**Oracle® Knowledge Management**

Implementation Guide

Release 11*i*

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Oracle Knowledge Management Implementation Guide, Release 11*i*

Part No.  B13729-02

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**Oracle Knowledge Management Implementation Guide, Release 11*i***

**Part No. B13729-02**

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# Preface

## Intended Audience

Welcome to Release 11*i* of the *Oracle Knowledge Management Implementation Guide*.

Welcome to the Oracle Knowledge Management Implementation Guide. This document is intended for Information Technology professionals who implement Oracle Knowledge Management. This guide assumes you have a working knowledge of:

- The principles and customary practices of your business area.

- Oracle Knowledge Management. If you have never used Oracle Knowledge Management, Oracle suggests you attend one or more of the Oracle Knowledge Management training classes that are available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Related Documents on page  x  for more Oracle Applications product information.

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## Related Documents

**Documents Related to All Products**

**Oracle Applications User's Guide**

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Knowledge Management (and any other Oracle Applications products). This guide also includes information on setting user profiles, in addition to running and reviewing reports and concurrent processes. You can access this user's guide online by choosing Getting Started with Oracle Applications from any Oracle Applications help file.

**Documents Related to This Product**

**Installation and System Administration**

**Oracle Applications Concepts**. Refer to this guide for an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

**Installing Oracle Applications**. Refer to this guide for instructions on managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

**Upgrading Oracle Applications**. Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

**Oracle Applications Maintenance Procedures**. Refer to this guide for information on configuring your system, maintaining your system, applying patches. This guide also includes information on migrating files and databases, reporting and tracking, and troubleshooting.

**Oracle Applications Maintenance Utilities**. Refer to this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

**Oracle Applications CRM System Administrator's Guide**. Refer to this guide for information on implementing the Oracle CRM Technology Foundation (JTT).

**Oracle Applications System Administrator's Guide**. Refer to this guide for planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

**Oracle Applications Developer's Guide**. Refer to this guide for the coding standards that the Oracle Applications development staff follows. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the Oracle Applications User Interface Standards for Forms-Based Products. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

**Oracle Applications User Interface Standards for Forms-Based Products**. Refer to this guide for the user interface (UI) standards that the Oracle Applications development staff follows. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

**Other Implementation Documentation**

**Multiple Reporting Currencies in Oracle Applications**. Refer to this guide if you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Knowledge Management. This manual details additional steps and setup considerations for implementing Oracle Knowledge Management with this feature.

**Multiple Organizations in Oracle Applications**. Refer to this guide for descriptions of how to set up and use Oracle Knowledge Management with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Knowledge Management.

**Oracle Alert User's Guide**. Refer to this guide for information on defining periodic and event alerts to monitor the status of your Oracle Applications data.

**Oracle Workflow Guide**. Refer to this guide for information on defining new workflow business processes in addition to customizing existing Oracle Applications-embedded

workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

**Oracle Applications Flexfields Guide**. Refer to this guide for flexfields planning, setup and reference information for the Oracle Knowledge Management implementation team in addition to users who are responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

**Oracle eTechnical Reference Manuals**. eTechnical Reference Manuals (eTRMs) contain database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*MetaLink*.

**Oracle Manufacturing APIs and Open Interfaces Manual**. Refer to this manual for up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

**Oracle Order Management Suite APIs and Open Interfaces Manual**. Refer to this manual for up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

**Oracle Applications Message Reference Manual**. Refer to this manual for descriptions of Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

**Oracle Common Application Components Implementation Guide**. Refer to this guide to implement common application components that the CRM suite of products leverages. These components include Resource Manager, Notes, Spreadtable, Assignment Manager, Task Manager, Calendar, escalation Manager, Business Rule Monitor, and User Management.

**Oracle Common Application Components API Reference Guide**. Refer to this guide for information on the public APIs for Resource Manager, Task Manager, and Notes.

**Oracle Common Application Components User's Guide**. Refer to this guide for information on using the common application components that the CRM suite of products leverages. These components include Resource Manager, Notes, Spreadtable, Assignment Manager, Task Manager, Calendar, escalation Manager, Business Rule Monitor, and User Management.

**Training and Support**

**Training**. Oracle offers training courses to help you and your staff master Oracle Knowledge Management and reach full productivity quickly. You have a choice of educational environments. You can attend courses that Oracle University offers at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

**Support**. From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Knowledge Management working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

*OracleMetaLink.* Oracle*MetaLink* is your self-service support connection with Web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use Oracle*MetaLink*, register at http://metalink.oracle.com.

Alerts: You should view OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page at: Top Tech Docs/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You can also find information by navigating to the Self-Service Toolkit page at: Top Tech Docs/ERP Applications/Applications Installation and Upgrade.

## Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

# Part 1

## Getting Started

This part of the *Oracle Knowledge Management Implementation Guide* contains the following chapters:

- Introduction, page 1- 1
- Before You Begin, page 2- 1

# 1

# Introduction

This chapter covers the following topics:

- Overview
- Key Features
- Integration
- System Requirements

## Overview

Oracle Knowledge Management is an information management system that uses knowledge capture, storage, and distribution tools that Oracle has developed. Implementing Oracle Knowledge Management provides the features of solution search, creation, organization, and access to new solutions. Oracle Knowledge Management provides focused results that more directly relate to the issue being researched, thus reducing the cost of providing service while increasing customer satisfaction and gaining an edge over competitors.

Oracle Knowledge Management provides solution management functionality to other Oracle Applications, such as Oracle iSupport, Oracle TeleService, Oracle Field Service, Oracle Depot Repair, and Oracle eMail Center. The architecture supports diverse use. Other Oracle products share the architecture.

You can classify information in Oracle Knowledge Management into different subject areas. You can set up different levels of access controls to restrict the access of information for different types of users.

## Key Features

Key features in Oracle Knowledge Management include:

- Flexible Structure of Knowledge, page 1- 1
- Security Control on Data, page 1- 2
- Effective Text Searching, page 1- 2
- Integration With Other Oracle Applications, page 1- 2
- Solution Management, page 1- 2
- Agent-Facing Flows in OA Framework, page 1- 3

**Flexible Structure of Knowledge**

The flexible structure of knowledge offers you:

- Categorization of Solutions, page 1- 2
- Creation and Searching by Multiple Solution Types, page 1- 2

**Categorization of Solutions**

In Oracle Knowledge Management, solutions are segregated in categories or folders for browsing or for performing a category-specific search for solutions.

A merchant can categorize solutions for retrieval by its users. A user can choose a category or a subcategory during search to direct the search to a specific information area.

**Creation and Searching by Multiple Solution Types**

Information in Oracle Knowledge Management is organized into solutions, which is a collection of statements. You can create multiple Solution Types to organize solutions. You can also search by either the **Symptom-Cause-Action** (default) Solution Type or any other Solution Type, such as **Problem and Resolution**, that you can create.

**Security Control on Data**

Solution Security allows you to restrict which areas of the knowledge base that users can search and browse. It also provides the ability to control the categories in which a Knowledge Worker can create and update solutions.

Security for solutions and Solution Categories are based on:

- **Category Security Group** (also known as **Category Group**): Controls the part of the category tree that you can access.
- **Visibility**: Indicates how sensitive the category, solution or statement is on a linear scale. Solution and category Visibility is extensible.

**Effective Text Searching**

Oracle Knowledge Management integrates with Oracle Text to provide the text searching functionality. Oracle Knowledge Management allows users to search using different search options, such as Any Keywords, or All Keywords. To focus search results, you can search for solutions under different products, platforms, or categories.

Scoring of each solution is based on the text match that Oracle Text performs. The maximum score is 100. Solution scores vary depending on the search method that you are using.

The search score can incorporate users' feedback.

Oracle Knowledge Management provides the Simple Search to allow you to search for solutions and other useful information, such as Service Request and Forum messages. You can include different repositories in the Simple Search. If you would like to perform a more detailed and expanded search on solutions, you can use the Advanced Solution Search.

**Integration With Other Oracle Applications**

Oracle Knowledge Management integrates with other Oracle Applications, such as Oracle iSupport, Oracle TeleService, Oracle Field Service, Oracle Depot Repair, and Oracle eMail Center. Users of all these applications can search the same knowledge base for solutions and contribute new solutions to the knowledge base.

**Solution Management**

Oracle Knowledge Management provides the functionality to create, update, and approve solutions. A solution is a structured piece of knowledge that consists of the following primary attributes: title, type, Visibility, an associated category, and statements. You can classify solutions by associating the solutions to items (products) or platforms. Solution can also contain attachments, task group templates, and references to external objects.

Oracle Knowledge Management provides an HTML content creation tool for those who create statements through the Rich Text Editor. While creating a statement, you can find matching statements in the knowledge base to prevent duplication. You can reuse statements in more than one solution.

When you work on a solution, you can lock the solution and work on a local copy before the solution is ready to submit for approval.

When the solution is ready for submission, you can preview the solution before submitting it. The preview allows users to detect any potential errors and correct mistakes in the solution content.

Solution reviewers can use comments as a communication channel.

**Agent-Facing Flows in OA Framework**

Oracle Knowledge Management agent pages use the OA framework. The look and feel of the application is consistent with the rest of the Oracle Applications. Oracle Applications provides better personalization support.

# Integration

Oracle Knowledge Management integrates with:

- Oracle TeleService
- Oracle Depot Repair
- Oracle Field Service
- Oracle iSupport
- Oracle eMail Center
- Oracle Partners Online

For information on how these products integrate with Oracle Knowledge Management, see Integration, page 8- 1 .

# System Requirements

The hardware and software components required to implement Oracle Knowledge Management largely depend on your particular installation. For information on system requirements, see the *Installing Oracle Applications* manual and the *Oracle Applications CRM System Administrator's Guide*.

# 2

# Before You Begin

This chapter covers the following topics:

- About This Chapter
- Related Documentation and Training
- Dependencies
- Installation and Dependency Verification

## About This Chapter

This chapter describes resources and dependencies that you must be familiar with before you implement Oracle Knowledge Management.

## Related Documentation and Training

The following documents provide information about Oracle Knowledge Management and integrated products:

- *Oracle Knowledge Management User's Guide*
- *Oracle iSupport Implementation and User Guide*
- *Oracle TeleService User Guide*
- *Oracle TeleService Implementation Guide*
- *Oracle eMail Center User Guide*
- *Oracle eMail Center Implementation Guide*
- *Oracle Depot Repair User Guide*
- *Oracle Depot Repair Implementation Guide*
- *Oracle Field Service User Guide*
- *Oracle Field Service Implementation Guide*

For information on how these products integrate with Oracle Knowledge Management, see Integration, page 8- 1 .

# Dependencies

This section describes mandatory and optional dependencies for Oracle Knowledge Management.

## Mandatory Dependencies

Oracle Knowledge Management integrates with other Oracle modules to provide and extend its functionality. For Oracle Knowledge Management to run, you must set up the following mandatory modules:

- Oracle Application Foundation, page 2- 2
- Oracle Text, page 2- 2
- Oracle Human Resources, page 2- 2
- Oracle Common Application Components, page 2- 2
- Oracle CRM Foundation, page 2- 3

**Oracle Application Foundation**

The Oracle Application Foundation provides a collection of module components and facilities for building and adding extensions to Oracle Applications. It is a required dependency of all Oracle Application modules. Oracle Knowledge Management uses Oracle Applications Foundation to access all standard library objects, for example, users, menus, responsibilities, and profile options.

For more information, see:

- *Oracle Applications System Administrator's Guide*
- *Oracle Applications User's Guide*
- *Oracle Self-Service Web Applications Implementation Manual*
- *Oracle Applications Framework Configuration Notes Release 11i (11.5.10)*
- *Oracle Applications Framework Installation Troubleshooting Release 11i (11.5.10)*
- *Oracle Applications Framework Profile Options Release 11i (11.5.10)*

**Oracle Text**

You must set up Oracle Text to use Oracle Knowledge Management's search functionality.

Oracle Text provides integrated management of free-form text stored in the database, on Web sites, or on file systems. It extends the Oracle SQL query language to provide content-based search and to retrieval information from formatted documents and free text. This lets you access a number of advanced text search capabilities from any SQL tool or interface.

For more information about Oracle Text, navigate to: http://otn.oracle.com/products/text/content.html.

**Oracle Human Resources**

Oracle Knowledge Management uses Oracle Human Resources to get employee data. Define or confirm the definitions of your employees in Oracle Human Resources Management System. For more information, see the *Oracle Human Resources Management Systems Implementation Guide.*

**Oracle Common Application Components**

Oracle Knowledge Management leverages the following Oracle Common Application Components:

- **Resource Manager:** You use Resource Manager in Oracle Knowledge Management to set up the various resource groups for authoring flows. The Resource Manager provides lists of resources, such as individuals, groups, and teams, for applications to access and manage their resources. Resources are employees, supplier contacts, parties, and partners that different modules use to accomplish business objectives. You can use Resource Manager to import and view resources, define resources, define roles and role types, create teams and groups, and organize resources within those teams and groups.

  For more information, see the *Oracle Common Application Components Implementation Guide*.

- **Notes**: Oracle Knowledge Management uses the Notes component to achieve the integration with service request through the Note Type to Statement Type mapping. You use the Notes component in Oracle Knowledge Management to map Statement Types to Note Types such that information from a service request can transfer to Oracle Knowledge Management for searching and creation of solutions.

  For more information, see the *Oracle Common Application Components Implementation Guide*.

- **Task Group Template**: When a user creates a solution, the user can associate task group templates to a solution.

**Oracle CRM Foundation**

Oracle CRM Technology Foundation (JTT) provides Java-based infrastructure software that is used to develop E-Business solutions such as Sales, Marketing, Service, E-Commerce, Contracts, and Interaction Center applications. It offers a common platform for developing applications with HTML, XML, and Java. The CRM Technology Foundation also provides user-friendly windows for centralized setup and administration. This Web-based interface is called the System Administrator Console. You can find the CRM User Management Framework documentation in the documentation for this group.

## Conditional Dependencies

You can set up the following Oracle E-Business Suite modules to provide additional functionality:

- Oracle Workflow, page 2- 3
- Oracle Inventory, page 2- 3

**Oracle Workflow**

Oracle Knowledge Management uses Oracle Workflow to send notifications during the solution authoring flow. For more information, see the *Oracle Workflow Guide*.

**Oracle Inventory**

Oracle Inventory provides the product and platform lists that Oracle Knowledge Management uses to categorize solutions during solution search or solution creation. For more information, see the *Oracle Inventory User's Guide*.

You must set the following profile options for selecting product and platform items from Inventory:

- Knowledge: Default Product Category Set, page B- 5
- Service: Default Platform Category Set

## Dependency Setup Checklist

The following table, Dependency Setup Checklist, *Oracle Knowledge Management Implementation Guide*, provides a suggested order for setting up the Oracle Knowledge Management dependencies. You must perform the required steps. The optional steps can be necessary if you plan to use the related features or complete certain business functions.

*Dependency Setup Checklist*

| Check | Step | Item | Required or Optional |
|-------|------|------|----------------------|
| | 1. | Install Software | Required |
| | 2. | Set up Oracle Application Foundation | Required |
| | 3. | Oracle Text | Required |
| | 4. | Oracle Human Resources | Required |
| | 5. | Oracle CRM Foundation | Required |
| | 6. | Oracle Common Application Components | Required |
| | 7. | Set up Oracle Workflow | Optional |
| | 8. | Set up Oracle Inventory | Optional |

# Installation and Dependency Verification

Before you start configuring the profile options, search for solutions, or create solutions in Oracle Knowledge Management, verify that you have completed the installation of Oracle Knowledge Management. For more information, see the *Installing Oracle Applications* document.

# Part 2

## Implementing Oracle Knowledge Management

This part of the Oracle Knowledge Management Implementation Guide contains the following chapters:

- Implementation Overview, page 3- 1
- Implementation Tasks, page 4- 1
- Customizations and Extensions, page 5- 1

# 3

# Implementation Overview

This chapter covers the following topics:

- About Implementation
- Access Control
- Job Roles and Process Flows
- Implementation Tasks

## About Implementation

This chapter provides an overview of how to access Oracle Knowledge Management, the associated job roles and process flows, and a summary of the implementation tasks.

## Access Control

In Oracle Knowledge Management, function and menu security control user access to the agent pages. The following sections discuss the setup of these security features.

Roles and permission control customer pages. For a list of permission that control Oracle Knowledge Management page access, see Roles and Permission, page A- 1 . For related information, see the *Oracle iSupport Implementation and User Guide*.

Topics in this section include:

- About Read and Write Access Controls, page 3- 1
- Set Up Function Security and Menu Security, page 3- 2
- Menus, page 3- 4
- Functions, page 3- 5

### About Read and Write Access Controls

**Read Access Controls**

Users can access Oracle Knowledge Management when:

- The user's assigned Visibility is more restrictive than the data Visibility level.
- A category belongs to the assigned Category Security Group and the category is visible.
- A solution belongs to an accessible category and the solution is visible.

- A statement belongs to an accessible solution and the statement is visible.

**Write Access Controls**

Solution Security has the following write-access controls:

- When submitting a solution for approval, a user can only submit to flows associated with one's own Category Security Group.

- On top of the resource group checking, a user can only lock and update a solution if the solution is accessible and the user can see all the statements of the solution. If security setup changes and causes the loss of read-write access to locked solutions, a concurrent program can unlock the "stuck" solutions for other users to work on.

## Set Up Function Security and Menu Security

You can use **function security** to restrict user access to certain functions and actions in agent pages in Oracle Knowledge Management. An administrator also has the option of setting **menu security**. Menu security is a security setting that prevents user access to entire menus and submenus within Oracle Knowledge Management. You define both function security and menu security attributes at the Responsibility level.

For more information, see the *Oracle Applications System Administrator's Guide*.

The following table, page 3- 3 shows responsibilities, menus, and tabs that pertain to internal, agent Oracle Knowledge Management users. For customer-facing users, see the *Oracle iSupport Implementation and User Guide*.

*Responsibilities, Menus, and Tabs for Internal Users*

| Responsibility | Functional Role | Description | Menus | Tabs | Subtabs |
|---|---|---|---|---|---|
| CS_KB_SYS_ ADMIN | Knowledge Administrator | Sets up Oracle Knowledge Management system, such as knowledge base structure, security, and authoring flows for Oracle Knowledge Management users. | CS_KB_TOP_ MENU | Knowledge, Authoring, and Setup | Knowledge: Search, Statements. Authoring: Solutions in Progress, Recommended Solutions, Subscriptions. Setup: Categories, Security, Visibilities, Authoring Flows, Solution Types, Statement Types, Create Type, Frequently Used Definitions. |
| CS_KB_ KNOWLEDGE_ WORKER | Knowledge Worker | Creates, edits, and reviews technical information in Oracle Knowledge Management. | CS_KB_TOP_ KW_MENU | Knowledge, Authoring | Knowledge: Search, Statements. Authoring: Solutions in Progress, Recommended Solutions, Subscriptions. |
| CS_KB_ AGENT | Customer Service Agent | Interfaces with customers to record their problems and provides them existing solutions or creates new solutions. | **Note**: The Responsibility for agent can be the Responsibility of the applications that integrate with Oracle Knowledge Management, such as Service Agent, or Depot Repair User. | CS_KB_TOP_ AG_MENU | Knowledge: Authoring Knowledge: Search. Authoring: Solutions in Progress, Subscriptions |

**About Accessing Agent Pages**

To access agent pages, use the Self-Service login (for example, PHP) instead of jtflogin.jsp.

Oracle Knowledge Management responsibilities must be of type **Self-Service**. Otherwise, jinitiator invokes when you start Oracle Knowledge Management.

## Menus

Oracle Knowledge Management has the following types of menus:

- **Responsibility**: Menus that are attached to the Responsibility setup.

- **Navigation**: Controls the tabs and subtabs that you see as you navigate in Oracle Knowledge Management.

- **Security**: Controls the list of functions that you can access.

The following table, page 3- 4  shows a list of menus for Oracle Knowledge Management.

*Oracle Knowledge Management Menus*

| System Name | Menu | Description |
| --- | --- | --- |
| CS_KB_TOP_MENU | Knowledge Admin Root Menu | Responsibility menu for Oracle Knowledge Management Admin Responsibility |
| CS_KB_TOP_KW_MENU | Knowledge Worker Root Menu | Responsibility menu for Oracle Knowledge Management Knowledge Worker Responsibility |
| CS_KB_TOP_AG_MENU | Knowledge Agent Root Menu | Responsibility menu for Oracle Knowledge Management Agent Responsibility |
| CS_KB_HOMEPAGE | KM Home Page | Navigation menu for Oracle Knowledge Management |
| CS_KB_KNOWLEDGE_TAB | KM Knowledge Tab | Navigation menu for Knowledge tab |
| CS_KB_AUTHORING_TAB | KM Authoring Tab | Navigation menu for Authoring tab |
| CS_KB_ADMIN_TAB | KM Administration Tab | Navigation menu for Setup tab |
| CS_KB_SMS_MENU | KM Administrator Security Menu | Security menu for Oracle Knowledge Management Admin |
| CS_KB_SMS_KW_MENU | KM Knowledge Worker Security Menu | Security menu for Oracle Knowledge Management Knowledge Worker |

| System Name | Menu | Description |
|---|---|---|
| CS_KB_SMS_AG_MENU | KM Agent Security Menu | Security menu for Oracle Knowledge Management Agent |
| CS_KB_SMS_SEARCH_AG_ MENU | KM Knowledge Security Menu | Security menu for Knowledge tab |
| CS_KB_UNISRCH_GRANT | KM Unified Search Security Menu | Security menu for Simple Search |
| CS_KB_VIEW_GRANT | KM View Solution and Statement Security Menu | Security menu for Solution and Statement Details |
| CS_KB_ADVSRCH_GRANT | KM Advanced Search Security Menu | Security menu for Advanced Solution Search |
| CS_KB_STMT_SRCH_ GRANT | KM Statement Search Security Menu | Security menu for Statement Search |
| CS_KB_SMS_SOLUTION_ KW_AG_MENU | KM Authoring Security Menu | Security menu for Authoring tab |
| CS_KB_WIP_GRANT | KM In Progress Solution Security Menu | Security menu for Solutions in Progress |
| CS_KB_SOLUTION_ CREATE_GRANT | KM Create or Update Solution Security Menu | Security menu for Create/ Update Solution |
| CS_KB_STMT_CREATE_ GRANT | KM Create or Update Statement Security Menu | Security menu for Create/ Update Statement |
| CS_KB_REC_SOLN_GRANT | KM Recommended Solutions Security Menu | Security menu for Recommended Solution Setup |
| CS_KB_SMS_SETUP_MENU | KM Admin Setup Security Menu | Security menu for Setup tab |
| CS_KB_CATEGORY_SETUP_ GRANT | KM Category Setup Security Menu | Security menu for Category Setup |
| CS_KB_CAT_GRP_SETUP_ GRANT | KM Category Group Setup Security Menu | Security menu for Category Security Group Setup |
| CS_KB_VIS_SETUP_GRANT | KM Visibility Setup Security Menu | Security menu for Visibility Setup |

## Functions

For example, if you have defined your own menu for your own Responsibility, and you would like to allow the user to access Oracle Knowledge Management, you can include **KM Agent Security Menu** as a submenu of your new menu such that users who have this new Responsibility can perform activities that Oracle Knowledge Management agents have.

The following table, page 3- 6 shows the functions that you can use to establish function security in Oracle Knowledge Management.

***Oracle Knowledge Management Functions***

| System Name | Menu | Description |
| --- | --- | --- |
| CS_KB_SMS_SOLN_ ASEARCH_FN | CS_KB_SMS_SOLN_ ASEARCH_FN | Controls access to Advanced Solution Search. |
| CS_KB_SMS_SOLN_AUD ITCREATE_FN | CS_KB_SMS_SOLN_AUD ITCREATE_FN | Controls access to Create Solution button. |
| CS_KB_GET_LOCK_FN | CS_KB_GET_LOCK_FN | Controls access to Get Lock button. |
| CS_KB_GLOBAL_UPDATE_ FN | CS_KB_GLOBAL_UPDATE_ FN | Controls access to Update button from Statement Search. |
| CS_KB_REC_SOL_ADD_FN | CS_KB_REC_SOL_ADD_FN | Controls access to update Recommended Solutions. |
| CS_KB_CATEGORY_DETA IL_FN | CS_KB_CATEGORY_DETA IL_FN | Controls access to update Category. |

If you do not want to grant certain functions to a particular Responsibility, you can exclude the functions from that Responsibility. For more information, see *Oracle Applications System Administrator's Guide*.

# Job Roles and Process Flows

Topics in this section include:

- About Process Flows and Associated Job Roles, page 3- 6
- Knowledge Administrator Flows, page 3- 8
- Knowledge Worker Flows, page 3-11

## About Process Flows and Associated Job Roles

The process flows that this section describes provide you with a general, high-level understanding of the tasks that Knowledge Administrators, Knowledge Workers, and end users perform in Oracle Knowledge Management. For detailed information on performing these tasks, see the *Oracle Knowledge Management User's Guide*.

The following table, page 3- 7 provides a cross reference of the process flows and the associated job roles.

> **Note:** Customer Service Agents perform many of the same tasks in Oracle Knowledge Management as Knowledge Workers, but typically have a more limited scope in the Solution Authoring process.

*Job Roles and Process Flows Matrix*

| Process Flows | Knowledge Administrator Flows, page 3-8 | Knowledge Worker Flows, page 3-11 | Customer Service Agent | End User Flows, page 8-4 |
|---|---|---|---|---|
| Create Authoring Flows, page 3-10 | YES | NO | NO | NO |
| Manage the Knowledge Base Structure, page 3-8 | YES | NO | NO | NO |
| Create Top Solutions for Oracle , page 3-18 | YES | YES | NO | NO |
| Authoring Solutions, page 3-12 | YES | YES | YES | NO |
| Reviewing Solutions in Progress, page 3-13 | YES | YES | NO | NO |
| Update a Solution, page 3-15 | YES | YES | YES | NO |
| Search the Knowledge Base, page 3-17 | - | - | - | - |
| Conducting a Simple Search, page 8-5 | YES | YES | YES | YES |
| Browse Solution Categories, page 8-5 | YES | YES | YES | YES |
| Conducting an Advanced Solution Search | YES | YES | YES | YES |
| Searching for Statements | YES | YES | NO | NO |
| View Top Solutions in Oracle iSupport, page 8-6 | NO | NO | NO | YES |

# Knowledge Administrator Flows

The flows that appear in this section are primary responsibilities of the Knowledge Administrator. The primary functions that Knowledge Administrators perform in Oracle Knowledge Management include:

- Manage the Knowledge Base Structure, page 3- 8

- Set Up Category Security Group, page 3-10

- Create Authoring Flows, page 3-10

- Create Top Solutions for Oracle iSupport Users, page 3-18

> **Note:** Knowledge Administrators also perform some of the processes associated in this chapter with Knowledge Workers and end users. For a more complete listing of the tasks that a Knowledge Administrator can perform, see the Job Roles and Process Flows Matrix, page 3- 7  table.

### Manage the Knowledge Base Structure

The knowledge base structure provides the basis for partitioning information in the knowledge base. Its main components are Solution Types, Statement Types, and Solution Categories. The following flow diagrams show the tasks that you perform to set up the knowledge base structure.

> **Note:** Designing the knowledge base structure is a very important aspect of implementing Oracle Knowledge Management. After adding solutions to the Solution Categories, it is difficult to change the knowledge base structure.

### Set Up Solution Types and Statement Types

Solution Types and Statement Types provide a structure for organizing the type of information that comprises solutions and statements in the knowledge base. The following figure is a flow diagram that shows the parallels in creating and maintaining Solution Types and Statement Types.

*Setting Up the Solution Types and Statement Types*
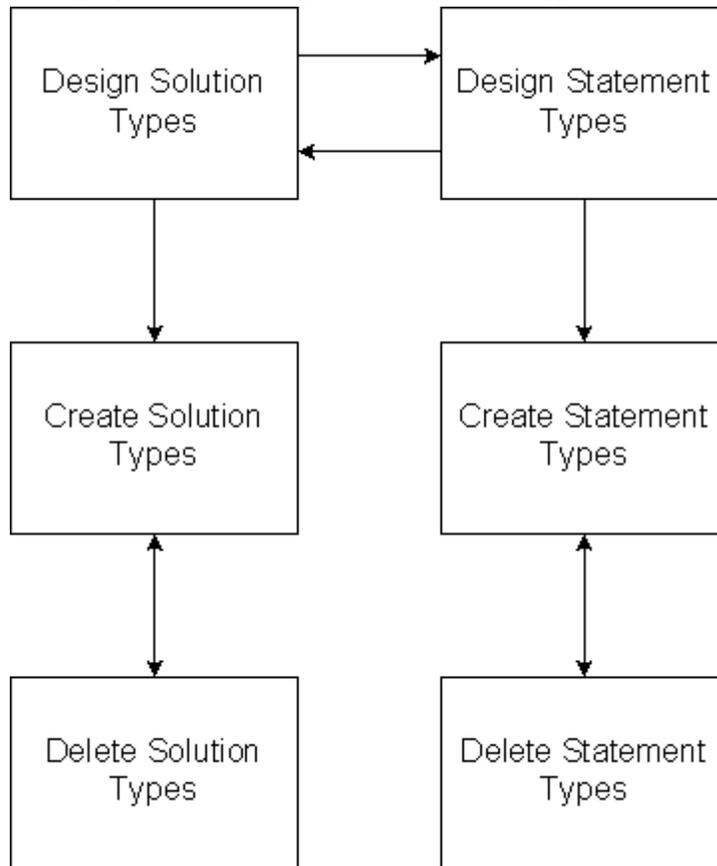


Although you create Solution Types and Statement Types separately, both are interrelated. You should design them in conjunction with the other:

- **Design Solution Types**: Determine the number of Solution Types that you need and the Statement Types that each Solution Type includes.

- **Design Statement Types**: Determine the number of Statement Types and a description of the content that comprises the Statement Type.

When the Knowledge Administrator designs the Solution Types and Statement Types, he or she must create the actual structures:

- **Create Solution Types**: Add Solution Types to knowledge base. You must associate at least one Statement Type to a Solution Type.

- **Create Statement Types**: Add Statement Types to the knowledge base.

To manage the knowledge base, the Knowledge Administrator must also know how to:

- **Delete a Solution Type**: Delete a Solution Type from the knowledge base. You cannot delete a Solution Type if solutions are associated with the Solution Type.

- **Delete a Statement Type**: Delete a Statement Type from the knowledge base. You cannot delete a Statement Type that is associated with a solution in the knowledge base.

**Note:** Solution Types and Statement Types are interrelated. Deleting these structures is not a common task in managing the knowledge base.

**Note:** You can end-date Solutions Types when a Solution Type becomes obsolete or is no longer valid. End-dating the type becomes effective on the date that the Knowledge Administrator specified. When a Solution Type has been end-dated, no one can create new solutions of that type. However, solutions of that type remain in the knowledge base, and users can search and edit them.

**Note:** You can end-date Statement Types when an associated Solution Type is end-dated. You cannot end-date the Statement Type if relationships with other Solution Types are still valid.

**Note:** When a Solution Type or Statement Type has been end-dated, you cannot use that type in your search criteria.

### Set Up Solution Categories

Solution Categories are folders that you use to sort solutions into logical groupings. The following figure shows a flow diagram of designing, creating, and deleting Solution Categories.

*Setting Up Solution Categories*



Setting up and maintaining Solution Categories involves:

- **Designing Solution Categories**: Determine how many Solution Categories, the names of the Solution Categories, and the category hierarchy.

- **Creating Solution Categories**: Create Solution Categories.

- **Deleting Solution Categories**: Delete a Solution Category from the knowledge base. You cannot delete a Solution Category that has an associated solution.

### Set Up Category Security Group

Category Security Groups are defined views of categories that determine whether or not a particular user can access a category, solution, and statement. Category Security Groups are subsets of the master category hierarchy and represent subject areas. After you define the master category hierarchy, you must also define the views--the Category Security Groups--of the master category hierarchy.

For more information, see the **Managing Security** chapter in the *Oracle Knowledge Management User's Guide*.

### Create Authoring Flows

You use authoring flows to automate the review and publication of solutions in the knowledge base. Knowledge administrators create authoring flows. The following figure shows the process to create authoring flows:

*Creating Authoring Flows*
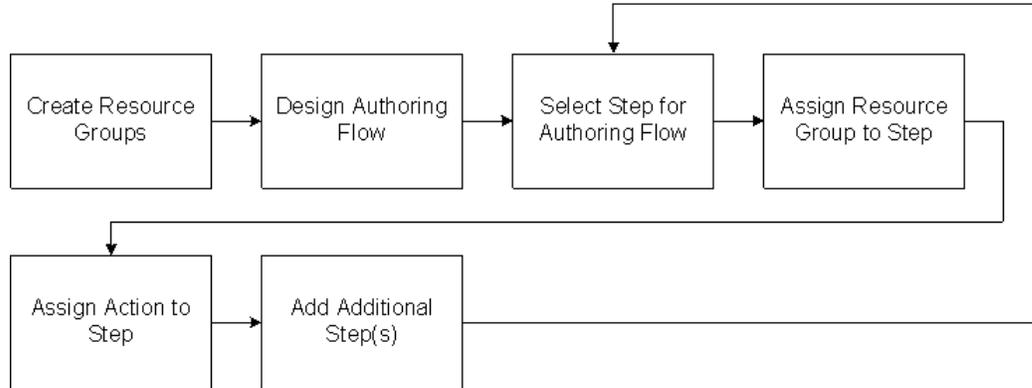


Creating an authoring flow includes:

- **Creating resource groups**: Create groups of users whom you can assign to steps within the authoring flow process. For example, you can create a group called Editorial Reviewers, who are responsible for performing editorial reviews of solutions.

- **Designing authoring flow**: Specify the number of steps, their order within the authoring flow, the resource group associated with each step, and the action that follows each step. Before designing an authoring flow, it is important to understand which review steps and actions from which you can choose.

- **Specifying the step for authoring flow**: Add steps to the authoring flow, for example, Editorial Review.

- **Assigning action to step**: Assign an action to the step, for example, Publish.

- **Assigning resource group to step**: Assign the group that is responsible for performing a particular step within the authoring flow.

- **Specifying additional step**: Add as many steps as you need to construct the authoring flow.

## Knowledge Worker Flows

The primary tasks that Knowledge Workers perform in Oracle Knowledge Management include:

- Authoring Solutions, page 3-12

- Reviewing Solutions in Progress, page 3-13

- Update a Solution, page 3-15

- Search the Knowledge Base, page 3-17

- Create Top Solutions for Oracle iSupport Users, page 3-18

> **Note:** Knowledge Workers also perform some of the processes associated in this chapter with Knowledge Administrators and end

users. For a more complete listing of the tasks that a Knowledge Administrator can perform, see the Job Roles and Process Flows Matrix, page 3- 7  table.

**Note:** The flows that appear in this section are the primary responsibilities of the Knowledge Worker.

**Authoring Solutions**

Solutions are the cornerstone of the knowledge base. Knowledge Workers are generally responsible for managing content in the knowledge base.

The following figure shows the tasks that you use to create a solution.

*Authoring a Solution*
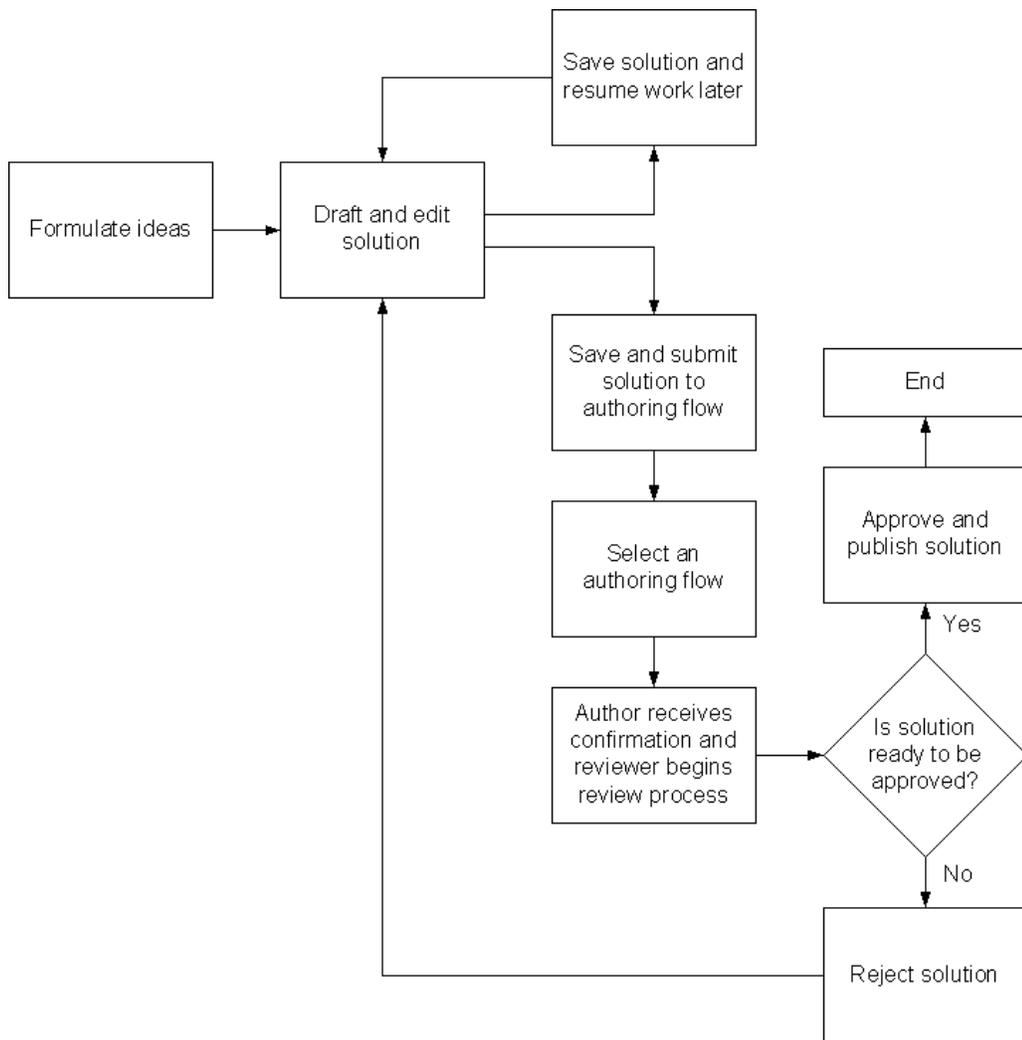


The tasks to consider for authoring solutions include:

- **Formulate ideas**: Determine the solutions that you need to create.

- **Draft and edit solutions**: Create the solution content and assign associated attributes to create a solution in Oracle Knowledge Management. You can review solutions on which you are currently working and have saved from the Solutions in Progress page.

- **Save solution and resume work later**: Save the solution so that you can work on it later.

- **Save solution and submit solution to authoring flow**.

- **Select an authoring flow**: Submit the solution to an authoring flow where participants review and edit the solution.

- **Author receives confirmation and reviewer begins review process**: Review confirmation that the solution has been submitted to a step within one of the authoring flows. You can review the status of the solution on the confirmation page. For example, if you submit the solution to the initial draft or authoring step in an authoring flow, the status indicates the step that the solution has been submitted to.

- **Is solution ready to be approved?** Verify approval of solution at each step of the authoring flow. Members of the resource groups, who have been assigned to each step in the authoring flow, review and approve solutions.

- **Track publishing of solution**: The resource group who has been assigned to the step before Publishing determine when a solution is ready for publishing.

- **Track rejection of solution**: Solution is rejected and returned to the author for modification. The solution must be saved and submitted again.

> **Note:** Knowledge Workers may also need to obsolete a solution in the knowledge base during the solution lifecycle.

### Reviewing Solutions in Progress

A critical Responsibility of a Knowledge Worker is authoring and reviewing solutions. The following figure shows that tasks that are associated with reviewing a solution.

*Reviewing Solutions in Progress*
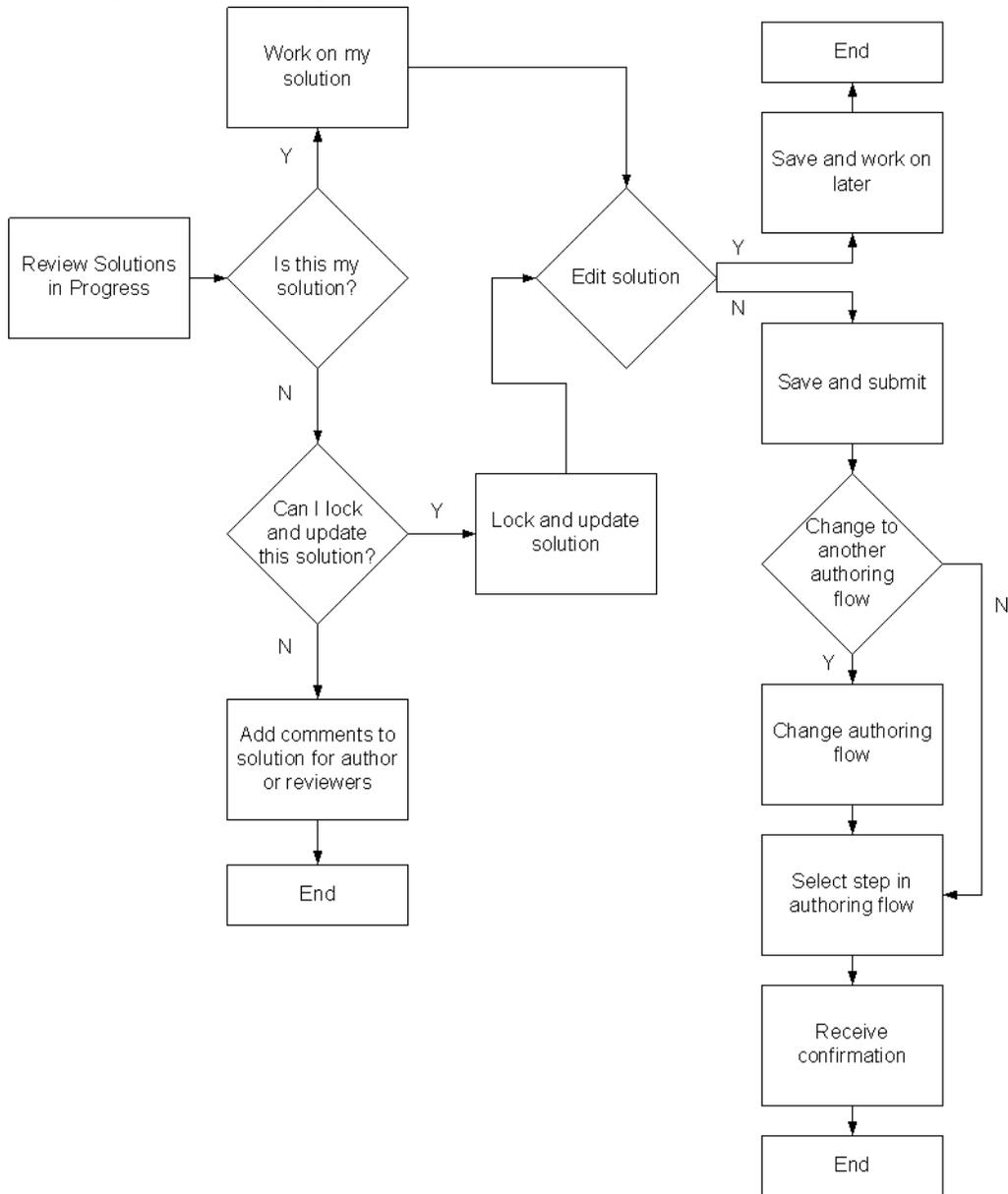
The tasks to review a solution include:

- **Review Solutions in Progress**: Review the Solutions in Progress tab to see a list of solutions that are currently being authored. Views include **Solutions that I am currently working on**, **Other Solutions that I can** lock and update, and **All solutions in progress**.

- **Determine if this is a solution that you have drafted or locked**: You can view the solutions that you are currently working on by choosing the **View solutions that I'm currently working on** view from the Solutions in Progress page.

- **Work on my solution**: Modify or update a solution on which you are currently working.

- **Lock and update the solution**: Determine whether you have proper permission and whether you can approve the solution that someone else has authored.

- **Add comments to solution for author or reviewers**: If you cannot lock and update the solution, you can add comments for viewing by other reviewers. These comments are not published.

    **Note:** You can also add comments to a solution that you are editing.

- **Lock and update the solution**: Lock and update the solution for editing. This option locks the solution, so that no other Knowledge Workers can lock and update the solution while you have it checked out.

- **Edit the solution**: Modify the solution. You must have sufficient permission to edit a solution.

- **Save and resume work later**: Save the solution so that you can work on it later.

- **Save and submit the solution to** authoring flow: Save changes and submit the solutions to a step or status in the authoring flow, for example, Publish. This step checks the solution back in so that other Knowledge Workers can lock and update the solution.

    The Searches in the Knowledge Base, page 3-17 table summarizes the flow for viewing a Solution in Progress that has not already been published. For solutions that have been published and have subsequently been checked out, the system prompts the user to select an authoring flow after clicking the Save and Submit button rather than selecting a step in the current flow.

- **Change authoring flow**: Determine whether you want to submit the solution to a new authoring flow.

    The Knowledge: Select Authoring Flow profile option must be **Yes** for you to have the ability to select an authoring flow. Otherwise, the system submits the solution to the default authoring flow.

- **Select a step in** authoring flow: Select a step or status in the authoring flow, for example, Publish.

    An updated solution can be rejected and returned to the author by changing the solution to the initial Draft or **Authoring** status.

- **Receive confirmation**: Review confirmation that the solution has been submitted to a step within one of the authoring flows. You can review the status of the solution on this confirmation page. For example, if you submit the solution to the initial **Draft** or **Authoring** step in an authoring flow, the status indicates that the solution has been **Rejected to Author**.

**Update a Solution**

Knowledge Workers can also update an existing or published solution. The Updating an Existing Solution, page 3-16 figure shows tasks that you perform to update an existing solution.

***Updating an Existing Solution***
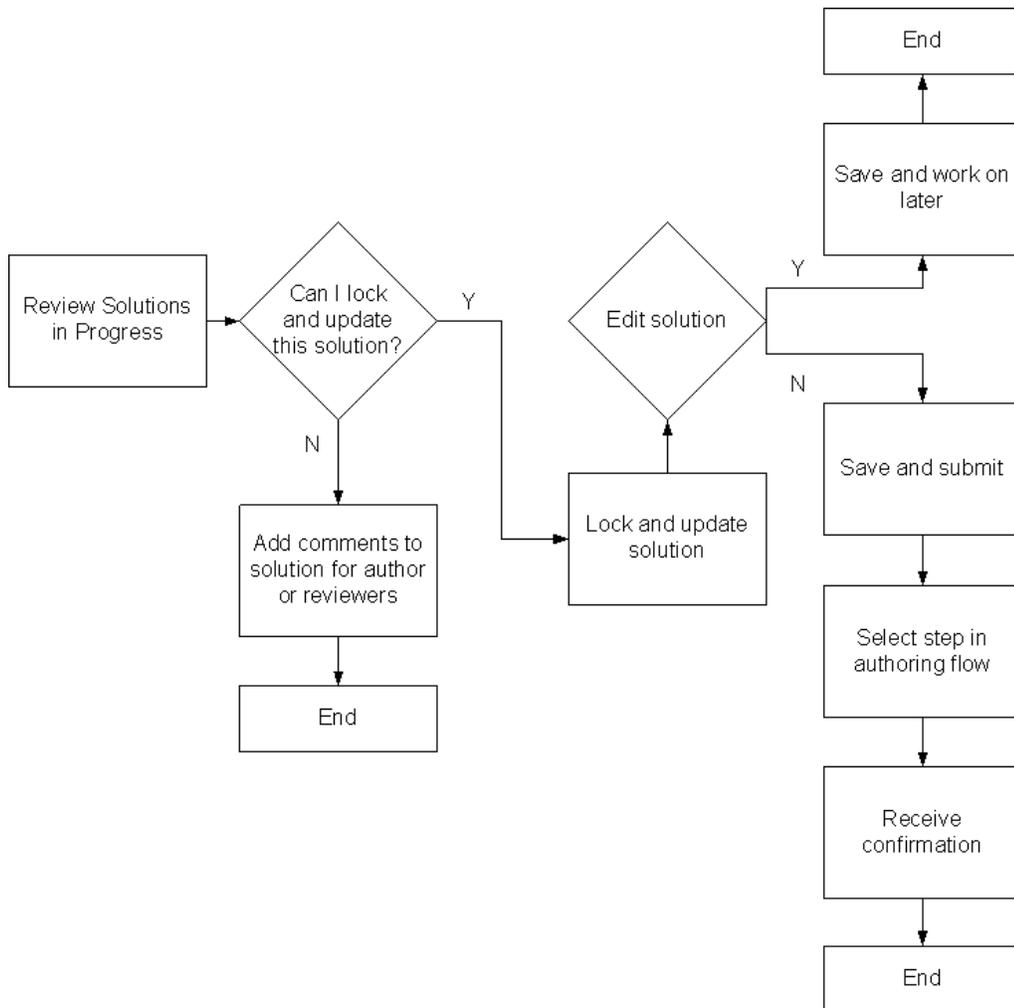


Updating an existing solution includes:

- **Reviewing published solutions**: Search for and review a published solution.

- **Determining whether or not you have proper permission**: You need permission to lock and update a solution and edit it.

- **Adding comments to solution for reviewers**: If you cannot lock and update the solution, you can add comments for viewing by other reviewers. These comments are not published.

  > **Note:** You can also add comments to a solution that you are editing.

- **Locking a solution**: Determine whether you have proper permission and whether you can approve the solution that someone else has authored.

- **Editing a solution**: Modify the solution.

- **Saving and resuming work later**: Save the solution so that you can work on it later.

- **Saving and submitting solution to** authoring flow: Save changes and submit the solutions to a step or status in the authoring flow, for example, **Publish**. This step checks-in the solution so that other Knowledge Workers can lock and update the solution.

- **Selecting an authoring flow**: Select an authoring flow to submit the edited solution for review.

> **Note:** The **Knowledge: Select Authoring Flow** profile option must be **Yes** for you to have the ability to select an authoring flow. Otherwise, the solution is submitted to the default authoring flow.

- **Receiving confirmation**: Review confirmation that the solution has been submitted to an authoring flow. You can see which flow to which the solution has been submitted by verifying the status that appears on the confirmation.

### Search the Knowledge Base

Knowledge Workers frequently must search the knowledge base to maintain its relevancy. As part of this process, the Knowledge Worker must determine the search criteria and subject matter and which type of search to conduct. Oracle Knowledge Management offers several ways to search the knowledge base.

> **Note:** All users of Oracle Knowledge Management perform at least a subset of these search functions.

The following table, page 3-17 shows the types of searches, the usage, and the objectives or results that are available in Oracle Knowledge Management.

*Searches in the Knowledge Base*

| Search Type | Usage | Objectives or Results |
| --- | --- | --- |
| Perform a Simple Search | Knowledge Administrator<br>Knowledge Worker<br>Customer Service Agent<br>End User | Key Word<br>Published Solutions<br>Forums<br>Multiple Repositories<br>Service Requests |
| Perform an Advanced Solution Search | Knowledge Administrator<br>End User<br>Knowledge Worker<br>Customer Service Agent | Related Statements<br>Matching Statements<br>Ability to Add Filters<br>Published Solutions |
| Search Solutions in Progress | Knowledge Worker | Solutions in Progress |
| Search for Statements | Knowledge Administrator<br>Knowledge Worker | Published Statements |

You can search the knowledge base using different search criteria:

- **Simple Search**: Simple Search lets you enter key words to perform a search for solutions across multiple repositories within the knowledge base. By default, Solutions, Forums, Categories, and Service Requests are the repositories that are available for search.

  The Simple Search performs a key word search of the solution title, solution number, statement title, and statement description. For categories, a key word search occurs across the title. For forums, a key word search occurs across the message subject, message body, and message number.

  From the Simple Search page you can also browse Solution Categories. Solution Categories are a way to organize the knowledge base. Solution Categories let you navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base.

- **Advanced Solution Search**: Advanced Solution Search lets you search for solutions that meet specific user-defined criteria. This is a more comprehensive search that lets you set conditions and filters and incorporate similar and identical statements into your search. Solutions consist of statements. The Advanced Solution Search allows users to find solutions using statements as the search criteria. The Advanced Solution Search can search similar statements or solutions based on a statement. From a given statement, users can find any other solution that uses this statement.

- **Solutions in Progress**: Solutions in Progress is a search that searches draft solutions or solutions that are not yet published. This search functionality is not available to calling applications directly, although users accessing from calling applications can navigate to this page by choosing from the menu. You can view or search Solutions in Progress from the Solutions in Progress page. In addition to solutions that have not been approved for publishing, Solutions In Progress includes saved solutions that have not been submitted for approval.

- **Statement Search**: By searching for a statement, you can find the related solutions containing that statement. Typically, only Knowledge Workers and Knowledge Administrators use this process. This process is a useful way to find statements using statement numbers. The Knowledge Administrator can use this search to find a statement to perform a global update while the Knowledge Worker can only use this page to find a statement. In most cases, it is more useful to search for statements in conjunction with the Advanced Solution Search page rather than using the Search Statements page.

## Create Top Solutions for Oracle iSupport Users

Knowledge Workers can designate certain solutions as **Recommended**. Recommended solutions are a list of particularly worthy or desirable solutions for users to view. For example, solutions that are on this list may include fixes for a recently discovered product problem. Users who navigate to the Top Solutions tab in Oracle iSupport can view a listing of Recommended Solutions as well as a list of Frequently Used Solutions. Frequently Used Solutions is a separate list of solutions based on usage counts.
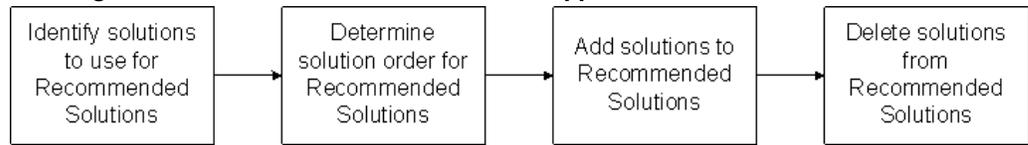
### Top Solutions: Recommended Solutions List

The Recommended Solutions list shows solutions that the Knowledge Worker chose to show in Oracle iSupport.

> **Note:** A Knowledge Worker--not a Knowledge Administrator--often adds Recommended Solutions.

The following figure and the following list show or describe the tasks that a Knowledge Worker performs to manage the lists on the Top Solutions tab.

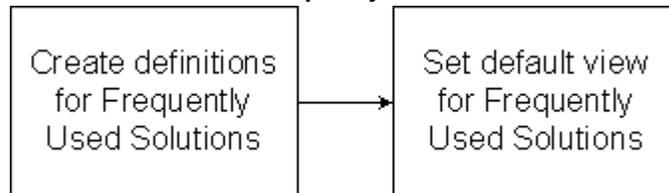*Creating Recommended Solutions for Oracle iSupport Users*



- **Identify solutions to use for Recommended Solutions list**: Identify how many and which solutions to include on the Recommended Solutions list. This can involve working with Knowledge Workers to determine the solutions that are most useful to users.

- **Determine solution order for Recommended Solutions list**: Determine the sequence in which the solutions appear in Oracle iSupport.

- **Add solutions to the Recommended Solutions list**: Add the solutions to the Recommended Solutions lists. You set up the list Oracle Knowledge Management. The list appears in Oracle iSupport.

- **Delete Solutions from the Recommended Solutions list**: Delete solutions as part of an ongoing maintenance of the Recommended Solutions list.

**Top Solutions: Frequently Used Solutions List**

The Frequently Used Solutions list is based on usage counts. You can change the view for these counts by specifying a new date range from a list. You specify and create these date ranges or definitions in Oracle Knowledge Management. In addition, you specify the default view or date range in Oracle Knowledge Management.

The following figure is a flow diagram that shows the sequence of creating definitions for Frequently Used Solutions for Oracle iSupport users.

*Create Definitions for Frequently Used Solutions for Oracle iSupport*



Creating definitions for Frequently Used Solutions for Oracle iSupport Users includes:

- **Creating definitions for Frequently Used Solutions**: Specify date ranges, such as **within the last year**, that appear in the Frequently Used Solutions list. This list controls the date range of the frequently used solutions.

- **Setting the default view for Frequently Used Solutions**: Specify the date range or definition that you would like to use as the default view for the Frequently Used Solutions list.

# Implementation Tasks

The following table, page 3-20 shows the setup steps that you must complete to implement Oracle Knowledge Management. These steps are in addition to Installation and Dependency Verification, page 2- 4 .

*Implementation Tasks*

| Task | Reference | Mandatory or Optional | Setup |
|------|-----------|----------------------|-------|
| Prerequisites or Implement Mandatory Dependencies | Before You Begin, page 2- 1 | Mandatory | Forms |
| Create Users and Resource Groups | Create Users and Resource Groups, page 4- 1 | Mandatory | Forms |
| Set Up Security | Set Up Security, page 4- 5 | Mandatory | Oracle Knowledge Management |
| Set Up Knowledge Base Structure | Set Up the Knowledge Base Structure, page 4- 6 | Mandatory | Oracle Knowledge Management |
| Set Up Authoring Flows | Set Up Authoring Flows, page 4- 3 | Mandatory | Oracle Knowledge Management |
| Set Profile Options | Set Profile Options, page 4- 9 | Optional | Forms |
| Additional Steps | Additional Integration Setups, page 8- 8 | Optional | Forms or Oracle Knowledge Management |
| Set Up Concurrent Programs | Set Up Concurrent Programs, page 4- 8 | Mandatory | Forms |
| Import Solutions | Import Solutions, page 4- 9 | Optional | Forms |
| Set Up Top Solutions for Oracle iSupport Users | Set Up Top Solutions for Oracle iSupport Users, page 4-10 | Optional **Note:** You must have either added or imported solutions into the knowledge base to perform this setup. | Oracle Knowledge Management |

# 4

# Implementation Tasks

This chapter covers the following topics:

- About this Chapter
- Prerequisites and Mandatory Dependencies
- Create Users and Resource Groups
- Set Up Authoring Flows
- Set Up Security
- Set Up the Knowledge Base Structure
- Set Up Concurrent Programs
- Set Profile Options
- Import Solutions
- Set Up Top Solutions for Oracle iSupport Users
- Set Up Note Token Rules
- Upgrade Considerations
- Performance Considerations

## About this Chapter

This chapter includes the required implementation tasks to set up Oracle Knowledge Management.

## Prerequisites and Mandatory Dependencies

For a list of prerequisite and mandatory dependencies see Before You Begin, page 2- 1 .

## Create Users and Resource Groups

The System Administrator creates users for Oracle Knowledge Management, including the Knowledge Administrator. Subsequently, the Knowledge Administrator must create resource groups which are required for automating the authoring flow life cycle. To create a resource group you must:

1. Create a user.

2. Associate a user with an employee.

3. Create a resource for an employee.

4. Create a resource group.

Following are details on how to create a Knowledge Administrator and how to create a resource group:

- Create a Knowledge Administrator, page 4- 2

- Create a Resource Group, page 4- 3

## Create a Knowledge Administrator

The System Administrator assigns the Knowledge Administrator Responsibility--CS_KB_SYS_ADMIN--to a user who performs setups and maintenance for Oracle Knowledge Management.

The System Administrator should also assign the CS_SYSTEM_ADMIN role to the Knowledge Administrator user.

**Login**

Oracle Forms module

**Responsibility**

System Administrator

**Prerequisites**

None

**Navigation**

Security > User > Define...Users form

**Steps**

1. In the Users form, enter the **username** for the Knowledge Administrator.

   **Example**: KMADMIN

2. To associate the user with an employee:

   1. Click the **Person** field to display the **Person Names** list.

   2. Search for and choose the appropriate employee.

3. To create a password for the new user:

   1. In the **Password** field, enter a password for the new user.

   2. Use the **Tab** key to clear the field and re-enter the same password to validate.

4. In the **Responsibilities** area, search for and choose the **CS_KB_SYS_ADMIN** Responsibility.

5. **Save** your work.

# Set Up Authoring Flows

To automate the solution authoring process, you must set up authoring flows in Oracle Knowledge Management. Each authoring flow consists of a series of steps that a member of an assigned resource group must complete before publishing a solution.

> **Note:** You must associate the authoring flow to a Category Security Group before you can use the authoring flows.

*Example: Authoring Flow Example*

A health and fitness equipment manufacturer company creates an authoring flow that requires all solutions in the knowledge base to have an editorial review and marketing approval prior to publication. In addition, the company would like to ensure that the legal review team has final authority on publication of a solution. To ensure that the proper controls are in place, the company sets up steps in the authoring flow and associates a unique resource group to each step. The following table, page 4- 3 shows the steps and assigned resource groups.

*Authoring Flow Example*

| Authoring Flow Step Name | Resource Group Assigned |
| --- | --- |
| Format and Edit Review | Editorial_Reviewers |
| Marketing Approval | Marketing_Approval |
| Publish | Legal_Reviewers |

For information on setting up authoring flows see the *Oracle Knowledge Management User's Guide*.

# Create a Resource Group

To automate the solution authoring process, you must set up authoring flows in Oracle Knowledge Management. Each authoring flow consists of a series of steps that a member of an assigned resource group must complete before publishing of a solution can occur. A resource group can include one or more users. To create a resource group, you must first create a user, associate that user with an employee, and create a resource for an employee.

*Example: Resource Group Example*

A software company creates an authoring flow that requires all solutions to have a technical review and an editorial review prior to publication. To ensure that the proper controls are in place, the company sets up the following resource groups:

• **Technical_Reviewers**: Responsible for technical accuracy of a solution.

• **Editorial_Reviewers**: Responsible for formatting and editing content.

• **Solution_Publishers**: Responsible for providing final review and approval prior to publication.

The following procedures describe how to create a resource for an employee or party.

**Login**

Oracle Applications Forms

**Responsibility**

System Administrator

**Prerequisites**

None

**Navigation**

Responsibilities window

**Steps**

1. Switch the Responsibility to the CRM Resource Manager.

2. Navigate to Maintain Resources > Import Resources.

   The Selection Criterion window opens.

3. In the Resource Category field, choose an employee from the list.

4. Enter the employee name or employee number to narrow search criteria.

5. Click Search.

   The Search Results section shows the matching results.

6. Click Create Resource.

   The Default Values window opens.

7. Enter mandatory and other information and click OK.

   The Selected Resources window appears.

8. Click Save Resource.

9. To create a resource group:

   1. Switch the Responsibility to the CRM Resource Manager Responsibility.

   2. Navigate to Maintain Resources > Groups. The Define Groups window opens.

      > **Note:** If a group is not available, you must create a group by entering a group name in the Define Groups window. Click Save.

   3. Enter the group name.

   4. On the Members tab, enter the names of the employees that you want in the group.

   5. Navigate to the Usages tab and click Oracle iSupport.

   6. Save the record.

      > **Note:** You can set up employee resources and resource groups in HTML. For information on creating employee resources and resource groups in HTML, see the *Oracle Common Application Components Implementation Guide*.

# Set Up Security

The following sections guide you through setting up Security:

- Define Visibility, page 4-5
- Define Categories, page 4-5
- Define Category Security Groups, page 4-6
- Associate Categories with Category Security Groups, page 4-6
- Associate Authoring Flows with Category Security Groups, page 4-6

## Define Visibility

The sensitivity or Visibility of a categories, solutions, and statements is a factor that determines whether or not a particular user can access a category, solution, and statement. The **Visibility level** is a reflection of the confidentiality or sensitivity of the category, solution, and statement.

Visibilities:

- Restrict certain users from viewing secure or sensitive information.
- Control the level of access a user has to a category, a solution, or a particular statement within a solution.

You define Visibilities on a linear scale, from the most sensitive--such as highly secure or Internal--to the least sensitive--such as low security or External. Visibility levels for categories and solutions are extensible. You should plan and define Visibility levels at implementation time. For statements, Visibility levels are limited to Internal and External. Users assign Visibility levels to data--such as categories, solutions, and statements--when they create the data.

Users are assigned a Visibility level through a **mandatory** profile option, **Knowledge: Assigned Visibility Level**. A user who has a particular Visibility level has access to all data that has that same or less secure level. You can set the profile option at the Site, Application, or Responsibility levels. The **Knowledge: Assigned Visibility Level** profile option is seeded at the:

- **Application level** for seeded applications that integrate with Oracle Knowledge Management.
- **Responsibility level** for the seeded Oracle Knowledge Management responsibilities.

    **Note:** It is a **requirement** to assign a value for the
    **Knowledge: Assigned Visibility Level** profile at implementation
    time for any custom applications or responsibilities that are defined
    that use Oracle Knowledge Management. For more information on
    the seeded values, see Security Settings, page 4-13.

For more information, see also the **Managing Security** chapter in the *Oracle Knowledge Management User's Guide*.

## Define Categories

Categorization of solutions is the process of grouping solutions together for browsing or for performing a category-specific search for solutions. You organize solutions into

categories for convenient management. While a knowledge administrator can create an unlimited number of categories for their company's specific needs, categories are more effective and easier for users to navigate if you limit their number.

For more information, see the **Managing Categories** chapter in the *Oracle Knowledge Management User's Guide*.

For some examples of Solution Categories, see Solution Categories, page 4- 7 .

## Define Category Security Groups

Category Security Groups are defined views of categories that determine whether or not a particular user can access a category, solution, and statement. Category Security Groups are subsets of the master category hierarchy and represent subject areas. After you define the master category hierarchy, you must also define the views--the Category Security Groups--of the master category hierarchy.

By default, there is a single defined seeded Category Security Group. Users have access to the content within a Category Security Group through the **Knowledge: Assigned Category Security Group** profile option. You can set the profile at the Site, Application or Responsibility level. The profile option is seeded at the site level with the single default security group.

For more information, see the **Managing Security** chapter in the *Oracle Knowledge Management User's Guide*.

## Associate Categories with Category Security Groups

When you add a new category, you must associate the category with one of the Category Security Groups before anyone can use the category. This requirement applies even if a user does not want to define extra security settings if the user has defined new categories at the top level, under Home. At the very least, you can associate the newly added category to a default Category Security Group.

## Associate Authoring Flows with Category Security Groups

Before you can use any of the user-defined authoring flows, you must assign the flow to a Category Security Group. This requirement applies even if a user does not want to define extra security settings. At the very least, you can associate all defined authoring flows to a default Category Security Group.

For more information, see Set Up Authoring Flows, page 4- 3 .

# Set Up the Knowledge Base Structure

To effectively manage Oracle Knowledge Management, it is critical to spend some time designing the structure of the knowledge base. Oracle Knowledge Management lets you set up structures that help organize and partition information in the knowledge base. Creating a knowledge base structure that is either overly complex or simple minimizes the effectiveness of the knowledge base.

The knowledge base consists of a series of solutions that contain statements that help solve problems. To organize how to create and identify solutions, Oracle Knowledge Management requires that all statements be associated to a Solution Type and all solutions be associated to a Statement Type. Each Solution Type must have at least one

Statement Type associated to it. In addition, Oracle Knowledge Management provides the ability to create Solution Category folders to help organize the knowledge base.

> **Note:** Solution Types represent the types of solutions in the knowledge base. Statement Types are then associated to these Solution Types to help form the structure for the solutions.

Following are descriptions of Statement Types, page 4- 7 , Solution Types, page 4- 7 , and Solution Categories, page 4- 7 . You can find more information on setting up these structures in the *Oracle Knowledge Management User's Guide*.

## Statement Types

The most granular level of information in the knowledge base is a statement. Statements are the main source of information within the solution. Each statement belongs to a statement type that helps identify the type of information that the statement contains. For example, Action is a statement type--a statement that directs the user to do a particular task to solve an issue.

*Example: Statement Type Example*

**Statement Type**: Action

**Action Statement**: Replace ink cartridge in printer

## Solution Types

Similarly, solutions belong to Solution Types that classify the solution. The Solution Type identifies the mandatory Solution Types that the solution contains. The default Solution Type is the **Symptom-Cause-Action**, which by definition contains at least one Symptom statement, one Cause statement, and one Action statement.

> **Note:** Solution Types represent the types of solutions in the knowledge base. Statement types are then associated to these Solution Types to help form the structure for the solutions.

*Example: Solution Type Example*

**Solution Type**: Symptom or Cause or Action

- **Symptom Statement**: Printer is not printing clearly

- **Cause Statement**: Ink cartridge is low

- **Action Statement**: Replace ink cartridge in printer

## Solution Categories

After a user creates a solution, the user can put the solution into a Solution Category folder that contains a set of related solutions. For example, a solution that covers replacing a printer ink cartridge might be in a Solution Category folder called Printers, which contains similar solutions.

*Example: Solution Category Example*

**Solution Category**: Printers

- **Solution 100**: Printer is not Printing Properly

- **Solution 150**: Printer has a Paper Jam
- **Solution 999**: Printer is Offline

# Set Up Concurrent Programs

This section provides:

- The necessary steps to set up the **request groups** for your concurrent programs.
- Details of how to run and view a concurrent request.

Concurrent programs run simultaneously with other programs or tasks. For a list of concurrent programs and their descriptions, see Concurrent Programs, page D- 1 .

**Login**

Oracle Applications Forms

**Responsibility**

CRM System Administrator Responsibility. Initially, there is no Responsibility by default. You have to create your own Responsibility.

**Prerequisites**

An assigned user with appropriate Responsibility to run the concurrent programs

**Navigation**

Security > Responsibility > Define...Responsibilities window

**Steps**

1. Query your system administrator Responsibility to get the request group name for it.

   A **request group** is a collection of reports or concurrent programs. Your Responsibility's request group determines the requests that appear in the Submit Request window.

2. Navigate to Security > Responsibility > Request.

   The Request Groups window opens.

3. Query the request group name that you obtained for your system administrator Responsibility.

4. Under the Requests section, add the concurrent request if it does not already exist.

5. Complete the following fields:

   **Type**: Program

   **Name**: concurrent program name

   For a complete listing of concurrent programs, see Concurrent Programs, page D- 1 .

6. Save the record.

   **Run a Concurrent Request**

7. If required, switch the Responsibility to System Administrator.

8. Navigate to Concurrent > Requests.

   The Find Requests window opens.

9. Click Submit a New Request.

10. Click Single Request.

    The Submit Request window opens.

11. Select the concurrent request (program) that you want to run.

12. Enter the required parameters.

    You can schedule the concurrent programs to run periodically.

13. Click Submit.

    A confirmation message informs you of a request submission.

    **View the Concurrent Request Status**

14. Navigate to Concurrent > Requests.

    The Find Requests window opens.

15. Enter the Request ID or any other criteria to search for a request, or select All My Requests.

16. Click Find.

    The Requests window opens.

17. To verify the latest status, click Refresh Data.

# Set Profile Options

A critical component of implementing Oracle Knowledge Management is setting the profile options.

Within all Oracle applications or modules, there are seeded profile options. Each module has its own specific set of profile options. Although all profile options are seeded, the system administrator must specify some settings.

## Profile Options for Oracle Knowledge Management

Oracle Knowledge Management has its own set of profile options.

• For a listing of all Oracle Knowledge Management profile options, their descriptions and how to set them up, see Profile Options, page B- 1 .

• For a listing of new, changed, and obsolete profile options, see *About Oracle Knowledge Management in Oracle Supply Chain Management Family Pack J*, available from Oracle*MetaLink*.

# Import Solutions

The Oracle Knowledge Management Solution Import Program loads solutions into Oracle Knowledge Management. For a complete description of the Oracle Knowledge Management Solution Import Program, see Set Up Concurrent Programs, page 4- 8 . Sample File For Solution Import Program, page E- 1  contains a sample file for the Solution Import Program.

# Set Up Top Solutions for Oracle iSupport Users

In Oracle iSupport, you can navigate to the Top Solutions tab to view a list of Frequently Used Solutions and a list of Recommended Solutions.

> **Note:** You must have either added or imported solutions into the knowledge base to perform this setup.

Both Oracle Knowledge Management usage counts and date definition setup are the basis for populating the **Frequently Used Solutions**.

**Recommended Solutions** is a listing of solutions that a Knowledge Administrator or a Knowledge Worker chose and set up in Oracle Knowledge Management.

For information on defining dates for Frequently Used Solution or information on setting up Recommended Solutions, see the *Oracle Knowledge Management User's Guide.*

# Set Up Note Token Rules

Setting up Note Token Rules in Oracle Quality Online lets you define parsing rules and destinations for hyperlinking key words in the Statement Details area. This feature is known as an **AutoLink** in Oracle Knowledge Management.

Topics that describe how to set up Note Token Rules include:

- Define Note Token Rules, page 4-10
- Re-map the Rules for Agent Pages, page 4-12

## Define Note Token Rules

AutoLinks define a set of key token words, for example, **bug**, that maps to an HTML object in the database. If the word **bug** has been created as a note token rule, when you author a solution that contains **bug** and an unique parameter--such as the bug number, for example **bug: 10020**--Oracle Knowledge Management automatically creates a hyperlink to that object in the database.

AutoLinks let you create links automatically to other objects in the application, which is useful in building a knowledge base where there is linked information.

> **Note:** For statement details with content type **Text with** Autolink, you cannot use the following characters as preceding or following characters: **< > " ' % ; ( ) & !**

> **Note:** For statement details with content type **HTML with Autolink**, you could use these characters as the preceding or following characters. If you create the statement details using the Rich Text Editor, you should add the **>** character in the Token Preceding Characters field and the **<** character in the Parameter Following Characters field to enable the **New Line** delimiting character. The Rich Text Editor automatically generates HTML tags to wrap around each paragraph that you type in the editor.

> **Note:** It is highly recommended that if you want to render a URL token as hyperlink, you should use the **HTML** content type--such as **HTML with Autolink**--rather than the **Text** content type.

The following procedures describe how to create Note Token Rules.

**Login**

Oracle Applications login page at http://<host>:<apache port>/OA_HTML/jtflogin.jsp

**Responsibility**

DEMS administrator

**Prerequisites**

None

**Navigation**

Token Rules > Summary

**Steps**

1. Click Create Token Rule.

2. In the Name text field, type a unique Name.

3. In the Description text field, type a description.

4. In the Token section, type the key word to hyperlink in the Value field.

   For example, enter a name for the linked text, such as: http://.

5. Set Preceding and Following Delimiting Characters.

   The Preceding Delimiting Characters distinguish your token value from identical text values, and the Following Delimiting Characters determine where the hyperlink stops. Any combination of Following Characters are allowed between the Token Value and the Parameter, if any.

6. In the Parameter section, choose a Parameter type--Alphanumeric, Numeric or No Parameter--from the Type list.

7. Enter the Following Delimiting Characters for the parameter, if desired, or select the appropriate delimiting boxes.

   If you chose No Parameter, then you cannot specify the Following Characters, Minimum Length, or Maximum Length options.

8. Enter your minimum and maximum length parameters.

9. In the Destination section, choose a Type from the list.

   For example, if your type is Function, choose a User Function Name from the list. You may need to create this function. If your type is URL, enter the base URL in the Base URL text field.

10. Create a function in Forms.

    You need to create a function in Forms only if you chose **Function** for the Type in the preceding Step.

    The function points to the AutoLink destination. For more information on how to create a function, see the *Oracle Applications System Administrator's Guide*.

11. Click Create.

    To leverage this token rule in Oracle Knowledge Management, you must map it to one of the Oracle Knowledge Management Objects--such as **Knowledge Base**

**Solution** or **Knowledge: OA Solution**--through the following steps, Map a Token Rule to an Object, page 4-12.

**Map a Token Rule to an Object**

12. Click the Mapping tab.

    The Token Rule Mapping page appears.

13. For token used **customer pages**, from the Object type list, choose the **Knowledge Base Solution** option and click Go.

    For token used **agent pages**, from the Object type list, choose the **Knowledge: OA Solution** option and click Go.

    For token used **agent pages**, if the Note Token Rule is the Function type, the function definition should include **&cskDLink=OA**.

    For **customer pages**, if the Note Token Rule is the Function type, the function definition should NOT include **&cskDLink=OA**.

    If the Note Token Rule is Function type, the Function type should be **INTEROPJSP**.

    The page shows the values that have already been mapped to the object.

14. In the Sequence field, enter a number.

15. Choose the Token Rule that you created from the Rule list.

16. Specify a Start Date.

17. Specify an End Date.

18. Click Update.

    The token rule is mapped to the Knowledge Base Solution object.

## Re-map the Rules for Agent Pages

When upgrading from an existing Oracle Knowledge Management release to this release, pay attention to:

• Because agents and customers have different sets of Note Token Rules in this release compared to previous releases, where they have the same set of Note Token Rules, you must map Note Token Rules that you defined before the upgrade to a new object **Knowledge: OA Solution** if you would like agents to share the same rules. The upgrade does not automatically re-map existing rules.

• For rules that use FND function, the Function type must be of INTEROP JSP type.

# Upgrade Considerations

You should consider the following upgrade issues before upgrading Oracle Knowledge Management:

• Text Indexes, page 4-13

• UnCategorized Solutions, page 4-13

• Security Settings, page 4-13

• Implement Custom Search Repository, page 4-15

• Re-work Customized Menus, page 4-15

- Re-map the Rules for Agent Pages, page 4-12

## Text Indexes

The Oracle Text index for Oracle Knowledge Management incorporates the Category Security Group and Visibility verification for security. All searches are secured searches.

After patching to upgrade Oracle Knowledge Management, the Oracle Text indexes that Oracle Knowledge Management uses is rebuilt. Rebuilding of the index does not occur until after you have completed patching.

You must assigned the **Knowledge Management: index synchronization set** request set to your request group for submitting index maintenance requests. For more information on assigning a request group to a Responsibility, see the *Oracle Applications System Administrator's Guide*.

## UnCategorized Solutions

Because all solutions must be associated with at least one category, non-categorized solutions are associated with a new category, **UnCategorized Solutions** during upgrade.

## Security Settings

Seeded security profile settings include:

- **Default Category Security Group**: A seeded default Category Security Group, which is assigned to the **Knowledge: Assigned Category Security Group** profile at the site level. It contains all the categories in the system, including the UnCategorized Solutions, page 4-13 category.

- **Knowledge: Assigned Visibility Level profile**: Has values seeded at the application and Responsibility levels for the Oracle Knowledge Management-related applications and responsibilities. For example, the profile's seeded value is **External** for Oracle iSupport and is **Internal** for the Oracle Service application and the corresponding responsibilities.

- Users with restricted permission assigned before upgrade may need to update the Visibility profiles to Restricted level in order to access the data with Visibility set to **Restrict**.

- If users have defined custom applications or responsibilities for Oracle Knowledge Management, the security profiles have to be set accordingly after upgrade before Oracle Knowledge Management can function properly. There are no seeded values for the solution and statement Visibility profiles at the site level.

### Security Seedings

The security seedings are:

- **Knowledge: Assigned Category Security Group**: Set this seeding at the **site** level to the **Default Category Group**, which was created as part of the upgrade.

- **Knowledge: Assigned Visibility Level**: Set this seeding at both the application and Responsibility level.

  The application-level seedings are:

  - CS - Oracle Service = Internal

- CSC - Customer Care = Internal

- CSD - Depot Repair = Internal

- CSF - Field Service = Internal

- AST - TeleSales = Internal

- AZ - Application Implementation = Internal

- CSS - Oracle Support = Internal

- IEX - Oracle Collections = Internal

- OKL - Oracle Contracts for Lease = Internal

- XNC - Oracle Sales for Communications = Internal

- XNS - Oracle Service for Communications = Internal

- IBU - iSupport = External

- IEM - Oracle eMail Center = External

- PV - Oracle Partner Relationship Management = External

  The Responsibility-level seedings are:

- CS_KB_SYS_ADMIN = Internal

- CS_KB_KNOWLEDGE_WORKER = Internal

- CS_KB_AGENT = Internal

- **Knowledge: Assigned Statement Visibility Level**

  : Set this at both the application and Responsibility level.

  The application-level seedings are:

  - CS - Oracle Service = Internal

  - CSC - Customer Care = Internal

  - CSD - Depot Repair = Internal

  - CSF - Field Service = Internal

  - AST - TeleSales = Internal

  - AZ - Application Implementation = Internal

  - CSS - Oracle Support = Internal

  - IEX - Oracle Collections = Internal

  - OKL - Oracle Contracts for Lease = Internal

  - XNC - Oracle Sales for Communications = Internal

  - XNS - Oracle Service for Communications = Internal

  - IBU - iSupport = External

  - IEM - Oracle eMail Center = External

  - PV - Oracle Partner Relationship Management = External

    The Responsibility-level seedings are:

- CS_KB_SYS_ADMIN = Internal
- CS_KB_KNOWLEDGE_WORKER = Internal
- CS_KB_AGENT = Internal

## Implement Custom Search Repository

Because of the changes in the way to add search repositories for Simple Search for agent pages:

- If customers had previously added new repositories for agents in the previous release, you need to develop corresponding code in OA for the respective repositories.

- You need to code the OA region for displaying the search result and the data sources for getting the result and the search count information.

For more information, see Define Simple Search Repositories, page 5- 3 .

## Re-work Customized Menus

To accommodate the OA security model, the menus have been heavily redesigned. You may have to reconfigure seeded menus that you have customized in order for the customized menus to work properly with the latest menus in Oracle Knowledge Management.

For more information about Oracle Knowledge Management menus, see Access Control, page 3- 1 .

# Performance Considerations

Some issues to consider about performance include:

- Make Changes to Security Setup, page 4-15
- Using Parallel Workers, page 4-15

## Make Changes to Security Setup

When you make changes to the security setup, this may cause many solutions in Oracle Knowledge Management to be marked for text re-indexing. When many solutions are pending for re-indexing, the subsequent index synchronization requires more time to complete.

Examples of security setup changes include:

- Adding or removing a Visibility level.

- Adding or removing a large category--that contains many subcategories and solutions--to or from a Category Security Group.

## Using Parallel Workers

To significantly reduce the amount of time to rebuild the Oracle Knowledge Management Text indexes, use parallel workers. Each index synchronization program includes the **Number of workers** parameter. The **Number of workers** parameter is number of

processes that can run at the same time when creating the Oracle Text indexes, such as solution index, statement index, and forum index.

> **Note:** The Number of workers parameter applies only to the **drop and recreate** (DR) **mode**. The **DR mode** is available in the index synchronization programs. When you use this mode, Oracle Knowledge Management drops the text index and recreates it from scratch.

# 5

# Customizations and Extensions

This chapter covers the following topics:

- About this Chapter
- Customize with Personalization
- Define Simple Search Repositories

## About this Chapter

This chapter includes customization and extension tasks to set up Oracle Knowledge Management.

## Customize with Personalization

The OA framework provides personalization functionality to the agent user interface. Personalization allows easy configuration of pages to match the business needs of different customers.

The following are examples of OA framework personalization:

- If you want to hide the Platform field from Oracle Knowledge Management, you need to hide the corresponding Platform region on the pages that show it, including the View Solution page, Advanced Solution Search Criteria page, and the Update Solution page.
- Similarly, you can hide or show the **Using** search option and the Search Related Solution button on Advanced Solution Search page.

In addition to the preceding examples, the OA framework provides flexibility in customization, such as:

- Hiding or showing of items and regions.

  > **Note:** By default, the following are hidden fields: **Solution Type** and **Using** on the Advanced Solution Search Criteria page, **Usage** column in the Solution Result table on the Advanced Solution Search Result page. You can turn on these fields through personalization.

- Reordering of items and regions.
- Renaming of buttons, prompts, and column headers.

  For example, you can:

- Hide score columns from search results.
- Hide Solution Type and Visibility lists, items, platform, external links, and task template regions to simplify create solution.

### Important Notes on Personalization

Following are important notes about using Personalization with Oracle Knowledge Management.

- Refrain from hiding required items that do not have a default value. Also, you should not hide functionally required items. For example, hiding the Go button or Search button on Search page does not make sense.
- Do not overwrite the Controller class.
- Do not change the displayed number of records of table if the table is set to display 200 records. The intention of displaying such tables is to show all data at one time.

### Restrictions on Personalization

The following is a list of restrictions for using personalization.

- You cannot hide or modify the page title of the Solution Details page and the Statement Details page.
- You cannot disable the link on the category bin of the Solution Details page.
- The configuration of the Simple Search result layout uses a different mechanism than personalization. For more information, see Define Simple Search Repositories, page 5- 3 .

### Configure with Function Instead of Personalization

You must configure the following items using function instead of personalization since they are security related:

- Update, Edit, and Get Lock buttons on Solution Details page.
- Advanced Search button.
- Create Solution button.

For more information, see Access Control, page 3- 1 .

### Personalize Attachments

The following are notes for personalizing attachments:

- If you enable **Enable Document Catalog** for the attachment table, be aware that other users may be able to search for the attachments. You should verify the attachment category settings to ensure enforcement of security.
- If you want to have different categories for your attachments, then you should personalize for the following pages: Create Solution, View Solution, Preview Solution, and Read-only View Solution to add the categories to the attachment table. Unless you do this consistently, you will not see the attachment added to a category, which is not in the attachment table for some other page.

### Personalize by Setting FND: Personalization Region Link Enabled

You can personalize the following items by setting **FND: Personalization Region Link Enabled**:

- Search criteria sandbox on Simple Search.

- Simple Search Result subordinate tab areas.
- Notification page.

**Personalization Resources**

For more information on personalization, see:

- *Oracle Applications Framework Personalization Guide Release 11i (11.5.10)* (Metalink Note 268969.1)
- *Oracle Applications Component Reference Release 11i (11.5.10)* (Metalink Note 269136.1)

# Define Simple Search Repositories

Main topics that help you manage Simple Searches include:

- Define an Agent-Facing Simple Search Repository, *Oracle Knowledge Management Implementation Guide*
- Create an Agent-Facing Simple Search Repository, page 5- 5
- Define a Customer-Facing Simple Search Repository, page 5- 8
- Create a Customer-Facing Simple Search Repository, page 5- 9

## Define an Agent-Facing Simple Search Repository

You can add or remove agent repositories for use in Oracle Knowledge Management.

> **Note:** Before you can add a repository, verify that you have created an agent-facing Simple Search repository. For more information on creating agent-facing repositories, see Create an Agent-Facing Simple Search Repository, page 5- 5 .

The agent-facing Simple Search is built on the Oracle Applications Framework technology stack. Defining a new agent-facing Simple Search repository requires you to create a new OA JRAD region and write code for the associated Controller Object and View Objects. For information about creating a new repository, see Create an Agent-Facing Simple Search Repository, page 5- 5 .

After you have obtained the OA JRAD region name and View Object names for the new repository, you can include repositories in agent Simple Search.

**Login**

Oracle Applications login page at http://<host>:<apache port>/OA_HTML/jtflogin.jsp

**Responsibility**

CRM HTML Administration

**Prerequisites**

Obtain the OA JRAD region name and View Object names for the new repository.

**Navigation**

Settings > System > Properties > Advanced

**Steps**

1. From the View list, choose the CS product code

2.  To add a new key:

    1.  Click Create.

    2.  Enter the region name as the key, for example: **/oracle/apps/cs/knowledge/ solution/search/webui/SolutionResultsRN**

    3.  Enter the search View Object name as the first value (sequence 0), for example: **oracle.apps.cs.knowledge.solution.search.server.UnifiedSearchSolutionsVO**

    4.  Enter the count View Object name as the second value (sequence 1), for example: **oracle.apps.cs.knowledge.solution.search.server. CountUnifiedSearchSolutionsVO**

3.  Click the Update button.

4.  Click the **CS_KB_REPOSITORY_LIST** hyperlink.

5.  Add the key that you created in step 2 as a value in the table.

    The order of the values defines the tab order of the search results.

    > **Note:** **CS_KB_REPOSITORY_LIST** is the default search repository list key that the product includes. It is defined at the site level of the profile option **Knowledge: Simple search repository key**. If you change the value of this profile option, you need to add the key of your repository as a value of the new repository list key.

### Remove a Seeded Repository from Simple Search

The following procedures describe how to remove a seeded repository from Simple Search.

**Login**

Oracle Applications login page at http://<host>:<apache port>/OA_HTML/jtflogin.jsp

**Responsibility**

CRM HTML Administration

**Prerequisites**

None

**Navigation**

Settings > System > Properties > Advanced

**Steps**

1.  From the View list, choose the **CS** product code.

2.  Click the **CS_KB_REPOSITORY_LIST** link.

    Each value of this key is the region name of a repository.

3.  Select the check box for the repository that you want to remove, and click the Update button.

## Create an Agent-Facing Simple Search Repository

You can create new **agent** Simple Search repositories. If you want to create **customer** Simple Search repositories, see Create a Customer-Facing Simple Search Repository, page 5- 9 .

> **Note:** The steps within this section are optional.

For more information, see the *Oracle Applications Framework Release 11i Documentation Road Map* (Metalink Note 275880.1).

The following topics describe how to create new agent Simple Search Repositories:

- Create a New View Object to Perform Search, page 5- 5
- Create a New View Object to Perform the Count Query, page 5- 6
- Create a New JRAD Region, page 5- 7
- Create a New Controller Object for Your Region, page 5- 7

### Create a New View Object to Perform Search

The following procedures describe how to create a new View Object to perform searches.

**Login**

Not applicable

**Responsibility**

Not applicable

**Prerequisites**

Not applicable

**Navigation**

Not applicable

**Steps**

1. Create a new View Object (**VO.xml**) that includes the query to retrieve results from your new repository.

2. Create a new View Object implementation (**VOImpl.java**) that extends **oracle.apps.cs.knowledge.solution.search.server.RepositoryStandard.**

   Example: **UnifiedSearchSolutionsVOImpl.java**

3. Implement the **setParameter(HashMap)** method of the **VOImpl**.

   You should set all the mandatory parameters in your query in this method.

   The HashMap stores the following search criteria:

   - **KMSearchConstants.SEARCH_METHOD** is the key for search method
   - **KMSearchConstants.SEARCH_KEYWORD** is the key for key word
   - **KMSearchConstants.PRODUCT_ID** is the key for inventory item ID
   - **KMSearchConstants.PRODUCT_ORG_ID** is the key for inventory item organization ID.

- **KMSearchConstants.CATEGORY_ID** is the key for the current Solution Category ID.

4. Override **executeQuery()** if you want to customize the behavior of your VO before or after the query execution.

   You need to invoke **super.executeQuery()** in your method.

5. Place **VO.xml** in the package under in **$APPL_TOP/java**.

6. Compile **VOImpl.java** and place the **.class** in the package under **$APPL_TOP/java**.

### Create a New View Object to Perform the Count Query

The following procedures describe how to create a new View Object (VO) to perform the count query. This VO gets the total number of records that match the search criteria.

**Login**

Not applicable

**Responsibility**

Not applicable

**Prerequisites**

Not applicable

**Navigation**

Not applicable

**Steps**

1. Create a new View Object (**CountVO.xml**) that includes the query to retrieve the results count from your new repository.

2. Create a new View Object implementation (**CountVOImpl.java**) that extends **oracle.apps.cs.knowledge.solution.search.server.RepositoryStandard**.

   Example: **CountUnifiedSearchSolutionsVOImpl.java**

3. Implement the **setParameter(HashMap)** method of **CountVOImpl**.

   You should set all the mandatory parameters in your query in this method.

   The HashMap stores the following search criteria:

   - **KMSearchConstants.SEARCH_METHOD** is the key for search method.

   - **KMSearchConstants.SEARCH_KEYWORD** is the key for key word.

   - **KMSearchConstants.PRODUCT_ID** is the key for inventory item ID.

   - **KMSearchConstants.PRODUCT_ORG_ID** is the key for inventory item organization ID.

   - **KMSearchConstants.CATEGORY_ID** is the key for the current Solution Category ID.

4. Override **executeQuery()** if you want to customize the behavior of your VO before or after the query execution.

   You need to invoke **super.executeQuery()** in your method.

5. Place **CountVO.xml** in the package under in **$APPL_TOP/java**.

6. Compile **CountVOImpl.java** and place the **.class** in the package under **$APPL_TOP/java**.

### Create a New JRAD Region

The following procedures describe how to create a new JRAD region.

**Login**

Not applicable

**Responsibility**

Not applicable

**Prerequisites**

Not applicable

**Navigation**

Not applicable

**Steps**

1. Create a new JRAD region in its own XML file.

   Example: **SolutionResultRN.xml**

   The style of the region should be **defaultSingleColumn**.

2. The UI components can reference the corresponding search VO.

   Example: **UnifiedSearchSolutionsVO**

3. Import the JRAD region into the database using XMLImporter.

### Create a New Controller Object for Your Region

The following procedures describe how to create a new controller object for your region.

**Login**

Not applicable

**Responsibility**

Not applicable

**Prerequisites**

Not applicable

**Navigation**

Not applicable

**Steps**

The Controller code (CO.java) can reference the corresponding search VO, for example, **UnifiedSearchSolutionsVO**.

1. Add logic to the processRequest() method to programmatically control the UI components of your region.

2. Add logic to the **processFormRequest(**) method to process event from your region.

3. Compile **CO.java** and place the **.class** in the package under **$APPL_TOP/java**.

To add or remove agent Simple Search repositories, see Define Agent-Facing Simple Search Repositories, *Oracle Knowledge Management Implementation Guide*.

## Define Customer-Facing Simple Search Repositories

You can add or remove customer-facing repositories for use in Oracle Knowledge Management.

> **Note:** Before you can add a repository, verify that you have created a Simple Search repository for customers. For more information on creating customer repositories, see Create a Customer-Facing Simple Search Repository, page 5- 8 .

Customer-facing Simple Search--also known as Basic Search--is built on the CRM Technology Foundation (JTT) technology stack.

Topics in this section include:

- Include a New Customer-Facing Simple Search Repository, page 5- 8
- Remove a Seeded Repository from the Simple Search, page 5- 9

### Include a New Customer-Facing Simple Search Repository

The following procedures describe how to include a new repository in the Simple Search.

**Login**

Oracle Applications login page at http://<host>:<apache port>/OA_HTML/jtflogin.jsp

**Responsibility**

CRM HTML Administration

**Prerequisites**

Obtain the Java Search Factory name

**Navigation**

Settings > System > Properties > Advanced

**Steps**

1.  Define the repository in the CRM Technology Foundation (JTT) QuickFind Framework.

    You might need to write code for searching repositories that the product does not include. For more information, see Create a Customer-Facing Simple Search Repository, page 5- 9 .

2.  Lookup the profile option **Knowledge: Repositories to search across in simple search** and add the category of the new repository at the appropriate level: Site, Application, Responsibility, or User.

    For more information on profile options, see Set Up Profile Options, page B- 2 .

    > **Note:** The category of the new repository is the value of the JTT property **service.<classpath>.categories** that you created when setting up the JTT QuickFind repository.

3.  Bounce the Web server.

**Remove a Seeded Repository from the Simple Search**

The following procedures describe how to remove a seeded repository from the Simple Search.

**Login**

Oracle Applications Forms

**Responsibility**

System Administrator

**Prerequisites**

None

**Navigation**

Profile > System...Find System Profile Values window

**Steps**

1.  Look up the profile option **Knowledge: Repositories to search across in simple search** and remove the category of the repository at the appropriate level: Site, Application, Responsibility, or User.

    For more information on profile options, see Set Up Profile Options, page B- 2 .

    > **Note:** The category of the new repository is the value of the JTT property **service.<classpath>.categories** that you created when setting up the JTT QuickFind repository.

2.  Bounce the Web server.

## Create a Customer-Facing Simple Search Repository

You can create new **customer-facing** Simple Search repositories. If you want to create **agent-facing** Simple Search repositories, see Create an Agent-Facing Simple Search Repository, page 5- 5 .

> **Note:** The steps within this section are optional.

Topics in this section include:

*   Terminology, page 5- 9
*   API's, page 5-10
*   Develop the Search Service, page 5-12
*   Register the Category, page 5-12
*   Register the Search Service, page 5-13

**Terminology**

Terminology includes:

*   SearchKeySet, page 5-10
*   SearchItem, page 5-10
*   SearchResult, page 5-10

- SearchService, page 5-10
- SearchManager, page 5-10

**SearchKeySet**

The **SearchKeySet** class represents the search queries. A search query specifies one or more search keys along with following optional qualifiers:

- The plus sign (+) represents a required search key.
- The negative sign (-) represents a search key to exclude.

A search string without any qualifier represents an optional key.

For example, **key1 +key2 -key3** is a query, where **key1** is optional, **key2** is required, and **key3** should be excluded.

An instance **SearchKeySet** contains parsed information for each type of search key.

**SearchItem**

**SearchItem** is an interface for any display program to display search results from various engines in a uniform fashion. Individual applications must implement this interface and can extend it for more advanced usage.

**SearchResult**

**SearchResult** is the class that represents the search results. It contains a vector of SearchItems, page 5-10. A search runs in batches. An instance of SearchResult represents one batch. It also contains information about the total size of the search result, the starting index, the search factory used to do the search and the search result heading, and any hints for searching.

**SearchService**

**SearchService** is an abstract class that serves as the super class for all search service implementations. It is a template for developers to write search engines to fit in the Search Management mechanism, namely to work with the SearchManager, page 5-10. The SearchService runs in a separate thread. This class provides APIs for finding when to stop the search and to make the search results accessible to the SearchManager.

**SearchManager**

**SearchManager** is the core class that hooks up all of the preceding pieces together and performs the search operation. SearchManager provides the method for searching for a key in a given category. SearchManager also provides APIs for finding out all the categories from the application configuration and interfacing with FND_Lookup tables for registering new categories and retrieving them. Each category has a key, which the system uses for searching, and a corresponding value, which the system uses for display purposes.

**APIs**

**SearchItem Interface: public interface oracle.apps.jtf.search.SearchItem**

**public int getPercentMatch();**

Returns a number greater than zero and at most 100. This number represents the confidence level of the match.

**public String getTitle();**

Returns the name of the matching object to display.

**public String getDescription();**

Returns a short description of the matching object. This method is optional. Its result does not appear by default.

**public String getLink();**

Returns the hyperlink to access the matching object.

**public Hashtable getCustomAttribVals();**

Note that the SearchItem can hold application specific search item information as name value pairs in a hash table. Using this mechanism, each application can pass back custom information as part of the search result.

**SearchService Class: public abstract class oracle.apps.jtf.search.SearchService**

**public abstract void search(String category, SearchKeySet query, int limit, int start, int batchSize, Hashtable extraSearchParams)**

Searches and uses insert, setTotal, and setHint methods to send results to the calling thread.

Parameters:

- **category**: The category key that the user chose. This is the key used in **FND_LOOKUPS**.

- **query**: The query string that conforms to standard search engine syntax.

- **limit**: The maximum number of objects to retrieve. The value **-1** denotes no limit.

- **start**: The zero-based index of the first item to retrieve. This value must be at least zero.

- **batchSize**: The number of items to retrieve for display. This value must be greater than zero. The specification of limit, start, and batchSize allows the SearchManager to access cached results by the search engine, if caching is implemented.

**protected final void insert(SearchItem s);**

For each matched item found, the search service needs to create an instance of SearchItem and uses this method to make it accessible to the SearchManager.

**public abstract String getName();**

Returns the name to be published in the Searchable object directory. Each service implementation needs to implement this method.

**public abstract String getUsage();**

Returns usage info, such as special parameters. Each service implementation needs to implement this method.

**SearchManager Class: public abstract class oracle.apps.jtf.search.SearchManager**

**public static Hashtable search(String category, String query, int start, int limit, Hashtable extraSearchParams);**

Performs the following tasks:

- For a given query string, the API parses a given query string to create an instance of SearchKeySet.

- It finds out which search factory corresponds to the given category and creates an instance of the corresponding service.

- It invokes the service instance **search** (as explained above) in a separate thread. The parameter batchSize is obtained from the application configuration property **search.service.batchsize**. The time-out value for each search thread is obtained from the property **search.service.timeout** (in ms).

- It returns the search result in a hash table. The hash table contains the service name and corresponding instance of SearchResult. The instance of SearchResult itself has a vector of SearchItems on which the search service implementation invoked the **insert** method. For additional information, see SearchService, page 5-10.

- If the category is **SearchManager.ALL_ENGINES**, then the search manager invokes search on the search factories specified in application configuration.

### Develop the Search Service

You must write the search service factory and the corresponding search service implementation. Each service factory corresponds to one or more search categories. The search service factory can be a standard class, such as the sample search factories in **oracle.apps.jtf.devtest.services.SimpleSearchFactory**. The difference is the creation of the service instance. The service implementation class must inherit from SearchService. It must implement the search method as described above under SearchService. For each matched item found, the search service needs to create an instance of SearchItem and use the insert method of the superclass to make it available to the SearchManager. Additionally, each service must implement the following, which are described further above:

- **public abstract String getName();**

- **public abstract String getUsage();**

The search service also must set the total number of items returned and the search result heading used for display purposes. Do this using the following methods of its superclass:

- **protected final void setTotal(int total)**

- **public final void setResultHeading(String heading)**

You can look at **oracle.apps.jtf.devtest.services.SimpleSearch** for sample search service implementation. Note that a service runs in a new thread. It shares its session with the main thread. Therefore, the restrictions of spanning a new thread applies to the search thread. For example, you cannot use the transaction service within the new service. To get a database connection, use **oracle.apps.jtf.aom.transaction.TransactionScope.getNewConnection()** rather than **oracle.apps.jtf.aom.transaction.TransactionScope.getConnection()**. Note that **oracle.apps.jtf.search.SearchService** provides the method protected final boolean **timeToStop()**, which you can use in the service implementation to find out whether the time that the SearchManager provided for service execution has expired.

### Register the Category

You must register each search category in the **FND_Lookup** tables. Register them under the category **IBU_SEARCH_CATEGORIES**. SearchManager provides API's for registering a new category with FND tables. Each category consists of a category code (a parameter to the search service implementation that you use in application configuration) and the corresponding value (used for display purposes only).

**Login**

Oracle Applications Forms.

**Responsibility**

Application Developer

**Prerequisites**

Develop the Search Service, page 5-12

**Navigation**

Application Developer > Application Object Library

### Register the Search Service

All the search service factories for current application are registered with the property **search.factories**. The definition for this property is:

**search.factories = <factory1 class name >;<factory2 class name>; …**

For example:

**search.factories = oracle.apps.jtf.devtest.services.ComplexSearchFactory;oracle.apps. jtf.devtest.services.SimpleSearchFactory**

For each search factory, you must provide the following entries:

*   **<factory class name>.desc = <factory descriptor>**

    // **factory descriptor** can be string, which is used to

    // obtain the instance of the search service from the service manager, if needed

*   **<factory class name>.categories = <cat fnd code1>;<cat fnd code 2>;….**

    where **<cat fnd code>** are the category codes as registered above.

For example:

*   **service.oracle.apps.jtf.devtest.services.SimpleSearchFactory.desc = SimpleSearch.item**

*   **service.oracle.apps.jtf.devtest.services.SimpleSearchFactory.categories = bar;newbar**

**Login**

System Administrator Console within the CRM Technology Foundation

**Responsibility**

CRM HTML Administration

**Prerequisites**

Register the Category, page 5-12

**Navigation**

Settings > System > Properties > Advanced

**See Also**

To add or remove Simple Search repositories for customers, see Define Customer-Facing Simple Search Repositories, page 5- 8 .

# Part 3

## Post Implementation Tasks

This part contains the following chapters:

# 6

# Verifying Implementation

This chapter covers the following topics:

- Verification of Implementation
- Verify Setups
- Verify Knowledge Authoring
- Verify Knowledge Search

## Verification of Implementation

The following sections guide you through verification of correctly implementing Oracle Knowledge Management:

- Verify Setups, page 6- 1
- Verify Knowledge Authoring, page 6- 2
- Verify Knowledge Search, page 6- 2

## Verify Setups

The following procedures summarize how to verify setups.

**Steps**

1. Verify that you have created the required Users for your implementation.

2. Verify that you have created one or more resource groups (which is required for creating authoring flows).

3. Verify your Authoring Flow Setup:

   - Create, view and update an authoring flow. This includes associating the Steps to the Authoring Flow, which are associated to the resource groups already created.

4. Verify your Security Setup:

   1. Create, view, and update a Visibility.

   2. Create, view, and update categories.

   3. Create, view, and update a Category Security Group.

   4. Associate Categories to the Category Security Group.

   5. Associate Authoring Flows to the Category Security Group.

5. Verify your Knowledge Base Structure:

   1. Create, view, and update a Solution Type.

   2. Create, view, and update a Statement Type.

   3. Associate and disassociate a Statement Type to a Solution Type.

   4. Relate Statement Types to Note Types (for Integration).

   5. Create, view, and update the Frequently Used Definitions.

6. Verify that you have set up the Oracle Knowledge Management profile options.

7. Verify that you have permission to run the Oracle Knowledge Management concurrent programs. The required concurrent programs have been added to a Request Group that your System Administrator Responsibility uses. For a list of concurrent programs and their descriptions, see Concurrent Programs, page D-1 .

## Verify Knowledge Authoring

The following procedures summarize how to verify knowledge authoring in Oracle Knowledge Management.

**Steps**

1. Create a solution.

2. Create a statement and associate it to a solution.

3. Associate a category to a solution.

4. Associate a item to a solution (if used in your implementation).

5. Associate a platform to a solution (if used in your implementation).

6. Associate attachments to a solution.

7. Associate a task template to a solution (if used in your implementation).

8. Associate an external objects to a solution (if used in your implementation).

9. Save the solution.

10. After saving the solution, add a solution comment to the solution.

11. Submit a solution to an authoring flow.

12. View and search solutions in progress.

13. Check-out and update an in-progress solution.

14. Publish a solution.

15. Run the Solution Index Synchronization Concurrent Program (Sync).

## Verify Knowledge Search

The following procedures summarize how to verify searching in Oracle Knowledge Management.

**Steps**

1.  Perform a Simple Search. After the **Knowledge Management Statement Index Synchronization** concurrent program has completed successfully, verify that you can search for the solution that you created in the Authoring Verification Section.

2.  Perform an Advanced Solution Search.

3.  Perform a Statement Search.

# 7

# Diagnostics and Troubleshooting

This chapter covers the following topics:

- About this Chapter
- Search Related Problems
- Integration Related Problems
- Authoring Related Problems
- Setup Related Problems
- Miscellaneous Problems

## About this Chapter

This chapter provides instructions on how to correct errors and provides work-arounds for common problems that you can experience in configuring or administering Oracle Knowledge Management.

## Search Related Problems

**What are the factors that determine the solutions that I can see in Oracle Knowledge Management?**

In Oracle Knowledge Management, the biggest factors that determines which solutions a user can see are:

- The solution contents.
- The users access to this content, such as Security.

Security concerns the following areas:

- **Category Security Group**: Which categories has the user been granted access to?
- **Category Visibility**: Within the category, which categories are visible to the user?
- **Solution Visibility**: Which solutions within the current Category Security Group are visible to the user?
- **Statement Visibility**: Which statements (within the visible solutions) are visible to the user?

For information regarding Security setup, see:

- Set Up Security, page 4- 5 .

- The Managing Security chapter in the *Oracle Knowledge Management User's Guide*.

**After upgrading to 11.5.10, I cannot search for solutions.**

- Be aware that building indexes is a post-installation process.

- To minimize the patching time, Oracle Knowledge Management creates the index structure during patching. Oracle Knowledge Management then submits a concurrent request--**in DR mode**--for rebuilding the index.

- Search does not work until indexes are rebuilt.

**Why can I not find a new solution using** Advanced Solution Search or Simple Search pages?

The system must index a solution before you can retrieve it through a search. To search and view new solutions, you must first run the **Knowledge Management Solution Index Synchronization** concurrent program to refresh the solutions and the solution count in the knowledge base.

If the Solutions are indexed and are still not showing in the search results, you must verify your Oracle Knowledge Management Security Setup to verify if you have the required access to see the solutions.

Users can search only published solutions in Simple Search or Advanced Solution Search.

**When are solutions marked for re-indexing?**

Whenever a solution is updated, it is marked for re-indexing.

**After upgrade, I cannot see restrict solutions or statements.**

If you have restrict permission assigned before upgrade, change the solution Visibility and statement Visibility profiles to **Restrict**.

**During searching, I have encountered error "Your search did not return any results in Solutions. Please contact your system administrator if this problem continues."**

Your Oracle Knowledge Management indexes may be corrupted.

To resolve this, submit a concurrent request to drop and recreate the index (**mode = DR**). If you know which specific index is corrupted, you can submit the related index synchronization program. If not, you can submit the request set to rebuild all the indexes. If you have lots of data, rebuilding all indexes may take a while.

**When I try to do a Simple Search for a solution, I get the following error message: java.sql.SQLException: ORA-20000: Oracle Text error: DRG-10599: column is not indexed.**

The Oracle Text index column on your environment is not indexed, or the index is still being built. If the **Knowledge Management Solution Index Synchronization** concurrent program is running, then wait until the concurrent program has completed. Otherwise, you can recreate the index by submitting this concurrent program using the **DR** mode. You can also do this by running the following script:

`$APPL_TOP/cs/patch/115/sql/cskbsetx.sql`.

**What does the following error indicate:java.sql.SQLException: ORA-20000: Oracle Text error: DRG-10599: column is not indexed?**

The Oracle Text index column on your environment is not indexed, or the index is still being built. If the concurrent program associated to the index that gives this error is running, wait until the concurrent program has completed. Otherwise, you can recreate

the index by submitting this concurrent program using the **DR** (drop and recreate) mode. Depending on the index, you can drop and recreate the index by running **one** of the following scripts:

- For solutions: *$APPL_TOP/cs/patch/115/sql/cskbsetx.sql*

- For statements: *$APPL_TOP/cs/patch/115/sql/cskbelex.sql*

- For categories: *$APPL_TOP/cs/patch/115/sql/cskbcatx.sql*

- For forum messages: *$APPL_TOP/cs/patch/115/sql/cskbforx.sql*

**I get the following java error when I click Find Similar Statements on the Solution Detail window: java.sql.SQLException: ORA-20000: Oracle Text error: DRG-10599: column is not indexed.**

The Oracle Text Index is missing or it is being built. If the **Knowledge Management Statement Index Synchronization** concurrent program is running, then wait until the concurrent program has completed. Otherwise, you can recreate the index by submitting this concurrent program using the **DR** mode. You can perform this by running the following script:

*$APPL_TOP/cs/patch/115/sql/cskbelex.sql <cs user>*

**Can the search methods (Using) on the** Advanced Solution Search or the Simple Search page be configured?

Yes, you can configure the search methods on the Advanced Solution Search. The **CS_KB_SEARCH_TYPE_OPTIONS** Lookup Type contains a list of lookup values that represent the different search methods.

## Integration Related Problems

**Upon launching the Oracle Knowledge Management HTML user interface from the Service Request form, I receive the following error: "You have insufficient privileges for the current operation. Please contact your System Administrator."**

You may not have the appropriate security menu or function granted. For details of access control settings, see Access Control, page 3- 1 .

**Why do I not get results when I use Oracle Knowledge Management from Service Request to search for a solution?**

First of all, verify that you can search as a Knowledge Administrator:

- Run the Knowledge Base Sync Index concurrent program to re-index the Oracle Knowledge Management solutions.

- Verify that the solutions that you have created and submitted are not in the Draft status. The solutions must be in the Published status to be re-indexed.

If you can search as Knowledge Administrator, then verify that the Oracle Knowledge Management's required security profiles are properly set up for the application or Responsibility that you are using. For more information, see Set Up Security, page 4- 5 .

If you cannot perform a search even as a Knowledge Administrator (providing that you have already set up the required security profiles), then verify that the package **cs_ kb_ctx_pkg** is installed in your environment's **ctxsys** schema. If this package is not installed or is improperly installed, then the Oracle Text text indexes cannot properly become populated, and you cannot find anything in the knowledge base.

Install the package by running the **$CS_TOP/patch/115/sql/cskbctxs.pls** and **cskbctxb.pls** scripts. Use the parameters as documented in the scripts and then rebuild the index.

**When performing search on Oracle Knowledge Management from integrated module, I am not brought to the** Advanced Solution Search page.

The profile **Knowledge: Search to display for integrating applications** controls the search to perform from integration. The setting is the Simple Search.

**When performing** Advanced Solution Search on Oracle Knowledge Management from Oracle Service, Notes component of the service requests do not appear.

Verify the profile **Knowledge: Pass all mapped notes to KM for solution searching and authoring**.

**In Oracle TeleService, after I click the Yes button for "Is this solution useful in resolving your question or problem?" and after I click the Refresh button on the Oracle TeleService Workbench tab, the solution does not appear in the** Notes and Knowledge section and the row is not being added to the CS_KB_SET_ LINKS table.

Verify that the profile option Knowledge: Action for Positive Solution Feedback is set up to link solution as solved.

Also, clear the IBU and CS caches and bounce the server.

# Authoring Related Problems

**I have created a Solution Type, but when I create a solution it does not appear on the Solution Type list?**

You must associate at least one Statement Type to your Solution Type. A Solution Type without an associated statement is incomplete and is not available to choose from the Solution Type list when a user creates a new solution.

**The** Rich Text Editor does not appear.

Rich Text Editor does not appear on Create or Update Statement page even if I select **HTML** or **HTML with Autolink** content type.

Rich Text Editor works only under browser that supports IFRAMEs.

You need to turn **off** the OA Accessibility feature setting. The OA profile option is **Self Service Accessibility Features**.

**Can I reference image files in a statement?**

You can reference an image in a statement's details by copying the image from a Web page and pasting it in the statement details through the Rich Text Editor.

Uploading image from your desktop into the statement details is not supported.

**When are statements considered duplicate?**

A statement is considered duplicate if an existing Published statement already exists with the same summary, type, Visibility, and detail.

**How do I publish a statement?**

A newly created statement is in a Draft status by default. It is published when the solution for which it is initially created is published.

**Why can I not edit a statement in a published solution that I am able to** lock and update?

A published statement cannot be updated because different solutions can potentially shared the statement. Updating of the statement may not be valid for the context of all the solutions that are using this statement.

If you do want to update a statement, you can perform a statement global update. You must have been granted function CS_KB_GLOBAL_UPDATE_FN before you can perform this action. You can access this from the Statement Search page.

Alternatively, you can **copy as new** an existing statement to create a new statement based on the existing statement and make the corresponding change to the new statement.

**As a member of a resource group assigned to all steps in an authoring flow, how can I get an e-mail for a solution that I created and submitted to that** authoring flow?

To get an e-mail notification for a solution, you need to verify that:

- In the workflow user preference setup, HTML mail has been selected.

- You have subscribed to the products or categories related to the solutions that you are interested in from the Subscription window.

- Ensure that the notification mailer in your environment is working.

> **Note:** Users who have access to view the complete solution will receive notifications. The Security Setup for the user enables them to access both the solution and all its associated statements.

**How do I delete a solution?**

Deleting solutions is not allowed in Oracle Knowledge Management. You can perform a soft delete by creating an authoring flow to obsolete a solution.

**Where are the attachments to the solutions in Oracle Knowledge Management stored?**

Attachments to solutions in Oracle Knowledge Management are stored in the database through FND attachments. For more information on FND Attachments, see the *Oracle Applications System Administrator's Guide.*

**How is Multi Lingual Support (MLS) used in Oracle Knowledge Management?**

When you create a solution in one language, a copy of the solution is created in other languages that you have installed. If you assign the Publish status to any copy of the solution, then, the copy of the solution for other languages also gets published.

Hence, you need to verify that the solution is ready for all the installed languages before you put it in the publish state.

**Why do I see the following warning even if I do not select any Statement Type or Solution Type while creating a solution:**

"The statement types that follow are not compatible with the Solution Type that you have selected. Click the statement to modify its attributes."

All solutions and statements in Oracle Knowledge Management have to have a type. Statements without a type are considered as **not compatible**.

You have to update the statement to select a Statement Type. The warning goes away.

**I have text solutions created that are no longer aligned on the new Solution Details page.**

The profile **Knowledge: Character display format for Statement text** controls the Text content type style.

## Setup Related Problems

**Can I end-date a Solution Type?**

You can end-date Solution Type. End dating a Solution Type prevents any further solutions of this type from being created after the end-date has expired. Solutions currently in progress can complete. End dating does not delete the Solution Type from the database.

**I cannot find the request set "Knowledge Management: index synchronization set", nor the concurrent programs "Knowledge Management Statement Index Synchronization", and "Knowledge Management Category Index Synchronization".**

Verify that the request set and the concurrent programs have been assigned to your request group.

## Miscellaneous Problems

**I login from jtflogin, but Oracle Knowledge Management does not function properly.**

You need to use the Self-Service (e.g. PHP) login instead of the jtflogin to access Oracle Knowledge Management. Switching Responsibility from jtflogin will not resolve this issue.

**After installing the system, I cannot find user actions tracked on Service Requests.**

To turn on tracking:

- Set the profile **Knowledge: Time period (in seconds) for user activity log** to a valid positive number.

- Bounce Jserv after changing the value of the profile option.

- Execute the following queries to see the tracking history in the database:

  *select a.\*, b.\**

  *from cs_kb_sessions a, cs_kb_session_attrs b*

  *where a.session_id = b.session_id*

  *order by a.last_update_date desc*

- Verify the value of profile **Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation**.

**Buttons do not show up but appear as links**

Some buttons do not appear as buttons, but instead appear as links.

- Verify that the directory /OA_HTML/cabo/images/cache/en/ (xxx.gif) is writable. CABO generates buttons in that directory.

- Verify configuration of your X Server. See the X Server configuration chapter of the *UIX Developer's Guide*.

**Why is the text that I enter in the Statement Summary field saved as a JSP file on the hard disk when I click the Export button on the Statement Detail window?**

It is an Internet Explorer bug. You have to download and install a patch containing this fix from the Microsoft Web site.

# Part 4

## Integration of Oracle Products

This part contains the following chapter:

- Integration, page 8- 1

# 8

# Integration

This chapter covers the following topics:

- About this Chapter
- E-Business Suite Integration
- Additional Integration Setups

## About this Chapter

This chapter provides an overview and a list of all products with which Oracle Knowledge Management integrates. In addition, the chapter provides additional setup steps required for integrating with Oracle Knowledge Management.

## E-Business Suite Integration

Oracle Knowledge Management is a Web-based information management system that lets a user efficiently search, create, distribute, and manage information. For an end user, Oracle Knowledge Management is a self-service application in which they can enter natural language queries for retrieving and solving their own issues. A customer support agent can use Oracle Knowledge Management as a powerful solution management tool. Solutions created in Oracle Knowledge Management are available to users of all applications that integrate Oracle Knowledge Management, based on the security defined for the user. The availability of information at all times in organizations means quicker response for support calls with no long phone queue waits for the users. This enhances customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations.

The tight integration that Oracle Knowledge Management has with several Oracle products allows the users of these modules to leverage knowledge in the knowledge base to resolves issues.

Oracle Knowledge Management integrates with other Oracle modules, such as Oracle TeleService, Oracle Field Service, and Oracle Depot Repair. This integration lets service agents for these modules access to solutions.

Oracle Knowledge Management also integrates with Oracle iSupport, which lets users of Oracle iSupport resolve their own service issues.

Topics in this section include:

- Forms-Based Applications, page 8- 2
- HTML-Based Applications, page 8- 3

# Forms-Based Applications

When coming from agent integration flow, such as Service Request or Depot Repair, users can choose between Simple Search and Advanced Solution Search by setting the **Knowledge: Search to display for Integrating Applications** profile option. This profile's seeded value for the default search mode is Simple Search, which provides a more basic mechanism to search for solutions. The ability to search for service requests in Simple Searches also helps the agent to use the knowledge from previously resolved issues.

Forms-based applications that integrate with Oracle Knowledge Management include:

- Oracle TeleService, page 8- 2
- Oracle Field Service, page 8- 3
- Oracle Depot Repair, page 8- 3

### Oracle TeleService

Oracle TeleService (Support module) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. Oracle TeleService uses Oracle Knowledge Management to leverage a knowledge base of previously reported problems and solutions. As users log new service requests, agents can search the knowledge base to identify existing solutions that can resolve customer issues or contribute new solutions to the knowledge base. A user can navigate from the View Service Request Form to the Search window of Oracle Knowledge Management. The Notes component in a service request documents the description and progress being made in resolving a customer issue. Notes can provide details to search the knowledge base for solutions and statements. You can link a solution that was created in Oracle Knowledge Management to a Service Request. You can use Notes to create new statements that contribute to the knowledge base. An agent uses certain Note Types for searching the knowledge base and creating solutions. Examples of Note Types to use for searching include: Symptom, Cause, Action, Problem, and Solution.

> **Note:** You can use as search criteria only those Note Types that you have mapped to Statement Types.

The following information from the service request are passed to the Solution Search page:

- Service Request summary defaults to the key words for searching.

- For Solution Advanced Solution Search only, if your note was saved in the service request using a Note Type that has been mapped to a Statement Type in Oracle Knowledge Management, then the note text is passed over if user is using Solution Advanced Solution Search to perform the searching.

- Product (if this has not been personalized to be hidden on the Oracle Knowledge Management window).

You can view the details of all solutions found in the search and select the solutions that are useful for the resolving of your service request. You can also link relevant solutions to your service request.

As part of TeleService, Oracle Customer Management Contact Center users can also navigate to Oracle Knowledge Management through integration flows and achieve similar functionality as the preceding information mentions.

For more information, see the *Oracle TeleService User Guide*.

### Oracle Field Service

The Oracle Field Service suite supports an automated process that service organizations use to manage their field service operations. It assists in the entire service process from taking the customer call to fixing and reporting on the problem at a customer site. The Oracle Field Service suite offers a range of products to meet an organization's business needs.

The Oracle Field Service module assists in assigning tasks to service representatives, creating and dispatching daily schedules, and monitoring progress.

A support agent analyzes service requests. The support agent searches Oracle Knowledge Management for a solution and creates a task based on the problem description and action needed to solve the problem.

For more information, see the *Oracle Field Service User Guide*.

### Oracle Depot Repair

Oracle Depot Repair tracks and manages the repair process in a service organization. This module reduces customer downtime while the product is being repaired.

Oracle Knowledge Management allows an agent in Oracle Depot Repair to review the full problem solution life span, starting from the initial diagnosis of a problem to problem resolution. A depot agent can search for a solution for a repair order by navigating to the Search window. Product and work summary of the repair order appear in the Solution Basic Search or the Advanced Solution Search window.

For more information, see the *Oracle Depot Repair User Guide*.

## HTML-Based Applications

HTML-based applications that integrate with Oracle Knowledge Management include:

- Oracle iSupport, page 8- 3
- Oracle eMail Center, page 8- 7
- Oracle Partners Online, page 8- 8

### Oracle iSupport

Topics for Oracle iSupport integration with Oracle Knowledge Management include:

- About Oracle iSupport, page 8- 3
- Usage Recording, page 8- 4
- End User Flows, page 8- 4
- Set Up Guest Users, page 8- 6
- Functions for Configuring Oracle iSupport Pages, page 8- 7

**About Oracle iSupport**

Oracle iSupport is a customer service portal that allows both customer and employee users of a service organization to resolve their issues themselves and to receive assisted service over the Internet. It enhances customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations.

Oracle iSupport integrates with Oracle Knowledge Management to search for published solutions. A service request agent using Oracle iSupport can search for solutions while

creating a service request. Oracle iSupport customers can also search Oracle Knowledge Management to find solutions without waiting for a service agent's assistance.

In the Create Service Request flow, an Oracle iSupport administrator can enable or disable the step of searching the knowledge base. For more information, see the *Oracle iSupport Implementation and User Guide.*

An Oracle iSupport user can search and view a solution by either clicking the Support tab or by clicking the **Find a solution link** on the iSupport Home page. He or she can also navigate to a solution listed in the Common Problems and Recommended Solutions section. The Solution Details appear. A user can provide feedback on the solution by selecting **Yes** or **No** for the feedback section. He or she can also click the **Add to Quick Links** hyperlink or click the Create Service Request button to navigate to Create Service Request window.

**Usage Recording**

When users access Oracle Knowledge Management from iSupport, Oracle Knowledge Management tracks their searches, solution viewing, and feedback actions.

When users navigate from Oracle Knowledge Management to create a Service Request, the system records their tracked actions:

- The search key words that you use automatically appear in the summary of the Create Service Request page.

- Depending on profile **Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation** setting, the system records the viewing history and feedback on the Service Request. For more information, see the *Oracle iSupport Implementation and User Guide*.

The **Knowledge Management Calculate Solution Usage Score** concurrent program calculates the usage score.

The **Knowledge: Time period (in seconds) for user activity log** profile option enables solution usage recording for iSupport. The profile option defines the time frame within which the user activity tracking runs. By default, the time is 0, which means that no solution usage tracking occurs. Note that this profile does not control how the system stores the data in the service request.

The **Oracle iSupport: Option to Track Solutions Viewed During Service Request Creation** profile controls how the data storage occurs. For more information, see the *Oracle iSupport Implementation and User Guide*.

You can also enable this solution usage recording for Partners Online if you set the profile the respective levels.

**Purge Unused Tracking History Data**

When you enable the solution tracking feature, the system records data by each use of iSupport. Overtime, the tracked data can become very large. You should consider running the **Knowledge Management purge tracking history** concurrent program to purge the outdated data to improve the performance.

**End User Flows**

End users--such as customers who search the knowledge base--access Oracle Knowledge Management through the Support tab in Oracle iSupport. Tasks that end users typically perform include:

- Conducting a Simple Search, page 8- 5

- Browsing Solution Categories, page 8- 5
- Viewing Top Solutions in Oracle iSupport, page 8- 6

The following flow diagrams show end-user processes.

**Conducting a Simple Search**

The majority of end users searching the knowledge base conduct a key word search using the Simple Search functionality. The following figure, **Conducting a Simple Search**, shows the tasks that you use to conduct a Simple Search.

inserted figure title **Conducting a Simple Search**

*Conducting a Simple Search*
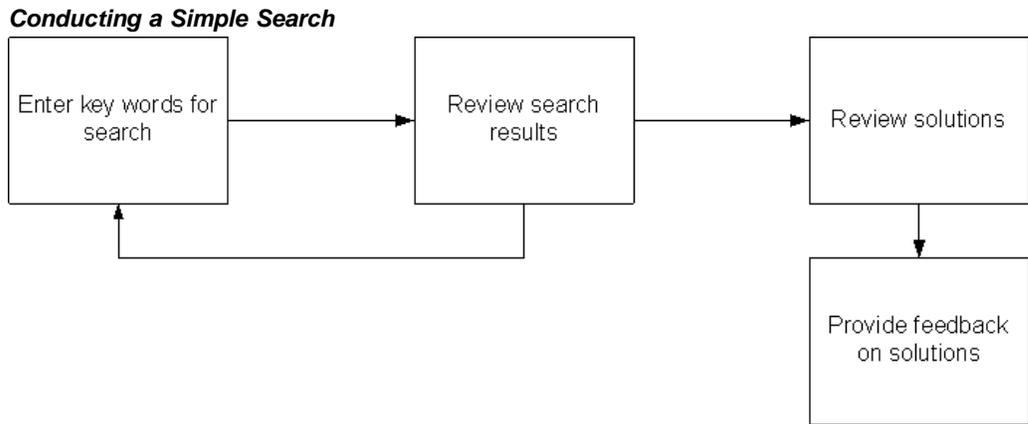


Conducting a Simple Search involves:

- **Entering key word for search**: Enter a key word or words.

- **Reviewing search results**: Review search results and decide whether or not to modify the search by entering new key words.

- **Reviewing solutions**: Review solutions that appear in the search results.

- **Providing feedback**: Indicate whether a solution helps to solve your problem by clicking a response at the bottom of the Solution Detail page. The system captures this information in usage counts that populate the Frequently Used Solutions list.

**Browsing Solution Categories**

From the Simple Search page, end users can browse Solution Categories that are similar to folders for solutions. The following figure, Browsing Solution Categories, page 8- 5 , is a flow diagram that shows the tasks that you use to browse Solutions Categories.

inserted figure title **Browsing Solution Categories**

*Browsing Solution Categories*
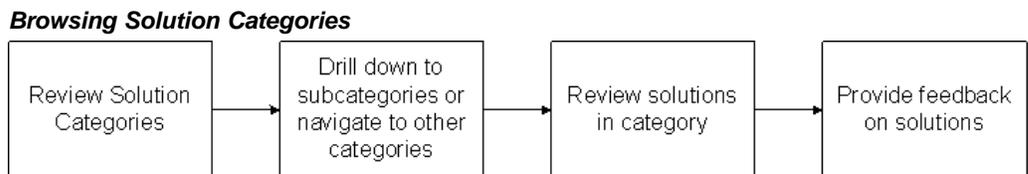


The tasks to browse Solution Categories include:

- **Reviewing Solution Categories**: Review Solution Categories to determine where you might find solutions that meet your needs.

- **Drilling down to subcategories or navigate to other categories**: Choose a subcategory or another category.

- **Reviewing solutions in category**: Review solution headers and detail to find an appropriate solution.

- **Providing feedback on solutions**: Indicate whether a solution helps to solve your problem by clicking a response at the bottom of the Solution Detail page. The system captures this information usage counts that populate the Frequently Used Solutions list.

### Viewing Top Solutions in Oracle iSupport

Users can navigate to a list of Recommended Solutions and Frequently Used Solutions from the Top Solutions subtab in Oracle iSupport. The following figure, Viewing Top Solutions in Oracle iSupport, page 8- 6 shows the tasks that you use to view Top Solutions in Oracle iSupport.

*Viewing Top Solutions in Oracle iSupport*
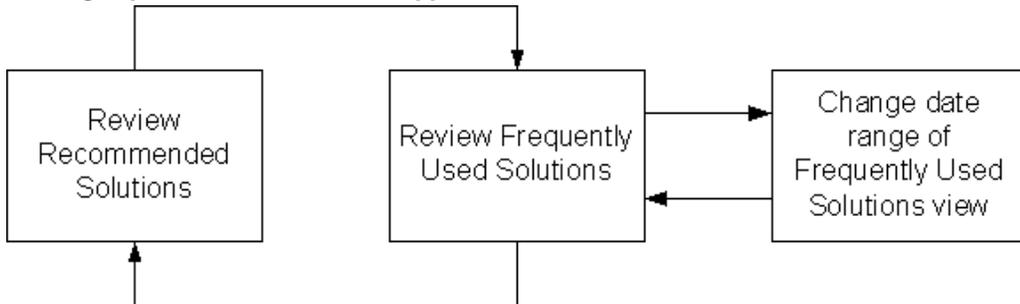


Oracle iSupport users can navigate to the Top Solutions tab to review the following lists of solutions:

- **Recommended Solutions**: View a list of recommended solutions. The Recommended Solutions list is a list of solutions that the Knowledge Administrator chose to appear in Oracle iSupport.

- **Frequently Used Solutions**: View a list of frequently used solutions. The basis of the Frequently Used Solutions list is usage counts. Users can filter the Frequently Used Solutions by specifying the date range.

### Setting Up Guest Users

The Guest User concept allows unregistered or registered users to access certain features in Oracle Knowledge Management without having to log in.

> **Note:** Oracle iSupport provides Guest User support for Oracle Knowledge Management.

A Guest User is a user who comes to the site and does not log in explicitly, but implicitly to the applications to use certain functionality. The Oracle Knowledge Management Guest User can use the following pages at specified locations (URLs) without explicitly logging in to applications:

- Simple Search page and Browsing page

- Search Result pages

- View Solutions Detail page

When a registered user has not logged in to the applications, but uses the URL to open any of the preceding pages, the module displays the page in Guest User mode, with the Login icon. Users can log in to see pages for their respective role and permission.

For more information, see the *Oracle iSupport Implementation Guide*.

**Functions for Configuring Oracle iSupport Pages**

When the profile **Oracle iSupport Page Level Configuration Option** is **on**, you can configure the high-level look and feel of the user interface (UI) for the Browser, Search Results, and Solution Details pages that appear in Oracle iSupport by defining the appropriate JSP name in the following FND functions:

- **Top**: Indicates that the JSP appears at the top of the content page.

- **Left**: Indicates that the JSP appears at the left of the content page.

- **Right**: Indicates that the JSP appears at the right of the content page.

- **Bottom**: Indicates that the JSP appears at the bottom of the content page.

For more information, see the *Oracle iSupport Implementation Guide*.

**Browse Pages Functions**

- **CS_KB_BROWSE_TOP_FN**: Top section of Browse page

- **CS_KB_BROWSE_LEFT_FN**: Left section of Browse page

- **CS_KB_BROWSE_RIGHT_FN**: Right section of Browse page

- **CS_KB_BROWSE_BOTTOM_FN**: Bottom section of Browse page

**Search Pages Functions**

- **CS_KB_SEARCH_RESULT_TOP_FN**: Top section of Search Result page

- **CS_KB_SEARCH_RESULT_LEFT_FN**: Left section of Search Result page

- **CS_KB_SEARCH_RESULT_RIGHT_FN**: Right section of Search Result page

- **CS_KB_SEARCH_RESULT_BOTTOM_FN**: Bottom section of Search Result page

**Solution Detail Functions**

- **CS_KB_SOLN_DETAIL_TOP_FN**: Top section of Solution Detail page

- **CS_KB_SOLN_DETAIL_LEFT_FN**: Left section of Solution Detail page

- **CS_KB_SOLN_DETAIL_RIGHT_FN**: Right section of Solution Detail page

- **CS_KB_SOLN_DETAIL_BOTTOM_FN**: Bottom section of Solution Detail page

### Oracle eMail Center

Oracle eMail Center is the module for managing inbound e-mail interactions with customers, partners, suppliers, employees, and others that interact with an organization. Oracle eMail Center provides an agent with tools and capabilities to maximize their productivity and effectiveness.

Oracle Knowledge Management integrates with Oracle eMail Center during inbound e-mail processing. Oracle eMail Center agents can search Oracle Knowledge Management for appropriate solutions while responding to an e-mail. The agents can send the searched-for solutions as an e-mail message to the customer.

For more information, see the *Oracle eMail Center User Guide*.

### Oracle Partners Online

Oracle Partners Online is the entry point for Partner Relationship Management (PRM) services across the pre-sales, sales and post-sales inter-company processes for companies and their partners. These services include:

- Partner profiling and opportunity matching for the vendor

- Online access to latest product collateral in addition to sales and service support for the partners.

Users of Oracle Partners Online can access the Support tab in Oracle iSupport. For more information, see the *Oracle Partners Online User Guide* and the *Oracle iSupport User Guide*.

# Additional Integration Setups

The following procedure uses the integration points in the Oracle E-Business Suite:

- Map a Statement Type to a Note Type, page 8- 8

## Map a Statement Type to a Note Type

The Notes component is a Common Application Component within the Oracle E-Business Suite. The Notes component includes a seeded set of defined Note Types that you can use throughout the Oracle E-Business Suite. Individuals with the CRM Administrator Responsibility can also create additional customized Note Types.

You use Notes in a Service Request to document the description and progress made in resolving customer issues. The Notes component captures details that you can use to search the knowledge base for solutions or to create new solutions. For more information, see *Oracle TeleService User Guide*.

You can map a Note Type to a Statement Type. Although it is possible to set up a multiple-to-multiple mapping relationship between Note Type and Statement Type, one-to-one mapping is highly recommended.

You use this mapping to translate Notes from other objects, especially service requests, into Statement Types in Oracle Knowledge Management.

This integration is primarily used with Oracle TeleService.

**Responsibility**

Knowledge Administrators with edit permission (CS_Type_Edit) can relate a Statement Type to a JTF Note Type.

**Prerequisite**

None

**Steps**

1. Create a new Statement Type or navigate to an existing Statement Type.

2. In the Related section, choose External Links from the list.

3. Click Add.

   The Select an External Object window appears.

4. Click Note Type.

   The Note Type window appears.

5. Search for the Note Type that you want to add to this Statement Type.

   **Tip**: Use (%) in Description field for a wildcard search.

6. From the Search Results choose the JTF Note Type to add to the Statement Type.

7. Click Update.

# A

# Roles and Permission

This appendix covers the following topics:

- Roles
- Permission

## Roles

CS_SYSTEM_ADMIN is the only role in Oracle Knowledge Management. This is a required role that you assign to users who are Oracle Knowledge Management system administrators. For other Oracle Knowledge Management users, see Access Control, page 3- 1 to set up the access.

For users, such as customers, refer to the *Oracle iSupport Implementation and User Guide* for the roles to use.

For information on permission that Oracle Knowledge Management uses, see Permission, page A- 1 .

## Permission

The following table, page A- 2 shows Oracle Knowledge Management's permission names and descriptions.

*Oracle Knowledge Management Permission*

| Permission | Description |
| --- | --- |
| CS_Advanced_Search | Knowledge: Search: Permission to view the Oracle Knowledge Management Advanced Solution Search window |
| CS_Solution_View | Knowledge: Search: Permission to view solution |
| CS_Solution_View_Internal | Permission to see the comments of the solutions. |
| CS_Assoc_Ext_Obj_To_Sol | Knowledge: Authoring: Permission to attach external objects to a Statement Type. |
| CS_Solutions_Comments_Add | Knowledge: Authoring: Permission to add solution comments |
| CS_Freq_Used_Def_View | Knowledge: Setup: Permission to view frequently used solution definitions |
| CS_Freq_Used_Def_Update | Knowledge: setup: Permission to update frequently used solution definitions |
| CS_Types_View | Knowledge: Setup: Permission to view Solution and Statement Types setup windows |
| CS_Types_Edit | Knowledge: Setup: Permission to edit solution and Statement Types |
| CS_Workflow_Setup_Update | Knowledge: Setup: Permission to update solution authoring workflow setup |
| CS_Worflow_Setup_View | Knowledge: Setup: permission to view solution authoring workflow setup windows |

# B

# Profile Options

This appendix covers the following topics:

- About this Appendix
- Before You Begin
- Overview of Setting Profile Options
- Set Up Profile Options
- List of Profile Options

## About this Appendix

This appendix describes the profile options that are required for the successful implementation of Oracle Knowledge Management.

## Before You Begin

Before doing Oracle Applications Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them by changing to *$COMMON_TOP/admin/scripts*, and executing *adcmctl.sh <APPS username/APPS password> start*.

## Overview of Setting Profile Options

As a System Administrator, you can use the System Profile Values window in Oracle Applications Forms to set up profile options for your user community. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities, and bounce the apache server. When you set up a user profile, you provide Oracle Applications with standard information (such as printer) that describes a user, Responsibility, application, or site. You can set up values for user profile options at each of the following **profile levels**.

- **Site**: Option settings pertain to all users at an installation site.
- **Application**: Option settings pertain to all users of any Responsibility associated with the application.
- **Responsibility**: Option settings pertain to all users currently signed on under the Responsibility.

- **User**: Option settings pertain to an individual user, identified by their application user name.

The values you set up at each level provide run-time values for each user's profile options. An option's run-time value becomes the highest level setting for that option.

When you can set a profile option at more than one level, the priorities from lowest to highest are:

- Site has the lowest priority.

- Application supersedes Site.

- Responsibility supersedes Application.

- User has the highest priority.

For example, values at the Application, Responsibility, or User levels can override a value at the Site level. A value at the User level has the highest priority and overrides values at any other level.

For example, for a given user, assume the printer option is set only at the Site and Responsibility levels. When the user logs on, the printer option assumes the value set at the Responsibility level, since it is the highest level setting for that option.

> **Note:** As a System Administrator, you should set site-level option values before specifying profile options at the other levels after the installation of Oracle Applications.

The options specified at the site-level work as defaults until the same options are specified at other levels. Application users can use the Personal Profile Values window to set their own personal profile options at the user level. Not all profile options are visible to users. End-users might not be able to update some visible profile options. For more information about profile options, see the *Oracle Applications System Administrator's Guide*.

# Set Up Profile Options

The following procedure describes how to set up any profile option.

**Module**

Oracle Applications Forms

**Responsibility**

System Administrator Responsibility

**Prerequisite**

None

**Navigation**

Profile > System...Find System Profile Values window

**Steps**

1. Select the levels at which you want to set the profile option. The available levels include:

   - Site.

- Application: If you select this level, then choose the Application for which you want to set the profile option.

- Responsibility: If you select this level, then choose the Responsibility for which you want to set the profile option.

- User: If you select this level, then choose the User for whom you want to set the profile option.

2. In the Profile field, enter the profile name, such as Knowledge: Active Knowledge Base System, or a wildcard search criterion such as Knowledge%.

3. Click Find.

   The System Profile Values form displays the results of your search.

4. Verify or set the profile option(s) at the levels that you selected.

## List of Profile Options

The following table, *Oracle Knowledge Management Implementation Guide* shows the Profile Options that are available in Oracle Knowledge Management.

*Profile Options for Oracle Knowledge Management*

| User_Profile_Option_Name | Description | Default Profile Value |
|---|---|---|
| Knowledge: Action for Negative Solution Feedback | Determines what action to take for Solutions that are linked in a negative status. | Link Solution as Not Solved |
| Knowledge: Action for Positive Solution Feedback | Determines what action to take when Solutions are considered to be Useful. | Link Solution as Solved |
| Knowledge: Assigned Category Security Group | Determines the Category Security Group that a user can access. You can set this profile option up to the Responsibility level. This profile controls which categories, and therefore solutions, that the user can access. The possible values for this profile depend on the Category Security Groups that the administrator defined in the Setup windows. | Default Category Group |

| User_Profile_Option_Name | Description | Default Profile Value |
|---|---|---|
| Knowledge: Assigned Visibility Level | Indicates the most restrictive Visibility of solutions or categories that a user can access. You can set this profile option up to the Responsibility level. Visibility is an indication of the sensitivity of the content. The possible values for this profile depend on the Visibilities that the administrator defined in the Setup windows. The seeded values are External and Internal. | See Security Settings, page 4-13 for seedings at different application and Responsibility levels. |
| Knowledge: Assigned Statement Visibility Level | Indicates the most restrictive Visibility of statements that a user can access. You can set this profile option up to the Responsibility level. Statement Visibility is an indication of the sensitivity of the statement content. The possible values for this profile are External or Internal. | See Security Settings, page 4-13 for seedings at different application and Responsibility levels. |
| Knowledge: Batch size of solutions to index | Determines how many solutions it should synchronize at one time. | 300 |
| Knowledge: Category assigned to Solutions created through third party application | Category assigned to solutions that were created through the API **CS_KNOWLEDGE_PUB. Create_Set_And_Elements**. | |
| Knowledge: Character display format for Statement text | Specifies the font style (class name of the style sheet) for text content type data, which includes both Text type and Text with AutoLink type. Applies only to statement details. Allows setting the text data to render in the same style as HTML data. | OraFieldText |
| Knowledge: Concurrent Search Mode for Simple Search | Sets Simple Search to search all repositories concurrently if set to **Yes**.<br><br>Recommended setting for this profile is **Yes**.<br><br>Applies only to customer pages. | Yes |
| Knowledge: Default Authoring Flow | Sets the default authoring flow to which solutions are submitted. | |

| User_Profile_Option_Name | Description | Default Profile Value |
| --- | --- | --- |
| Knowledge: Default Product Category Set | Determines the Product Category set used from Inventory. | |
| Knowledge: Default Searching Method | Sets the default searching method in the Simple Search and Advanced Solution Search. The Possible Values for the Searching methods are: All of the Keywords, Any of the Words, and Exact Phrase. | Any of the Words |
| Knowledge: Default Solution Type for Authoring | Sets the default Solution Type used in Solution authoring. | Symptom Cause Action |
| Knowledge: Default Solution Visibility Level | Stores the default solution Visibility when users create a new solution. If the user's assigned Visibility is not as restrictive as the default in this profile, the most restrictive Visibility that the user can access is used instead. | External |
| Knowledge: Default Statement Content Type | Stores the default statement content type when users create a statement. By default, this is HTML type, and the Rich Text Editor should appear on the Create Statement page. The lookup type CS_KB_CONTENT_TYPE defines the possible values. | HTML |
| Knowledge: Default Statement Visibility Level | Sets the default Visibility when you create a new statement. Formerly known as Knowledge: Default Distribution Level. | External |
| Knowledge: Display Platform Attributes throughout Knowledge Management | Controls if platform attribute appears on the View Solution and Advanced Solution Search pages. Applies only to customer pages.<br><br>**Note**: In agent pages (OA), you control this through Personalization. | Yes |

| User_Profile_Option_Name | Description | Default Profile Value |
|---|---|---|
| Knowledge: Display Product Search Criteria | Controls display of the product criteria. Can display product name or description in the format of a list of values or a list. Applies only to customer pages.<br><br>**Note**: In agent pages (OA), you control this through Personalization. | Name |
| Knowledge: Display Quick Find | Controls whether or not the Quick Find bar appears in Oracle Knowledge Management.<br><br>Applies only to customer pages. | No |
| Knowledge: Display Search Related Solutions button on advanced solution | Controls whether or not the Search Related Solutions button appears in the Advanced Solution Search. Applies only to customer pages.<br><br>**Note**: In agent pages (OA), you control this through Personalization. | No |
| Knowledge: Display search results above the score | Filters search results that are below this score. Applies to the Simple Search and Advanced Solution Search. List of values includes: 1, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100. | 1 |
| Knowledge: Display "Using" search option on advanced solution Search | Controls whether or not the Using search options appears in the Advanced Solution Search. Applies only to customer pages.<br><br>**Note**: In agent pages (OA), you control this through Personalization. | No |
| Knowledge: Display "Using" search option on simple search | Controls whether or not the Using option appears in the Simple Search. Applies only to customer pages.<br><br>**Note**: In agent pages (OA), you control this through Personalization. | Yes |
| Knowledge: Filter solutions with no product association from search results | Controls whether the system filters from the search results solutions that have no associated product. | No |

| User_Profile_Option_Name | Description | Default Profile Value |
|---|---|---|
| Knowledge: Index Content As Soon As Possible | Allows updated solutions or statements to be searchable within a short time after they are created or updated. | No |
| Knowledge: Ignore word match frequency in solution search results | Turns on the feature to ignore the word frequency in score calculation. | Yes |
| Knowledge: Index Content As Soon As Possible | Allows updated solutions or statements to be searchable within a short time after creation or being updated. | No |
| Knowledge: Maximum number of search results to display | Defines the maximum number of search results to appear in the search results. Replaces the profile option Knowledge: Knowledge Base Search: Maximum Number of Search Results. | 200 |
| Knowledge: Pass all mapped notes to KM for solution searching and authoring | Determines whether or not to automatically pull notes that are mapped to valid Statement Types when a user navigates to Advanced Solution Search or Create Solution from the Simple Search during an integration flow. | Yes |

| User_Profile_Option_Name | Description | Default Profile Value |
| --- | --- | --- |
| Knowledge: Percentage of usage weighting in solution search result score | Defines how much the usage score should contribute to the displayed score. The default value is 0, which means that the usage score is not included in the score calculation.<br><br>Textual relevance always determines the search results first. The process then takes and re-sorts the top-scoring (pure text score) X documents--where X is a number that the profile Knowledge: Maximum number of search results to display determined.<br><br>Only the second re-sorting considers the Usage Score weight percentage. It is recommended to use a small single-digit percentage value for this profile. The process uses the value to differentiate search results having the same textual score. In combination, the process may typically use this value when you have turned on the **Knowledge: Ignore word match frequency in solution search results** profile option. | 0 |
| Knowledge: Repositories to search across in simple search | Specify repositories to use in Simple Searches. Controls only customer pages. | Solutions, Forums |

| User_Profile_Option_Name | Description | Default Profile Value |
| --- | --- | --- |
| Knowledge: Search results score includes weighting from Product, Platform and category filters | Turning on this feature causes search criteria to not act as strict filters. Some search results might not match all of the specified criteria. Be aware that this profile impacts all the searches in Oracle Knowledge Management, including Simple Search.<br><br>For example when you turn on this feature, searches that have specific product criteria will have search results that may not be linked to the selected product. However, the results that are linked to the product appear before the ones that are not related to the product.<br><br>If this profile is turned on, the search ignores the value set in the following profile: **Knowledge: Filter Solutions with no product association from search results**. | No |
| Knowledge: Search to display for integrating applications | Stores the search (Simple Search or Advanced Solution Search) to which users want to go from integration. Controls only agent (OA) pages. The lookup type CS_KB_UN I_ADV_SRCH defines the possible values. | Simple Search |
| Knowledge: Select Authoring Flow | Controls whether user can select an authoring flow to submit the solution to during the solution authoring process.<br><br>If this value is **No**, then the user cannot pick a flow, and the system sends all submissions to the default flow that the profile option Knowledge: Default Authoring Flow specifies. | Yes |
| Knowledge: Simple Search repository key | Stores the key that contains the settings of the Simple Search repositories. Controls only agent (OA) pages. | CS_KB_REPOSITORY_LIST |
| Knowledge: Starting Category for Browsing Solutions | Specifies the default category for browsing when a user logs in. Applies to both agent and customer facing pages. | |

| User_Profile_Option_Name | Description | Default Profile Value |
|---|---|---|
| Knowledge: Statement display order on solutions details | Controls the display of statements by either the order of creation or grouping by Statement Type. | Position Order |
| Knowledge: Time period (in days) for solution usage aging | Defines the time frame within which the different factors for solution usage would be used for usage score calculation. | 365 |
| Knowledge: Time period (in seconds) for user activity log | The time window to record user activity in Oracle Knowledge Management. A value of 0 indicates disabled tracking. | 0 |
| Knowledge: Token used for "Ignore match frequency" profile option | Stores the nonexistent key word.<br><br>**Important!** You should not change this value. | "zyzyzy" |
| Knowledge: Trim extremities of usage score | Defines the confidence interval of all age-adjusted usage scores at a given critical value.<br><br>**Important!** You should not change this value. | 1.92 |

# C

# Lookup Types

This appendix covers the following topics:

- About this Appendix
- List of Lookup Types
- Query and Edit Lookup Types

## About this Appendix

This appendix describes how to query and configure lookup codes to Lookup Types in Oracle Applications Forms.

## List of Lookup Types

The following table, page C-1 lists the lookup types, tasks, and descriptions for Oracle Knowledge Management.

*Lookup Types*

| Lookup Type | Task | Description |
| --- | --- | --- |
| CS_KB_STATUS | Configure the Solution Authoring Flow Status | The CS_KB_STATUS lookup type is a fully customizable lookup type for Oracle Knowledge Management. You can add lookup codes to this lookup type. You can add or delete steps, or change the name of the existing steps. Upon searching this lookup type, a list of steps for solution authoring flows appear that you can enable. **Important!** Use this lookup to configure authoring flow **step**, *not* the **status**. |

| Lookup Type | Task | Description |
|---|---|---|
| CS_KB_SEARCH_TYPE_OPT IONS | Configure the Search Method | You can configure the search methods in the Simple Search and the Advanced Solution Search windows. **CS_KB_ SEARCH_TYPE_OPTIONS** is the lookup that contains a list of lookup values that represent the different search options. Administrators determine whether or not to make the search values in this lookup available and also to rename the search options to be available in the Simple Search and the Advanced Solution Search windows. You must make enable at least one search method.<br><br>The Search results show a list of search options. In the Enabled column, select the check boxes to specify the search type. |
| CS_KB_RTE_FONT_COLOR | Configure the Font Color for Rich Text Editor | The CS_KB_RTE_FONT_ COLOR lookup type lets you specify the font colors to use in the Rich Text Editor. This lookup type is user definable.<br><br>The Search results show a list of font colors that users can choose when using the Rich Text Editor. The user can enable or disable the defined values or add more to the list. |
| CS_KB_RTE_FONT_LIST | Configure the Font List for Rich Text Editor | The CS_KB_RTE_FONT_LIST lookup type lets you can specify the available fonts from which users can choose when using the Rich Text Editor. This lookup type is user definable.<br><br>The Search results show a list of fonts that users can choose when using the Rich Text Editor. The user can enable or disable the defined values or add more to the list. |

| Lookup Type | Task | Description |
|---|---|---|
| CS_KB_USAGE_TYPE_WE IGHT | Configure the Usage Type Weighting for Search Effectiveness | The CS_KB_USAGE_TY PE_WEIGHT lookup type provides a way for customers to instruct the system on how to compensate the usage score for a solution that has links to external objects and has received the user's feedback. |
| | | This Usage Type Weight list is not extensible for the user, although the user can adjust the weighting. |
| | | The Search results show a list of the weighting. |
| CS_KB_SCORE | Configure the Usage Type Weighting for Search Effectiveness | The CS_KB_SCORE lookup type lists the available values for the Search Relevancy. In Search the profile Knowledge: Display search results above the score controls the results. This lookup defines the available values for this list. |
| | | This lookup type is user definable. |
| | | The Search results show a list of scores. You can enable or disable the defined values or add more to the list. |

## Query and Edit Lookup Types

The following procedures describe how to query and edit lookup types.

**Responsibility**

Service

**Login**

Log in to Oracle Applications Forms.

**Steps**

1.  Log in to Oracle Applications Forms as a System Administrator.

    The Responsibilities form appears.

2.  Switch the Responsibility to the **Service** Responsibility.

3.  Navigate to Others > Service: Lookup.

    The Oracle Service Lookups Form appears.

4.  From the View menu, choose Find.

    The Lookup Types window appears.

5.  In the Find field, enter the Lookup Type name and click OK.

The search results vary according to the lookup type. The Lookup Types, page C- 1 table shows some lookup types and descriptions, which include what you can change.

> **Note:** To search for all Oracle Knowledge Management lookup types, enter **CS_KB**.

6. Click OK.

7. In the Enabled column, specify your changes.

8. From the File menu, choose Save.

# D

# Concurrent Programs

This appendix covers the following topics:

- List of Concurrent Programs

## List of Concurrent Programs

The following table, *Oracle Knowledge Management Implementation Guide* shows the Concurrent Programs of Oracle Knowledge Management.

***Oracle Knowledge Management Concurrent Programs***

| Concurrent Program Name | Description |
|---|---|
| Knowledge Management Calculate Solution Usage Score | Calculates the usage score of solutions for the Search Effectiveness Module. |
| Knowledge Management Category Index Synchronization | Synchronizes the Category Oracle Text index to enable Categories to be Searchable. |
| Knowledge Management Forum Messages Index Synchronization | Synchronizes the Forums Oracle Text index to enable Forums to be Searchable. |
| Knowledge Management Purge Tracking History | Purges temporary data stored in Oracle Knowledge Management tracking history. |
| Knowledge Management Solution Export Program | Exports solutions from Oracle Knowledge Management using the user specified criteria. The process saves the results in XML format in the concurrent programs **out** file. This concurrent program downloads the solutions based on the following criteria:<br><br>• The category name from which the solutions must be downloaded.<br><br>• The status of all the solutions in a category, for example, **Published** or **All**. |

| Concurrent Program Name | Description |
| --- | --- |
| Knowledge Management Solution Import Program | Imports new solutions and updates existing solutions in Oracle Knowledge Management. It is a Java concurrent program that can upload multiple solutions. The solutions to be imported can either be new solutions or existing solutions with updates. This program uses the input XML file name (absolute path) and commit interval (how often to commit the import) parameters for running. The file must contain the solutions in a XML format and must be compliant with the Document Type Definition (DTD) for Oracle Knowledge Management, **cskb_solution.dtd**. This program verifies the validity of the input XML document. Each new solution to upload can either have a Saved status or be directly published, if the flow information is provided. Users can update only published solutions. These Solutions continue to have a Published status after the update. Attachments and external hyperlinks are not supported, but Statement Global Update is supported. Any statement with a statement number is globally updated according to the new data specified in the XML document. To see an example of a DTD file, see Sample File For Solution Import Program, page E- 1 . |
| Knowledge Management Solution Index Synchronization | Synchronizes the Solution Oracle Text index to enable Published Solutions to be Searchable |
| Knowledge Management Statement Cleanup | Obsoletes statements that are no longer associated to any solutions. This is a cleanup program to obsolete unused Statements. |
| Knowledge Management Statement Index Synchronization | Synchronizes the Statement Oracle Text index to enable Published Statements to be Searchable |
| Knowledge Management mark solutions for text re-indexing | Identifies and marks solutions for text re-indexing after security setup changes. After a Security change, such as adding a new Category to a Category Security Group, all solutions that are associated to the new Category require re-indexing to include this category. |

| Concurrent Program Name | Description |
| --- | --- |
| Knowledge Management unlock stuck solutions | Unlocks solutions that users, who no longer have access to the solutions, have locked. For example, if the Administration user changes the security setup, a Knowledge Worker who is working on a solution after the Security change may no longer have access to that solution. This program therefore identifies the solutions that users have checked out, who no longer have access to the solutions, and unlocks these solutions. |
| Knowledge Management update solution used count | This Program is used internally to count the number of times a solution receive feedback as to its usefulness |

### Index Management

Separate index synchronization programs are available for each index. The concurrent request set **Knowledge Management: index synchronization set** executes all the index synchronization programs at one time. A new parameter is available in each index synchronization program to allow building the index in parallel mode, which improves the efficiency of building the index. The index synchronization program includes the **DR build mode** that drops and recreates the Oracle Text index. This is a useful tool to use whenever index corruption occurs or when you need to recreate the index.

# E

# Sample File For Solution Import Program

This appendix covers the following topics:

- Example of a Solution File for the Solution Import Program

## Example of a Solution File for the Solution Import Program

The Oracle Knowledge Management Solution Import Program uses the input XML file name (absolute path) and commit interval (time intervals for committing the import) parameters for running. The file must contain the solutions in an XML format and must be compliant with the Document Type Definition (DTD) for Oracle Knowledge Management, `cskb_solution.dtd`.

The File must contain the solutions in a XML format and must be compliant with the Document Type Definition (DTD) for Oracle Knowledge Management (**cskb_solution.dtd**), which verifies the validity of the input XML document. If it is valid, the solutions are created, one after the other. If any data is invalid, the solutions are not created. If processing for a solution fails, its changes are rolled back, and a log error message is written, and the next solution in the file is imported. Each new solution to be uploaded can either have a Saved status or be directly published, if the flow information is provided. Users can update only published solutions. Attachments and external links are not supported but Statement Global Update is supported. Any statement with a statement number is globally updated according to the new data specified in the XML document.

For product and platform, you can optionally specify the segments attribute, which corresponds to the concatenated segments for that item. Once specified, the import program uses the **concatenated_segments** to lookup the item (product or platform) in the system item master. If not specified, import program still uses the content of the product or platform element as description to lookup in the system item master.

```
<?xml version="1.0"?>


<!DOCTYPE solution_list SYSTEM "cskb_solution.dtd">


<solution_list>


<solution>
```

```
<solution_type> Symptom Cause Action</solution_type>

<solution_visibility>External </solution_visibility>

<title>Maria's Test Solution 1 (mchui061902b)</title>

<category>Home&gt;12 World Cup&gt;United States</category>

<product segments="PBD-001" >Passport Backup Drive</product>

<product>Windows NT (wrong)</product>

<platform segments="SSD">Sentinel Standard Desktop</platform>

<statement>

<statement_type>Symptom</statement_type>

<statement_distribution>External</statement_distribution>

<content_type>HTML with AutoLink</content_type>

<summary>mchui061902b - symptom 1</summary>

<detail></detail>

</statement>

<statement_links>

<statement_no>10386</statement_no>

<statement_no>34</statement_no>

<statement_no>10650</statement_no>

</statement_links>
```

```
</solution>

<solution>

<flow>

<flow_name>Bayu Flow</flow_name>

Example of a Solution File for the Solution Import Program

Sample File For Solution Import Program E-3

<step>Public</step>

</flow>

<solution_type> Symptom Cause Action</solution_type>

<solution_visibility>External </solution_visibility>

<title>Maria's Test Solution 2 (mchui061902c)</title>

<category>Home&gt;New Category&gt;New Category 2</category>

<product>Windows NT</product>

<product>Windows NT</product>

<platform>windOWS 95</platform>

<statement>

<statement_type>Symptom</statement_type>

<statement_distribution>External</statement_distribution>

<content_type>Text with AutoLinks</content_type>
```

```
<summary>mchui061902c - symptom 1</summary>

<detail>another imported statement - published</detail>

</statement>

<statement_links>

<statement_no>10387</statement_no>

</statement_links>

<statement_link_update>

<statement_no_upd>10386</statement_no_upd>

<statement_type_upd>Symptom</statement_type_upd>

<statement_distribution_upd>Internal</statement_distribution_upd>

<content_type_upd>HTML</content_type_upd>

<summary_upd>update existing statement summary</summary_upd>

<detail_upd>global update of statement CLOB</detail_upd>

</statement_link_update>

</solution>

<solution>

<solution_number>10419</solution_number>

<solution_type> Symptom Cause Action</solution_type>

<solution_visibility>Limited</solution_visibility>
```

```
<title>UPDATED Solution 1000003 yes (updated on 062102)</title>

<category>Home&gt;New Category&gt;New Category 2</category>

<product>Windows NT</product>

<platform>windOWS 95</platform>

<statement>

<statement_type>Symptom</statement_type>

<statement_distribution>External</statement_distribution>

<content_type>Text</content_type>

<summary>create new statement </summary>

<detail>new statement details</detail>

</statement>

<statement_link_update>

<statement_no_upd>10386</statement_no_upd>
```

*Example of a Solution File for the Solution Import Program*

*E-4 Implementation Guide*

```
<statement_type_upd>Symptom</statement_type_upd>

<statement_distribution_upd>External</statement_distribution_upd>

<content_type_upd>Text with AutoLinks</content_type_upd>

<summary_upd>global update of statement</summary_upd>
```

```
<detail_upd>statement detail should be globally

updated</detail_upd>

</statement_link_update>

</solution>

</solution_list>
```

# Glossary

### Action

An Oracle Knowledge Management statement type that contains the solution to an issue. It is a part of the Symptom-Cause-Action solution type.

### Accumulate

This search finds documents that contain at least one of the query terms.

### Advanced Solution Search

Advanced Solution Search is a more comprehensive search than Simple Search. You can search for solutions under different categories, products, or platforms. You can search one solution type or all, and search for statements. You can also select an existing statement in Oracle Knowledge Management and perform a related search.

### All Keywords

This search uses the AND operator. The search results must match all terms in the query.

### Any Keywords

This search uses the OR operator. This search can match one or more query terms.

### Attachment

A link from a solution to a supporting item of information that enhances the value of the solution for its users. Attachments can include graphics, scripts, or documents in different file formats.

### Authoring Flow

An Authoring Flow defines the steps or tasks that a solution must follow in the solution approval or rejection process.

### Simple Search

Simple Search is a type of search that lets you search for a solution, category, and forum message based on a keyword.

### Boolean

In this searching method, you can enter your own Oracle Text operators. If you do not enter an operator, this search performs a phrase search.

### Category

A folder containing a set of related solutions.

### Cause

An Oracle Knowledge Management statement type that contains the reason for the solution issue. It is a part of the Symptom-Cause-Action solution type.

### Dynamic Linking

Is the process of linking an object type or a unique identifier within a statement as a link to additional information related to that object type or to that unique identifier.

### End Date

End-dating a statement or solution type prevents any further statements or solutions of this type from being created. Solutions or statements currently in progress are allowed to complete.

End dating a solution or statement type does not mean that the solution or statement type has been deleted. Instead, it is considered a **soft** delete that can be revoked by removing the end date on the solution or statement type at any point in time

### Find Related Statements

The search method that finds all other statements that have been previously linked. The results are displayed based on the strength or weight of the link.

### Find Similar Statements

A text search that finds matches that are determined by comparing keywords to the summary of the statements in the repository.

### Knowledge Base

The Oracle Knowledge Management database that contains information that can be used to solve issues.

### Knowledge Worker

An individual that creates or edits or technically reviews information within Oracle Knowledge Management.

### Merchant

A company that has purchased or is using one or more Oracle Applications modules.

### Oracle Text

Oracle Text is a feature that enables the Oracle database to store, manage, and retrieve text, documents, geographic location information, images, audio, and video in an integrated fashion with other enterprise information.

Formerly known as Intermedia Text.

### Relationship

A link between a solution to a statement or a statement to another statement that indicates they have been used together at some time as part of a solution. A statement can have many relationships based on the number of solutions of which it is a part.

### Score

Oracle Knowledge Management evaluates the criteria to produce a score to present the best solution first. The scoring criteria include the number of times that a solution has: been linked to an external object and solved; been linked to external objects; received positive feedback; been viewed as a solution; or received negative feedback. These scores are shown as a combined score to indicate the strength of the match to the query entered. The maximum score is 100.

**Solution**

Collection of information or statements to solve an issue or answer a question.

**Solution Number**

Every solution in Oracle Knowledge Management is associated with a unique number. This search finds the solution that is associated with the number entered in the search query field.

**Solution Score**

Each solution is scored based on the text match performed by Oracle Text and the number of times it has been successfully used to solve issues. These scores are shown as a combined score to indicate the strength of the match to the query entered. The maximum score is 100.

**Solution Type**

An attribute of a solution that helps define the type of content that goes into a solution (a solution type is like a template).

**Statement**

A statement is a description of any aspect of a problem, its cause, or its resolution. It contains a summary field that can be a maximum of 500 characters and a detail field that can be maximum of 4 GB. Statements can be segmented into statement types.

**Statement Type**

Statements can be segmented into statement types. It is an identifying name associated with a particular part of a solution type. For example, question is a statement type in a question or answer solution type.

**Status**

Solutions and statements have a status attribute. This attribute describes the phase of review that a solution or statement has gone through. Common solution statuses are: Draft, Under Edit, Technical Review, Editorial Review, Obsolete, and Published.

**Symptom**

An Oracle Knowledge Management statement type that contains the issue the user is trying to solve. It is a part of the Symptom-Cause-Action solution type.

**Unified Search**

Also known as a Simple Search. See **Simple Search**.

**User**

An Oracle Knowledge Management user can be an internal or an external user. External users are users that can see published solutions. Internal users include system administrators, knowledge workers, and knowledge agents.

# Index