td>
<td>The name of the service category available at level 8.</td>
</tr>
<tr>
<td>Stripe</td>
<td></td>
<td>The stripe to which the category belong.</td>
</tr>
<tr>
<td>Top Level Service Category ID</td>
<td></td>
<td>The identifier of the service category available at the top level.</td>
</tr>
<tr>
<td>Top Level Service Category Name</td>
<td></td>
<td>The name of the service category available at the top level.</td>
</tr>
</tbody>
</table>

## Facts

<table>
<thead>
<tr>
<th>Fact</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Category Facts</td>
<td># of Article Categories</td>
<td>The number of categories associated with a given article.</td>
</tr>
</tbody>
</table>
### Article Product Real Time Subject Area: Explained

The Article Product Real-time subject area contains information about the products that articles belong to. This subject area displays one-to-many relationship from an article to products.

#### Dimensions

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Article Catalog Hierarchy 1 Name</td>
<td>The name of the article catalog hierarchy at level 1.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 2 Name</td>
<td>The name of the article catalog hierarchy at level 2.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 3 Name</td>
<td>The name of the article catalog hierarchy at level 3.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 4 Name</td>
<td>The name of the article catalog hierarchy at level 4.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 5 Name</td>
<td>The name of the article catalog hierarchy at level 5.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 6 Name</td>
<td>The name of the article catalog hierarchy at level 6.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 7 Name</td>
<td>The name of the article catalog hierarchy at level 7.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy 8 Name</td>
<td>The name of the article catalog hierarchy at level 8.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy Base Level Name</td>
<td>The name of the article catalog present at the base level of the hierarchy.</td>
</tr>
<tr>
<td></td>
<td>Article Catalog Hierarchy Top Level Name</td>
<td>The name of the article catalog present at the top level of the hierarchy.</td>
</tr>
<tr>
<td></td>
<td>ItemDeleteFlag</td>
<td>The item is marked to be deleted</td>
</tr>
<tr>
<td></td>
<td>OrderableFlag</td>
<td>The item is marked as ready to select.</td>
</tr>
<tr>
<td></td>
<td>Part Number</td>
<td>The product’s part number.</td>
</tr>
<tr>
<td></td>
<td>ProdGroupDeleteFlag</td>
<td>The product group is marked to be deleted.</td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------</td>
<td>------------</td>
</tr>
<tr>
<td></td>
<td>Prod Group Effective End Date</td>
<td>The end date of the product group.</td>
</tr>
<tr>
<td></td>
<td>Prod Group Effective Start Date</td>
<td>The start date of the product group.</td>
</tr>
<tr>
<td></td>
<td>Product Description</td>
<td>The description of the product.</td>
</tr>
<tr>
<td></td>
<td>Product Line</td>
<td>The line to which the product belongs.</td>
</tr>
<tr>
<td></td>
<td>Product Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td></td>
<td>Product Row ID</td>
<td>The row identifier of the product.</td>
</tr>
<tr>
<td></td>
<td>Product Type</td>
<td>The type of product.</td>
</tr>
<tr>
<td></td>
<td>Usage Code</td>
<td>Denotes which kind of product it is associated with. They can be Base usage, service usage, and HCM usage codes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fact</th>
<th>Attribute</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Product Facts</td>
<td># of Article Products</td>
<td>The number of products associated with the articles.</td>
</tr>
</tbody>
</table>

**Article Real Time Rating Subject Area: Explained**

The Article Real Time Rating subject area contains information about article ratings, such as ratings values, rated article details, and the users who rated the articles. The subject area helps analysts identify content that satisfies users’ needs, content that users are dissatisfied with, and content linked to SRs that is effective in resolving them.

**Dimensions**

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratings</td>
<td>Rating Type</td>
<td>The ID of the rating type, 2.0 for like/dislike or 4.0 for 5 star.</td>
</tr>
<tr>
<td></td>
<td>Rating Name</td>
<td>The name of rating type, 5 star or like/dislike.</td>
</tr>
<tr>
<td>Rating Values</td>
<td>Rating Value</td>
<td>The actual rating value recorded.</td>
</tr>
<tr>
<td></td>
<td>Date Added</td>
<td>The date that the user rated the article.</td>
</tr>
<tr>
<td>Dimension</td>
<td>Attribute</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rating Facts</td>
<td>Average Rating</td>
<td>The average of all ratings of an article.</td>
</tr>
<tr>
<td></td>
<td># of Ratings</td>
<td>The total number of ratings of an article.</td>
</tr>
<tr>
<td></td>
<td># of Rated Articles</td>
<td>The total number of articles rated by all users in the selected time period.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Content Type</td>
<td>The content type of the rated article.</td>
</tr>
<tr>
<td>Article</td>
<td>Article Display End Date</td>
<td>The last date on which the article will be available to end-users.</td>
</tr>
<tr>
<td></td>
<td>Article ID</td>
<td>The article ID.</td>
</tr>
<tr>
<td></td>
<td>Article Last Updated Date</td>
<td>The date on which the article was most recently updated.</td>
</tr>
<tr>
<td>Locale</td>
<td></td>
<td>The locale in which the article is published.</td>
</tr>
<tr>
<td>Creation Date</td>
<td></td>
<td>The article on which the article was created.</td>
</tr>
<tr>
<td>Rating Added By</td>
<td>User E-mail</td>
<td>The e-mail address of the user who rated the article.</td>
</tr>
<tr>
<td></td>
<td>User First Name</td>
<td>The rating user’s first name.</td>
</tr>
<tr>
<td></td>
<td>User Last Name</td>
<td>The rating user’s last name.</td>
</tr>
<tr>
<td></td>
<td>User Locale</td>
<td>The locale of the user who rated the article.</td>
</tr>
<tr>
<td></td>
<td>User Login</td>
<td>The login of the user who rated the article.</td>
</tr>
<tr>
<td>Time</td>
<td>Date</td>
<td>The time-related attributes of the article. For more information, see Time Attributes in the Article Links Real Time Subject Area.</td>
</tr>
<tr>
<td></td>
<td>Day Name</td>
<td></td>
</tr>
<tr>
<td>Enterprise Period</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprise Quarter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprise Year</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### How can I Use Subject Areas to Answer Business Questions?

Knowledge managers can create personalized reports and analyses to view information related to a specific transaction. You can start building reports and analyses once you identify the business questions that you want to answer. Each knowledge subject area is built around a unique set of business questions for a particular context such as article counts on knowledge contents being published, linked to SRs and so on.

You can choose the appropriate facts and dimensions listed in a subject area to answer your business questions. Using different combinations of facts and dimensions, you can generate different types of reports.

The following table lists the business questions specific to each subject area:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Version Locale | Locale Code | The locale and its description to which the current version of the article belongs. |
|               |             |                                             |
|               | Locale Description |                                         |

<table>
<thead>
<tr>
<th>Facts</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating Facts</td>
<td># of Rating</td>
<td>The number of ratings that were entered by all users in the selected time period.</td>
</tr>
</tbody>
</table>

| Average Rating | The sum of all rating values divided by the number of ratings entered. |
| # of Rated Articles | The number of articles that were rated by all users in the selected time period. |
### Creating Personalized Reports: Procedure

Knowledge managers can create personalized reports using subject areas. You need to identify the dimensions, facts, and filters to generate a report. You can also select two subject areas that share common dimensions to add additional data to your report.

> **Note:** Knowledge Analysts can only run the personalized reports that the Knowledge manager has created.

To create a personalized report:

1. From the Navigation menu, click **Tools** and select **Reports and Analysis**.
   
   The Reports and Analytics page opens.

2. Click **Create, Report**.
   
   The Oracle Business Intelligence home page displays the Create Report wizard.

3. To build the report on a subject area, click **Use Subject Area** and select the appropriate Subject Area from the drop-down list.

4. Click **Next** and select the **Page** and **Layout** options.

5. To create a chart or graph, drag and drop fields from the **Data Source** pane into the layout.

> **Note:** To add additional subject areas to this report, click Add/Remove icon and select another subject area.

6. Click **View Report** to run and view the report and **Edit Report** to modify the report.

7. Click **Finish** and select the folder destination to enter a **Name** and **Description** for the report and then click **OK**.

   The report is created.
Creating Personalized Analyses: Procedure

As a Knowledge Manager, you can create an analysis using subject areas.

 boasted: Knowledge Analysts can only run the personalized analyses that the Knowledge manager has created.

To create an analysis:

1. **Click Tools, Reports and Analysis.**
   The Reports and Analytics page appears.

2. **Click Create, Analysis.**
   The Select Subject Area window displays.

3. **Select the subject area check box and click Continue.**
   The Create Analysis: Select Columns pane lists all the available columns, facts, and attributes.

4. **Expand the subject area and add columns to the analysis and then click Next.**
   The Create Analysis: Select View pane lists the table, graph, and layout options available.

5. **Enter a Title for the analysis and select the Table, Graph, and Layout options from the drop-down lists.**
   boasted: You can Preview the analysis and edit the table and graph layouts.

6. **Click Next.**
   The Create Analysis: Sort and Filter page opens.

7. **To filter the report, follow these steps:**
   a. **Click Add Sort and select a column to sort the analysis in a specific order.**
   b. **Click Add Filter and select the column.**
   c. **Select the Operator from the drop-down list and enter the filter Value.**
      The drill-down for the analysis appears.
   d. Additionally, you can apply conditional highlight formatting to the analysis in the Create Analysis: Highlighting page.

8. **Enter the Analysis Name, Description, and select the destination folder where you want to save the analysis.**
   boasted: Analysis saved in the Shared Folders location is visible to all the users. You can save the analysis in My Folders location for your personal use.

9. **Click Submit.**
   A Confirmation message appears that the analysis is saved successfully.
Searching for Reports and Analyses: Procedure

When you search for analytics, the search results include all your prebuilt and personalized dashboards, reports and analyses. To locate an analysis or a report:

1. From the Navigation menu, click **Tools** and select **Reports and Analysis**.

   The **Reports and Analytics** page displays.

2. Click the **Hierarchical Selector** icon to filter the folder location.

   The All Folders catalog is selected by default.

3. To filter the search results, select the filter type and enter the name of the report or analysis in the search text field. You can also click **Clear Filter** to reset the filters.

4. Click the **Search** icon.

   The search results that match your criteria appears.

5. Click the **star** icon.

   The analytic is added to your favorites list.

Sharing Analytics

You can share the analytics that you have created with other users as a briefing book. A briefing book consists of dashboard pages, reports and analyses. To generate a briefing book, you need to select the analytics, add the contents to the book and save it to the BI catalog. You can download the briefing book in PDF or HTML formats and share it with the other users.

To add contents to a briefing book and share it with others, you can use the procedure explained in the Oracle Sales cloud Creating and Administering Analytics guide.

**Related Topics**

- Printing and Sharing Analytics: Overview
Managing the Search Dictionary

Managing the Search Dictionary: Explained

You can use the Manage Search Dictionary tool to view, edit, and add concepts and synonyms to the dictionary. You can add terms that are important to your organization and your users, including specific products and services, as well as the synonyms (acronyms, abbreviations, alternative names, and legacy names) that agents, customers, and authors might use when searching for answers to questions.

The dictionary enables search users to quickly and easily find answers in the knowledge base without knowing specific terminology or how the content is worded or organized. Search automatically matches users’ questions to the best answer.

Importing and Exporting the Dictionary: Procedure

You can import and export a dictionary as explained in the following steps:

Concepts and Synonyms: Overview

A concept is an important term used in your organization or by your users. Concepts include products, services, and other terms that have specific meaning in your industry. Concepts have synonyms, which are words that have similar meanings, and also abbreviations, acronyms, legacy names, or other alternative names that people might use when seeking answers to questions. For example, the concept plan in your industry and organization might include the synonyms agreement and proposal. The dictionary treats concepts and their synonyms as a single object.

When you implement Knowledge, the dictionary already includes many common and industry-specific concepts and their synonyms. In addition, it automatically creates concepts for the products defined in your product hierarchy.

You can update the dictionary by adding new concepts and synonyms, and by modifying existing concepts and synonyms to ensure that search is matching your users’ questions to the best answers in the knowledge base. For example, adding synonyms to automatically created product names can help answer users’ questions about those products when they use abbreviations, acronyms, or other alternative terms. Knowledge analytics can also help you identify possible dictionary updates to improve search accuracy.

Listing Concepts: Procedure

You can list the automatically created product concepts and any concepts that you have updated or added to the dictionary.

To list these concepts, do the following:

1. Sign in to the application, and from the navigator, click Setup and Maintenance.
2. From the Setup drop-down list, select the Service offering.
3. Select Knowledge Management from the functional areas, and then select the Knowledge Management Search Dictionary task.
The Manage Search Dictionary page displays the product concepts and concepts that your organization has created or modified.

**Note:** The dictionary is organized by language, not by locale. All locales based on the same language use the same set of dictionary concepts and synonyms.

### Finding Concepts: Procedure

You can use the Find feature to locate concepts.

To locate concepts, do the following:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. In the Manage Synonyms pane, enter a concept, or a partial concept name, in the **Find** text field.
3. Click the search icon.

   The search results display concepts that match your search criteria in all your active languages. The search results include enabled and disabled concepts.

### Adding Concepts and Synonyms: Procedure

You can add concepts to the search dictionary. You can also add, update, and delete synonyms for existing concepts.

To add concepts and synonyms:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. Click the + symbol in the **Manage Search Dictionary** page.
3. Complete the fields **Concept Name** and **Description**.
4. To add a synonym, click the + symbol in the **Concept Details** window.
5. Enter the **Synonym** name and select the **Language** from the drop-down list and save it.

**Note:** You can add synonyms only for your active languages.

### Updating Concepts: Procedure

You can update concepts and synonyms, and enable or disable concepts. Search ignores disabled concepts when matching users questions to the articles in the knowledge base.

To update a concept, do the following:

1. Locate and double-click on the concept to open the **Concept Details** window.
2. Edit the concept description in the **Description** text box if desired.
3. Add or edit synonyms as desired.
4. Click **Save** or **Save and Close** to update the changes.
To enable or disable a concept, do the following:

1. Locate and double-click on the concept to open the Concept Details window.
2. Click on the check box to change the state of the concept.
3. Click Save or Save and Close to update the changes.