Oracle® Knowledge Management

User's Guide

Release 11*i*

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Oracle Knowledge Management User's Guide, Release 11*i*

Part No. B13728-02

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Contents

A   Frequently Asked Questions

B   Display Search Option List

Glossary

Index

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Oracle Knowledge Management User's Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Knowledge Management User's Guide*.

Welcome to the Oracle Knowledge Management User's Guide.

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 available through Oracle University.

- The Oracle Applications graphical user interface. To learn more about the Oracle Applications graphical user interface, see the Oracle Applications User's Guide.

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

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

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This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

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.

Oracle*MetaLink*. 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 Oracle*MetaLink* 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

Welcome

This part contains the following chapters:

- Introduction, page 1-1
- Overview, page 2-1

1

Introduction

This chapter covers the following topics:

- Summary
- Key Features
- Integration

Summary

Oracle Knowledge Management is an information management system that uses knowledge capture, storage, and distribution tools that Oracle 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. Solution Security lets you manage who can view which information to help you manage the relative confidentiality and visibility of information.

Oracle Knowledge Management currently provides solution management functionality to other Oracle Applications modules, such as Oracle iSupport, Oracle TeleService, Oracle Field Service, Oracle Depot Repair, and Oracle eMail Center. The Oracle Knowledge Management architecture supports diverse usage and integration with other Oracle modules.

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- 3
- 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.

Simple Search lets you 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.

Solution Scoring

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. The maximum score is 100. Solution scores vary depending on the search method.

Solution usage recording for Oracle iSupport tracks your customers' access to solutions. Solution usage recording can assist customer service agents identify relevant solutions when they assist their customers.

Integration

Oracle Knowledge Management integrates with the following Oracle Applications modules:

- Oracle iSupport, page 1- 4
- Oracle TeleService, page 1- 4
- Oracle Depot Repair, page 1- 4
- Oracle eMail Center, page 1- 4
- Oracle Partners Online, page 1- 5

For information about searching with integrated products, see:

About Searching with Integrated Modules--Agent Flows, page 3-29

About Searching with Integrated Products--Customer Flows, page 10-10

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. Oracle iSupport enhances customer satisfaction while cutting the costs of customer support and improving the productivity of service organizations. For more information, see the *Oracle iSupport User Guide*.

Oracle iSupport uses Oracle Knowledge Management to search for published solutions. Oracle iSupport users and service agents can search Oracle Knowledge Management for solutions. Oracle iSupport users can also see frequently used solutions and solutions recommended by an Oracle Knowledge Management administrator, without waiting for a service agent's assistance.

Oracle TeleService

Oracle TeleService (Support module) is a Service Request Management System that integrates with Oracle Knowledge Management for resolving customer issues. It is an agent-facing module that a customer service representative or agent (CSR) uses. Oracle TeleService provides an integrated solution for conducting all aspects of customer management and interaction. It provides call center agents with the tools and information required for effective customer relationship management. For more information, see the *Oracle TeleService User Guide*.

The integration of Oracle TeleService's Service Request module with Oracle Knowledge Management reflects the following process flow:

- A CSR receives a customer call. The agent opens a service request by entering customer information and verifying service eligibility.

- The CSR notes the customer problem. While writing the problem description, the CSR searches the knowledge base for similar information. If the same or similar problem exists, a solution may be available as well. Agents can access more solutions than customers.

- The CSR searches in the knowledge base for an existing solution. If a suitable solution is found, the CSR can use it. If not, the CSR can create a new solution.

Oracle Depot Repair

Oracle Depot Repair tracks and manages the repair process in a service organization. This module reduces customer downtime and helps bridge the gap while the product is being repaired. For more information, see the *Oracle Depot Repair User Guide*.

Oracle eMail Center

Oracle eMail Center manages inbound e-mail interactions with customers, partners, suppliers, employees, and others who interact with an organization. Oracle eMail Center provides agents with tools and capabilities to maximize their productivity and effectiveness. For more information, see the *Oracle eMail Center User Guide*.

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

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 and sales and service support for the partners.

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

2

Overview

This chapter covers the following topics:

- About Accessing Oracle Knowledge Management
- Summary of Tasks

About Accessing Oracle Knowledge Management

Oracle Knowledge Management has both internal users and external users that can search for published solutions. Users of several Oracle Applications modules access Oracle Knowledge Management for searching and creating solutions. For example, Oracle iSupport users can access Oracle Knowledge Management from the Support tab on the Oracle iSupport Home page to search for published solutions.

Knowledge workers, customer service representatives, and Oracle Knowledge Management administrators can access Oracle Knowledge Management directly to search for solutions and to create new solutions. Internal users have various levels of setup and other administrative permission.

Solution Security impacts all users of Oracle Knowledge Management. By associating Visibility Levels to categories, solutions, statements, category views, and user accounts, Solution Security lets you manage who can see which information. By specifying Visibility Levels, you can use Solution Security to manage the relative confidentiality or sensitivity of information.

Roles, Responsibilities, Permission, and Access

Responsibilities determine:

Roles determine window-level permission. A user can have one or more Roles.

- The menus that a user views.
- The Category Security Group (category view) to which a user belongs. This establishes which categories users can access.

Every user must have at least one Responsibility, but a user can have one or more Responsibilities.

Users may be either:

- **External**: Those who have only view and search access to published solutions. Typically, external users may access Oracle Knowledge Management from other modules, such as iSupport.

- **Internal**: Include customer service representatives or agents, knowledge workers, and Oracle Knowledge Management administrators.

The following table lists responsibilities, menus, and tabs associated with internal Oracle Knowledge Management users.

Responsibilities, Menus, and Tabs for Internal Oracle Knowledge Management Users

Responsibilities	Menus	Tabs
Knowledge Worker	CS_KB_TOP_KW_MENU	Knowledge, Authoring
Knowledge Agent	CS_KB_TOP_AG_MENU	Knowledge, Authoring
Knowledge Administrator	CS_KB_TOP_MENU	Knowledge, Authoring, Setup

Access for External Users

External users access Oracle Knowledge Management through other Oracle Applications modules. For example, users of Oracle iSupport click the Support tab on Oracle iSupport Home page. Both Oracle Depot Repair users and Oracle TeleService users can access Oracle Knowledge Management through the respective module's diagnostics feature. For more information, see the corresponding Oracle product documentation.

Access for Internal Users

The following procedure describes access for internal users of Oracle Knowledge Management.

Login

Oracle Applications

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab (default)

The Knowledge tab displays the Simple Search and the Knowledge: Browse by Subject areas. From the Knowledge tab you can search for or browse solutions.

For more information, see Managing Search., page 3- 1

Summary of Tasks

Use Oracle Knowledge Management to perform the following types of tasks:

- Manage Searches

- Manage Solutions
- Manage Solution Types
- Manage Statement Types
- Manage Categories
- Manage Authoring Flows
- Manage Security

Part 2

Agent Flows and Administration

This part contains the following chapters:

3

Managing Search

This chapter covers the following topics:

- About Managing Search
- Using Simple Search--Agent
- About Solution Details
- Using Advanced Solution Search--Agent
- Working with Statements
- Set Up Definitions for Frequently Used Solutions
- About Index Synchronization
- About Searching with Integrated Modules--Agent Flows

About Managing Search

This chapter includes information about the search functionality in Oracle Knowledge Management. The intended audiences for this chapter are agents and administrators. However, the user who accesses Oracle Knowledge Management from **other modules**, such as iSupport, can find the Overview section to be useful for background information on searching and browsing.

Those who access Oracle Knowledge Management from **other modules**, should see Managing Search--Customer Flow, page 10- 1 for procedural information.

You search in Oracle Knowledge Management to find solutions in the knowledge base. In Oracle Knowledge Management, you can:

- Extend searches to include multiple repositories.
- Allow users to search using different searching methods.
- Control user access to solutions according to Security settings.

Search Modes

Oracle Knowledge Management has the following search modes:

- **Simple Search**: Perform text searches across multiple repositories. Examples of repositories include Solutions, Forums, and Categories. Simple Search uses the Oracle Text search engine to execute key word searches.

  > **Note:** Earlier versions of Oracle Knowledge Management referred to Simple Searches as either Basic Searches or Unified Searches.

- **Advanced Solution Search:** Perform solution searches by using statements to search and manipulate criteria. Advanced Solution Searches search exclusively in the Solutions repository.

Indexing and Availability of Solutions

Both the Simple Search and Advanced Solution Search retrieves only published solutions that have been indexed. That is, neither the Simple Search nor the Advanced Solution Search can retrieve solutions that are in progress, in draft mode, or obsoleted.

Security and Visibility

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security, page 9- 1 .

Integrated Modules

Other Oracle service-related modules access and search using Oracle Knowledge Management. For example, service representatives might try resolving customer issues by searching Oracle Knowledge Management from the Oracle TeleService module, while customers might search for solutions through Oracle iSupport. Depot Repair users can search using Oracle Knowledge Management to diagnose repair jobs.

Knowledge and Solutions

Solutions are not only content. Solutions are pieces of knowledge or knowledge articles that actually provide information on how to resolve a particular issue.

The main components of a solution include: statements, related categories, related items, related platforms, attachments, Task Group Templates, external objects, authoring comments, and feedback.

> **Note:** Earlier versions of Oracle Knowledge Management referred to Items as Products.

For more information about solutions, see Managing Solutions, page 4- 1 .

Other overview topics that pertain to agent-flow searching include:

- Solution Overview, page 3- 2
- Searching Functionality Overview, page 3- 3
- About Sorting Search Results, page 3- 6

Solution Overview

To understand the searching process in Oracle Knowledge Management, it is important to understand how you add solutions the knowledge base.

The following example describes how to add a solution to the knowledge base.

Example: Solutions in the Knowledge Base

Company ABC manufactures and sells dishwashers. When customers have issues with their dishwashers they call the Company ABC service department for assistance. In certain cases, the customer must ship the dishwashers to Company ABC for repair or schedule a field service representative to come and fix it. After the problem with the

dishwasher is resolved, the service department creates a solution in the knowledge base. The knowledge worker in the company ensures that the solution has been properly authored and publishes the solution. After publishing the solution in the knowledge base, the company can share the solution with other customers and service representatives. Customers can access the solution by conducting a search of the Company ABC knowledge base from another module, such as Oracle iSupport. The knowledge base can also be shared with Company ABC suppliers or partners who need to access it.

Searching Functionality Overview

Oracle Knowledge Management integrates with Oracle Text to provide complete and flexible search functionality. You can use Oracle Knowledge Management to browse or search for solutions and statements using the following ways:

- Simple Search, page 3- 3

- Categories, page 3- 3

- Advanced Solution Search, page 3- 4

- Statement Search, page 3- 6

- Solutions in Progress, page 3- 6

Simple Search

In its simplest form, a search can be a key word search. The 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 available for search.

The Simple Search performs a key word search of the solution header, body, and number. For categories, the Simple Search performs a key word search on the category name. For forums, the Simple Search performs a key word search across the message subject, message body, and message number. For service requests, Simple Search performs a keyword search on the summary and Notes.

The following example describes a scenario for a Simple Search.

Example: Simple Search

A customer of Bicycle Company ABC has logged on to Oracle iSupport to find out how to remove a tire from a bike. The customer enters the key words, *remove tire*, into the text entry box to search the knowledge base. After selecting search, a list of results appear in a summary table. The sorting within the summary table shows the documents of highest relevancy (score) to the search criteria at the top. Each row in the table displays a solution. The customer identifies a potential solution from the search results table called, *Removing a Tire*. The customer can view the solution details by clicking the solution title. The customer can also view the search results across multiple repositories, such as by solution, forum discussion, or an existing service request.

Categories

Categories are a way to organize the knowledge base. Categories let you navigate or browse through a hierarchy of categories, subcategories, and solutions within the knowledge base.

The following example provides an example of how to use categories to browse.

Example: Browsing Categories

Bank ABC has set up Oracle Knowledge Management categories to allow tele-service representatives to navigate solutions, thereby replacing the need for its large employee procedure manual, which answers basic customer questions about the bank and its products. Categories for Bank ABC include Customer Address Procedures, Branch Locations, Business Hours, Checking Accounts, and Savings Accounts.

A customer calls the Bank ABC tele-service center and asks how late the San Jose branch is open. The Bank ABC tele-service representative navigates to the **Branch Locations and Hours** category. A list of subcategories appears. The tele-service representative then navigates into a subcategory called **Northern California Branches**. Within the **Northern California Branches** subcategory a list of results appear in a summary table. Each row in the table shows a solution. The tele-service representative identifies a potential solution from the search results table called **San Jose Branch Details**. The representative can view the solution details by clicking the solution title. Using the information contained in the solution details, the representative can answer the customer's question.

Advanced Solution Search

Advanced Solution Search lets you search for solutions that meet specific user defined criteria. This is a more comprehensive search that enables you to set conditions, filters, and incorporate similar and identical statements into your search. Solutions are made 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.

The following figure shows how Oracle Knowledge Management's Advanced Solution Search identifies related statements and solutions in the knowledge base.
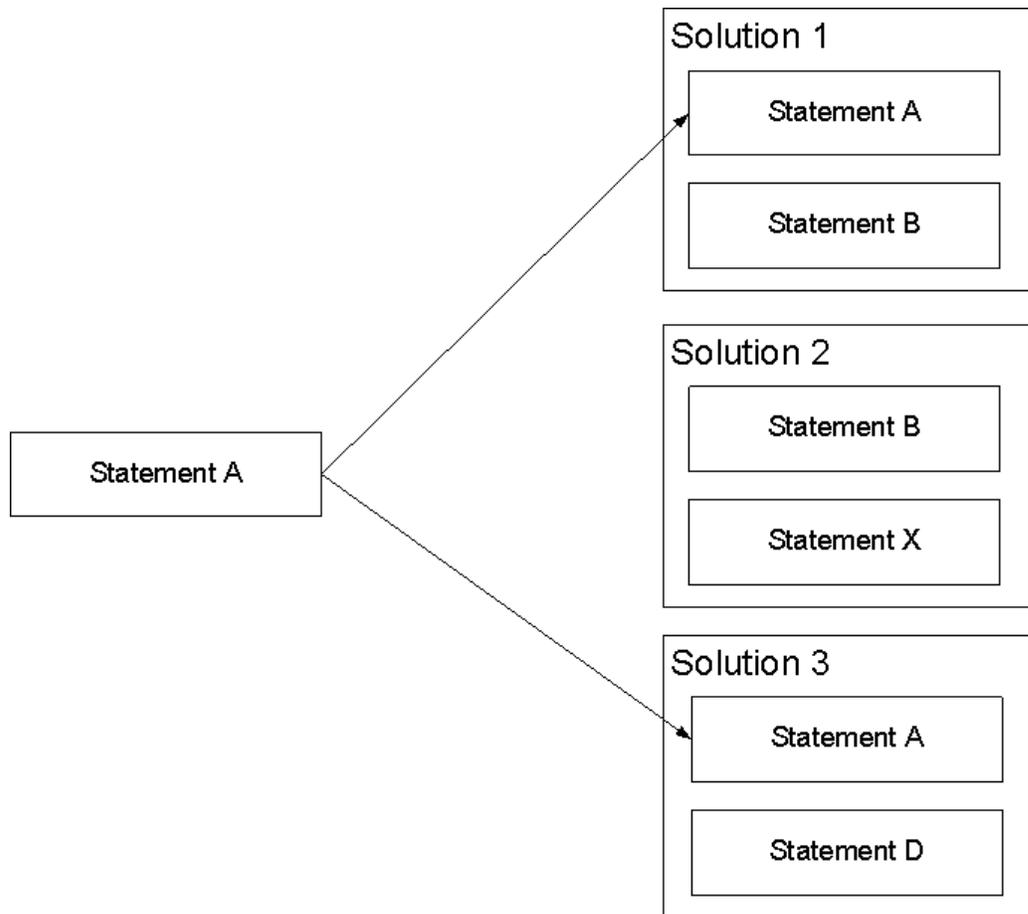
Summary of Related Statements and Solutions Figure: Statements B and D are related to Statement A because they are part of solutions that also contain Statement A. If you select statement A and search for related statements, both statements B and D appear in the results. Statement X is not related to Statement A because it is not part of a solution that contains Statement A. Solutions 1 and 3 are related to Statement A because they each contain Statement A. If you select statement A and search for related solutions, solutions 1 and 3 appear in the results. Solution 2 is not related to Statement A because it does not contain Statement A.

The following example provides an example of how to search with Advanced Solution Search.

Example: Advanced Solution Search

Electronics Manufacturer ABC has discovered one of the components it manufactures, the ABC Hard Drive, is defective. Currently several solutions in the knowledge base relate to the ABC Hard Drive. To ensure that the knowledge base contains accurate and up-to-date information, knowledge workers can search for statements of type **symptom** that describes the problem. From the matching statements, the knowledge worker can view solutions that relate to the issue better.

In addition, knowledge workers search for solutions that relate to these statements. The knowledge worker identifies all solutions from the search results table that relate to the ABC Hard Drive and updates the solutions and statements accordingly.

Statement Search

You use statement search more for statement maintenance rather than a way of finding solutions. Statement Search lets you search for specific statements and find their related solutions.

Solutions in Progress

Solutions in Progress (formerly known as Work Pending in prior versions of Oracle Knowledge Management) is a search that is specifically designed to search drafts or solutions that are not yet published. This search provides an way for knowledge workers or approvers to process solutions.

About Sorting Search Results

Search results within Oracle Knowledge Management appear in a summary table that you can sort by column. To sort data into ascending or descending order, click a column heading. When you sort by column, an arrow appears in the column heading. An Up arrow indicates an ascending sort and a Down arrow indicates a descending sort.

Access to Solutions and Statements

When you create a solution or statement, you assign a Visibility Level attribute. This attribute along with user access levels makes it possible to control which solutions and statements a particular user can access during a search. This allows companies to add information to the knowledge base that can be critical in helping employees do their jobs, but it might not be appropriate for customers to see.

Visibility Levels include:

- **Restricted** (highest security): A solution that only users with restricted permission can view. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **Internal**: A solution that users with internal or restricted permission can view. This Visibility Level identifies solutions that internal users within a company can view.

- **Limited**: This Visibility Level has the same effect as internal distribution. The Limited Visibility Level is a way for companies to identify solutions that can be distributed manually to external customers through a mechanism, such as e-mail. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **External** (lowest security): A solution that users with external, internal, or restricted permission can view. This Visibility Level identifies solutions that internal users within a company and external customers can view.

Although there are four Visibility Levels in effect, there are only three. Both the Internal and Limited Visibility Levels are the same. This is a way for companies to distinguish the solutions that are intended for different internal audiences.

For more information about Security and Visibility, see Managing Security, page 9- 1 .

Most solutions and statements in the knowledge base are typically for external distribution.

The following example describes how a company might use Visibility Levels.

Example: Visibility Levels

Company ABC has created a business process that directs customer service representatives to notify the sales department by e-mail when customers call regarding a particular software solution in the knowledge base. The purpose of this notification is to provide Company ABC sales representatives with leads for their training organization.

Company ABC wants to add a statement to the solution reminding customer service representatives to follow this process but wants this interaction to be invisible to the customer. Company ABC also wants its customers to know the telephone number for its training organization at the time they access the solution.

- A knowledge worker at Company ABC creates a statement with an internal distribution that states, **Forward customer name and solution number to sales@companyabc.com**.

- A knowledge worker at Company ABC creates a statement with an external distribution that states, **Training is available by calling Company ABC University at 800.555.4321**.

Customers who are accessing the knowledge base from a calling modules--such as iSupport--see the telephone number statement as it is flagged for external distribution, but do not see the request to notify the Company ABC Sales department as it is flagged for internal distribution.

Using Simple Search--Agent

This section applies to the agent-facing flows that are available directly within Oracle Knowledge Management. Agents may comprise knowledge workers, technical support agents, or other employees. If you are accessing Oracle Knowledge Management from other modules, such as Oracle iSupport, refer to Managing Search--Customer Flow, page 10- 1 for procedural information.

Simple Search lets you enter key words to perform a search for solutions across multiple repositories within the knowledge base. By default, Solutions, Solution Categories, Service Requests, and Forum are the repositories available for search. Because of its key word based interface, simple search is accessible to users of all levels of experience. The Simple Search matches the words that you enter across the header and body of the solution.

> **Note:** Previous versions of Oracle Knowledge Management referred to the Simple Search as either the **Basic Search** or the **Unified Search**. Also, previous versions of Oracle Knowledge Management referred to items as **products**.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security, page 9- 1 .

The following diagram illustrates the process flow for a basic solution search by showing the steps from entering the search criteria to providing feedback on a solution.

Simple Solution Search Process Diagram
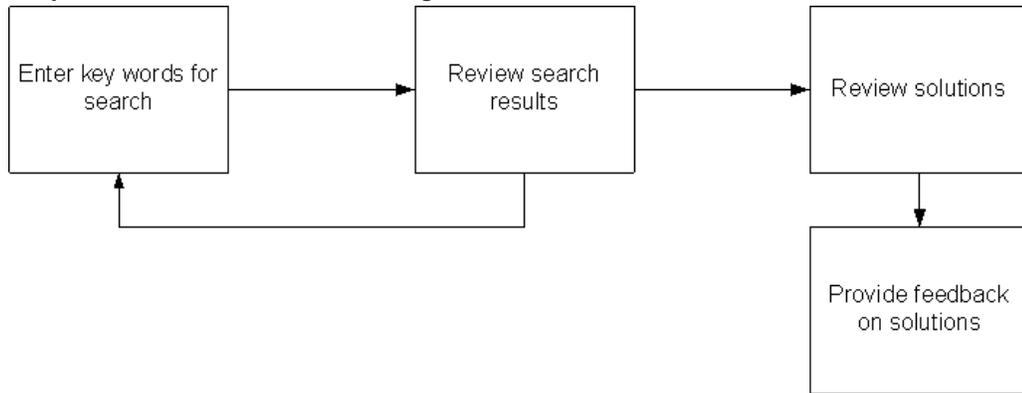
Use this procedure to perform a Simple Search.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent Knowledge

Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Knowledge...Simple Search area

Steps

1. In the Search field, enter any key word criteria.

2. In the Using field, choose one:

    • **Any of the words**: To match one or more words in any sequence.

    • **All of the words**: To match all words in any sequence.

    • **Exact Phrase**: To precisely match word-by-word in the same sequence.

3. Optional: In the Item field, specify the product name or description by choosing from the Search and Select List of Values.

    Note: The administrator can configure the item fields to be any one of: a list of values with product descriptions, a list of values with product names, a list with product descriptions, or a list with product names.

    To access the Search and Select List of Values:

    1. Click the Flashlight icon. The Search and Select List of Values window opens.

    2. In the Search field, choose to search either by Product Name or Description.

    3. In the empty field to the right, enter search criteria, and click Go. The search results appear on a list.

4. Select an item on the list and click the Select button, or click the Quick Select icon. The description of the selected item appears as search criteria in the Simple Search area. The underlying product itself, not the product description text, is what is added to the search criteria. The description text that appears in the box is there to remind you of the product that you chose. The description text is not actually used in the search.

Note: Your administrator can personalize the search region so that the product name appears instead of the product description.

4. Click Go.

The Simple Search Result page displays the results on any of these tabs: Solutions, Categories, Service Requests, and Forum. Each tab represents a repository. The number of search matches appear on each tab name.

For more information, see About Simple Search Results, page 3- 9 .

Related Topics

About Simple Search Results, page 3- 9

About Categories, page 3-11

Browse Categories, page 3-12

About Forum Messages, page 3-12

About Simple Search Results

The Simple Search results appear in tabs. Each tab corresponds to a repository. The repositories are:

- Solutions, page 3- 9
- Solution Categories, page 3-10
- Service Requests, page 3-10
- Forum, page 3-10

Common actions that you can perform from the repository tabs include:

- Sorting the display of search results by clicking the Score, Name, Solution Number, or Updated Date column headings.
- Modifying your Simple Search criteria. For more information, see Using Simple Search, page 3- 7 .
- Moving your Simple Search criteria to Advanced Solution Search by clicking the Advanced Solution Search link. For more information, see Move Simple Search Criteria to Advanced Solution Search, page 3-17.

Solutions

Search results on the Solutions tab include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

  For more information, see Solution Scoring, page 1- 3 .

- **Title**: Indicates the solution title. You can click the title to drill down to the solution details.

- **Solution Number**: Displays the matching solution number, which is a unique reference for the solution.

- **Updated Date**: Shows the most recent date on which an update occurred.

On the Solutions tab, you can:

- Click a solution title to display the solution detail page. For more information, see About the Solution Detail Page, page 3-13.

- Click the Create Solution button to create a new solution. For more information, see Create a Solution, page 4- 4 .

Solution Categories

Search results on the Solution Categories tab include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Name**: Shows the category name and hierarchy.

On the Solution Categories tab, you can:

- Click the category name to display solutions listed. For more information, see About Categories, page 3-11.

Service Requests

Search results on the Service Requests tab include:

- **Score %**

- **Summary**

- **Number**

- **Status**

- **Problem Type**

- **Resolution Type**

For more information about Service Requests and its fields, see the *Oracle iSupport User Guide* and the *Oracle TeleService User Guide*.

Forum

Search results for the Forum repository appear in a summary table and include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

  For more information, see Solution Scoring, page 1- 3 .

- **Title**: Indicates the forum title. Click a title to see its contents.

- **Updated Date:** Shows the most recent date on which the forum was updated

On the Forum tab, you can:

- Click the corresponding Forum to display the Message Content page. For more information, see About Forum Messages, page 3-12.

- Sort the display of search results by clicking the Score, Title, or Updated Date column headings.

- Modify your Simple Search criteria. For more information, see Using Simple Search--Agent, page 3- 7 .

- Move your search criteria to Advanced Solution Search by clicking the Advanced Solution Search link. For more information, see Move Simple Search Criteria to Advanced Solution Search, page 3-17.

Related Topics

About Categories, page 3-11

Browse Categories, page 3-12

About Forum Messages, page 3-12

About Categories

You use Categories to organize solutions into logical groupings or subject areas. Using the analogy of a library, you could:

- Characterize fiction as a category

- Characterize mysteries and classics as subcategories

- Compare books to solutions

- Compare book titles to solution titles.

Oracle Knowledge Management lets you navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base to find published solutions. When viewing solution details, the user can see the categories to which the solution belongs.

The following diagram illustrates the process flow for browsing solutions by showing the steps from reviewing categories to providing feedback on the solution.

Browse Categories Process Diagram

About Category Browsing from Search Results

You can browse categories directly from the search results. By clicking a category's name in the search results, you navigate to the same category browse view as the one reached by drilling down from category to category.

For more information on performing a Simple Search, see Using Simple Search--Agent, page 3- 7 .

Related Topics

About Simple Search Results, page 3- 9

Browse Categories, page 3-12

About Forum Messages, page 3-12

Browse Categories

Use this procedure to browse categories to find solution.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Search

Steps

1. In the Browse by Subject area, click a Category.

   The Browse By Subject page appears.

2. Click a Category (a subcategory) or a Solution.

   The Solutions section follows the Browse By Subject section.

3. To filter solutions by some time frame or period, choose a value from the **View solutions updated** list and click Go.

   Examples of time frames or periods can include: this week, this month, the past 3 months, the past 6 months, this year, the past two years, and all.

You can also perform a Simple Search to narrow your category browsing solution results. You can specify key word and product criteria using the search method that you want to use.

For more information, see Using Simple Search--Agent, page 3- 7 .

Solution Results within a Category

The Solution results that appear within a Category appear in a summary table and include:

- **Title**: Indicates the solution summary. Users can click the title to drill down to the solution details.

- **Number**: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.

- **Updated Date**: Shows the most recent date on which the solution was updated.

- **Read**: Lets you know whether or not you' have already read that forum message.

To display the solution detail page, click the corresponding title.

About Forum Messages

You can use the Simple Search to search across multiple repositories, including Forums. Forums are online discussion messages that can provide some assistance to

problems, symptoms, and solutions. The Simple Search performs keyword searches across the message subject, message body, and message number. You view the list of matching forum messages from the Forums tab on the Simple Search page. Click the Title of a message to display the Forum Message page. The Forum Message page displays:

- **Header information**: Number, Status, Author, Visibility, and Created.

- **Message**: The message details.

- **Related Messages**: Other messages in the message thread, including the original and replies. For more information, see the following topic, About Related Messages, page 3-13.

About Related Messages

The Related Messages area of the Forum Messages page displays a hierarchy that you can expand or collapse by clicking a Plus or Minus icon. At the top of the hierarchy is the original message. Subordinate to the original message are replies and replies to replies.

The Related Message section displays the **Message** title, **Author**, **Created** date, and **View** icon.

Optionally, you can click either link:

- **Expand all**: Display the list of the original forum message and all of the replies.

- **Collapse all**: Hide all the replies to the original forum message.

To see the specific related message or reply, click the View icon.

Related Topics

Using Simple Search, page 3- 7

About Simple Search Results, page 3- 9

About Categories, page 3-11

Browse Categories, page 3-12

About Solution Details

This section applies to the agent-facing flows that are available directly within Oracle Knowledge Management. Agents may comprise knowledge workers, technical support agents, or other employees. If you are accessing Oracle Knowledge Management from other modules, such as Oracle iSupport, refer to Managing Search--Customer Flow, page 10- 1 for procedural information.

Whenever you view a knowledge solution from within Oracle Knowledge Management or from another module, such as TeleService or Depot Repair, the presentation and format of the information appears on the solution detail page.

The Solution Detail page:

- Identifies important information about the solution including what the solution is about (statements), and the type of solution.

- Shows how the solution is applicable to specific products, categories, and platforms. If no data exist for an area, then corresponding product, category, or platform area does not appear.

- Shows details, such as the attachments, Task Group Templates, and external objects (that is, Service Requests, Repair Orders, and so forth). If no data exist for an area, then corresponding attachments, Task Group Templates, or external objects area does not appear.

The system may have activated Task Group Templates with a solution. Solution detail can include these tasks, which are a description of how to take action on a solution. An example of a task is **schedule a field service representative**.

Elements that comprise a solution include:

- **Header**

- **Related Categories**

- **Related Items**

- **Related Platforms**

- **Statements**

> **Note:** The statement is the most critical information in the solution.

- **Attachments**

- **Task Group Templates**

- **Authoring Comments**

- **Feedback**

For more information about these elements, see Create a Solution, page 4- 4 .

About the Solution Detail Page Header

Information identifying the solution and its history appear in the header. The header includes:

- **Type**: Indicates the solution type.

- **Status**: Indicates where the solution is in the approval cycle.

- **Author**: Indicates user who created solution.

- **Visibility**: Indicates who can access the solution.

- **Last Updated**: Indicates when the solution was last updated.

- **Updated By**: Indicates who updated the solution most recently.

- **Flow name**: Only for solution in progress version, shows the authoring flow name.

- **Locked by**: Only for solution in progress version, shows the name of the person who locked the solution.

Related Topics

About Accessing Solution Details, page 3-15

Features on the Solution Details Page, page 3-15

View Related Solutions, page 3-16

About Accessing Solution Details

You can access the solution detail page from a number of ways, such as by searching or browsing. For more information, see:

- Using Simple Search--Agent, page 3- 7

- About Categories, page 3-11

- Using Advanced Solution Search--Agent, page 3-16

- Working with Solutions in Progress, page 4-18

Features on the Solution Details Page

You can submit comments that can be reviewed and added to the solution. In addition, you can indicate whether a solution can solve your problem. Oracle Knowledge Management captures responses in Usage counts.

The options that are available on the solution detail page vary according to the context in which you accessed the solution's details. For example, if you are viewing a solution that is undergoing revisions, then the View Current Published Version is available.

From the solution detail page, you can:

- **View In Progress Version** or **View Current Published Version**: Read and compare any version of this solution that is undergoing editing with the most recently published version. The View In Progress Version button and the View Current Published Version button appear only if the corresponding version exist.

- View a **Printable Page**: Produces a page that is more suitable for printing.

- **Lock and Update**: If you have access to all statements in a solution, this option lets you lock and update and update the solution. Locking prevents others from updating the solution. (Previously, this button was the **Check Out** button.

- **Related Solutions**: The Related Solutions page displays all solutions that contain the specified statement. For more information, see View Related Solutions, page 3-16.

- View a list of **Related Items**: Automatically displays other related or similar product names. If there are no related items, then this list does not appear.

- View a list of **Related Platforms**: Displays a list of related or similar platforms. If there are no related platforms, then this list does not appear.

- **Update**: This is available to person who has created or locked the solution. Knowledge workers are the ones who would usually perform updates.

- **Get Lock**: This is mainly for the administrator to get the lock of the solution if the solution has been locked by someone, but that person is not available to update and save their updates. Examples of a person who might not be available include an employee who is away on holiday or a business trip, or who no longer works for the company.

About Solution Usage Counts

The solution usage count describes how many times that users have indicated that a solution is **useful**. In Oracle Knowledge Management, every time users indicate that they used a solution to solve a problem, Oracle Knowledge Management updates the solution usage count. In the modules that integrate with Oracle Knowledge Management--such as Oracle iSupport--the question, **Can this solution solve your problem?**, appears in the user interface flow. If a user clicks **Yes**, then the Knowledge

Management Update Solution Used Count concurrent program updates the used counts in Oracle Knowledge Management based on a time schedule that an administrator had set up. For example, if the schedule is every eight hours, then the system updates the usage count every eight hours.

Related Topics

About Accessing Solution Details, page 3-15

View Related Solutions, page 3-16

View Related Solutions

The Related Solutions page displays all solutions that contain the specified statement. For example, when you are viewing a statement on the solution detail page, you can click the Related Solutions button to find all solutions that make use of that statement. The list of related solutions displays:

- **Title**: The solution title.

- **Title**: The solution title.

- **Number**: The solution number.

- **Type**: The solution type, such as FAQ, Problem Fix, SCA.

- **Status**: The solution status, such as Publish.

- **View icon**: Click the icon to view the related solution. For more information, see Features on the Solution Details Page, page 3-15.

> **Note:** To return to the solution, click the **Return to Solution** link.

Related Topics

About Accessing Solution Details, page 3-15

Features on the Solution Details Page, page 3-15

View Related Solutions, page 3-16

Using Advanced Solution Search--Agent

This section applies to the agent-facing flows that are available directly within Oracle Knowledge Management. Agents can comprise knowledge workers, technical support agents, or other employees. If you are accessing Oracle Knowledge Management from other modules, such as Oracle iSupport, see to Managing Search--Customer Flow, page 10-1 for procedural information.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security, page 9-1 .

Topics in this section include:

- About Advanced Solution Search, page 3-17

- Search for Solutions Using Advanced Solution Search, page 3-18

- About the Matching Statements Page, page 3-21

- About the Related Statements Page, page 3-21

- About Advanced Solution Search Results, page 3-22

About Advanced Solution Search

Advanced Solution Search searches only solutions in the knowledge base and lets you find solutions using statements and qualifying conditions as criteria. In addition, you can specify attributes of the solution such as products and categories and which statement types to retain in the search. Being able to specify statements as criteria means that you can use existing statements to find a solution.

The following summary provides an overview of the search criteria that you can specify in an Advanced Solution Search.

Problem Statements

Statements are the basis of the Advanced Solution Search. Statements include:

- **Matching Statements**: This is a text-based search that searches the summary and details of existing statements in the database to try and find similar statements.

- **Related Statements**: A related statement search tries to find other statements that have been used in a solution containing a selected statement. You can execute a Related Statement search only if you have selected at least one matching statement. For an example of how statements relate, see Advanced Solution Search, page 3- 4 .

Types of Searches

Search options include:

- **Search Solutions**: This is a text based search. Search Solutions searches both solutions containing keywords in the statement section, and the solutions related to any statements selected in the statement section. In other words, Search Solutions finds all solutions that match the search criteria.

- **Search Related Solutions**: Search Related Solutions finds all solutions that contain the specified solutions.

    > **Note:** By default, the Search Related Solutions option is not available. You can make this option available through personalization.

    This search is based on the links that the selected statements have to solutions. Any solution that has a relationship with any of the selected statements appears in the search results. Relationships are created between a statement and a solution when a statement is used in the solution. The score reflects a variety of criteria that Oracle Knowledge Management uses.

    For more information, see Solution Scoring, page 1- 3 .

Move Simple Search Criteria to Advanced Solution Search

Another means by which you can specify some advanced solution search criteria is to move Simple Search criteria over the Advanced Solution Search page. You can move Simple Search Criteria to the Advanced Solution Search page by clicking the Advanced Solution Search link that appears on the following Simple Search results tabs:

- Solutions, page 3- 9

Related Topics

Search for Solutions Using Advanced Solution Search

The following procedures describe how to specify criteria for an Advanced Solution Search.

For more information on using Advanced Solution Search, see About Advanced Solution Search, page 3-17.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Knowledge

Steps

1. Click Advanced Solution Search.

    The Advanced Solution Search page appears.

    Find Statements to Use as Criteria

2. In the Problem Statements area, choose from the following lists:

    - **Using**: **All of the words**, **Any of the words**, or **Exact Phrase**.

    - **Solution Type**: such as, **Symptom-Cause-Action**, **Problem-Fix**, or any solution types that your company has defined.

      Note: By default, both the **Using** and **Solution Type** lists are not available unless the administrator has configured them to be available.

3. In the Summary field, enter search criteria text for statements.

4. Click the Match Statement icon.

5. The Matching Statements page opens.

6. In the Select column, select one option button next to the matching statement that you want to use for advanced solution search criteria.

   Note: You can also refine your statement search on this page by choosing a new statement type, entering a modified summary, and clicking Go.

7. Click either the:

   • **Add** button to add the statement to the search criteria.

   • **Replace** button to replace any existing statement criteria with the selected statement.

     On the Advanced Solution Search page, the Matching Statements area displays the matching statements that you selected.

     For more information, see About the Matching Statements Page, page 3-21.

8. Optional: To add another row for specifying matching statement criteria, click the Add Another Row button and repeat the preceding steps on the new row.

   Add Related Statements

   After you add statement criteria to the Advanced Solution Search criteria, the Add Related Statements button becomes available. For more information, see About the Related Statements Page, page 3-21.

9. To add related statements, click the Add Related Statements button.

   The Related Statements page appears.

10. To add a related statement to your Advanced Solution Search criteria:

    1. On the row of the statement, select the Select check box.

       You can select or deselect one or more statements.

    2. Click the Add button.

       The selected related statements appear on the Advanced Solution Search page as search criteria.

       Specify Qualifying Conditions

       Optional: By specifying qualifying condition criteria, you can refine and narrow your search by categories, items (products), or platforms. Qualifying conditions are also known as filters.

       Note: The Platform filter might or might not be available. Your administrator can hide or display the Platform filter through personalization.

11. To specify **categories** as qualifying conditions:

    1. Click the Add Categories button.

       The Add Categories page displays categories and subcategories in a navigation tree.

    2. To expand or collapse the category list, click the Plus or Minus button.

    3. In the Select column, select one or more items that you want to include and click the Select button.

       The selected categories appear in the Qualifying Conditions: Categories area of the Advanced Solution Search page.

12. To specify **items** (products) as qualifying conditions:

   1. Click the Add Items button.

      The Add Items page appears.

   2. In the Search area, specify Name or Description criteria and click Go.

      You can use the percent sign for specifying partial match criteria. Matching results appear on the list organized by Name and Description.

   3. In the Select column, select one or more the check boxes on the row(s) of items that you want to include, and click the Select button.

      The selected items appear in the Qualifying Conditions: Items area of the Advanced Solution Search page.

      Note: Previous versions of Oracle Knowledge Management referred to **items** as **products**.

13. If available, to specify **platforms** as qualifying conditions:

   1. Click the Add Platforms button.

      The Add Platforms page appears.

   2. In the Search area, specify Name or Description criteria and click Go.

      You can use the percent sign for specifying partial match criteria. Matching results appear on the list organized by Name and Description.

   3. In the Select column, select one or more platforms that you want to include, and click the Select button.

      The selected solution platforms appear in the Qualifying Conditions: Platforms area of the Advanced Solution Search page.

      Search Solutions

14. To view search results of **solutions**, click the Search Related Solutions button.

   The Advanced Solution Search Results page appears.

   For more information about related solutions, see About Advanced Solution Search Results, page 3-22.

   Search Related Solutions

15. To view search results of **related solutions**, click the Search Related Solutions button.

   Note: By default, the Search Related Solutions option is not available. Your administrator can make this option available through personalization.

   The Advanced Solution Search Results page appears.

   For more information on related solutions, see About Advanced Solution Search Results, page 3-22.

Related Topics

About the Matching Statements Page, page 3-21

About the Related Statements Page, page 3-21

About Advanced Solution Search Results, page 3-22

About the Matching Statements Page

You can reach the Matching Statements page from different approaches or contexts:

- **From the Advanced Solution Search page**. The Matching Statements page shows published statements from that knowledge base that match search criteria that you specified, such as from the Advanced Solution Search page. You access the Matching Statement page by clicking the Match Statement icon on the Advanced Solution Search page.

  For more information, see Using Advanced Solution Search, page 3-16 and About Using Matching Statements with Advanced Searches, page 3-21.

- **From either the Create Solution page or the Update Solution page**. When you have completed or updated a statement and have clicked the Apply button. Oracle Knowledge Management automatically searches the knowledge base for possible matching statements to prevent duplicate statements from being added to the knowledge base. Results appear on the Match Statements page, which shows statements that might or might not be useful to the solution. You can optionally include any matching statements. When you access the Matching Statements page from the Create Solution or Update Solution page, you cannot change the search criteria.

  For more information, see Create a Solution, page 4- 4 .

About Using Matching Statements with Advanced Searches

When you are performing advanced solution searches, you can perform the following from the Matching Statements page:

- Add a matching statement to your Advanced Solution Search criteria by clicking the Select option button next to the statement and clicking the Add button. The select statement appears on the Advanced Solution Search page.

- Clear the original criteria and replace it with the selected criteria by clicking the Replace button.

- Edit the criteria on the Matching Statements page by adding or editing text in the Search field or choosing another Type.

- Return to the Advanced Solution Search page without applying any matching statement criteria by clicking the Cancel button.

Related Topics

About the Related Statements Page

The search for related statements finds all other statements that have been previously linked to the matched statement. The Related Statements page displays the results based on:

- **Score**: The strength or weight of the link.

- **Description**: A full statement that describes the related statement.

- **Type**: The statement type, such as symptom, cause, or action.

- **Visibility**: Who can see the statement.

- **Number**: Statement number.

- **Link Count**: The number of linked statements to the related statement. By default, this is a hidden column. The administrator can configure this page to display the Link Count.

- **Updated**: The most recent date that someone updated the related statement.

From the Related Statements page, you can add a selected related statement to Advanced Solution Search criteria.

For more information, see Using Advanced Solution Search--Agent, page 3-16.

Related Topics

About Advanced Solution Search, page 3-17

Search for Solutions Using Advanced Solution Search, page 3-18

About the Matching Statements Page, page 3-21

About Advanced Solution Search Results, page 3-22

About Advanced Solution Search Results

From the Advanced Solution Search results page, you can:

- **Create a solution**: Click the Create a Solution button to create a new solution that includes **all** the search criteria--both included and not included. The search criteria appear on the Create Solution page. You can remove any criteria as you create the solution.

  For more information, see Create a Solution, page 4- 4 .

- **Search criteria**: Click the Search Criteria page to return to the Advanced Solution Search Result page.

- **View matching solutions**. The list of matching solutions area comprises:

  - **Select**: Option button lets you select one solution to display statements in the area below the list of solutions.

  - **Score %**: Shows how closely the results match the query.

  - **Title**: Indicates the solution title.

  - **Solution Number**: Indicates the solution identification number.

  - **Usage**: Shows how many times users have indicated the a solution is **useful**.

      Note: By default, the Usage data does not appear. Your administrator can make it available through personalization.

  - **Updated Date**: Indicates the most recent date that someone updated the solution.

      Note: You can sort the listing of solutions by clicking the column heading of the Score%, Title, Solution Number, or Updated Date column.

- **View corresponding statements.** Following the list of solutions is the statements area. The statements area shows you statements that correspond to the solution that you selected. From the statements area, you can select one or more statements and:

    - **Add selected statements as criteria to the search criteria**: Click the **Add to Search Criteria** button. The Advanced Solution Search page appears with the selected statements added as criteria. You can review or modify the criteria before performing a new search. For more information on specifying criteria, see Using Advanced Solution Search, page 3-16.

    - **Search with additional statement criteria**: Click the **Search with this additional criteria** button to perform a search using the selected statements as criteria plus any previously indicated criteria. Oracle Knowledge Management automatically adds additional criteria. The Advanced Solution Search Results page appears.

    - **View the full solution**: Click the Full Solution button to view all of the main components of the selected solution. For more information on solutions, see Managing Solutions, page 4- 1 .

    - **View the statement**: Click the View icon to display the statement's details.

        Note: Click the **Return to Search** link to return to the Advanced Solution Search Results page.

Related Topics

About Advanced Solution Search, page 3-17

Search for Solutions Using Advanced Solution Search, page 3-18

About the Matching Statements Page, page 3-21

About the Related Statements Page, page 3-21

Working with Statements

A solution consists of a series of statements. For example, the default solution type, Symptom-Cause-Action (SCA), includes the following statements: a symptom statement, a cause statement, and an action statement. By searching for a statement, you can find the related solutions that include that statement.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security, page 9- 1 .

Topics in this section include:

- Search for Statements, page 3-24
- Edit Statements, page 3-25
- View Statement Detail Page, page 3-25

Related Topic

Create a Solution, page 4- 4

Search for Statements

Typically, knowledge workers and administrators search for statements to find related solutions. The 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 Statement page.

Use the following procedures to search for statements.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Knowledge tab > Statements...Search Statement page

Steps

1. In the Search Statement page, enter some known information to narrow your search:

   • **Search**: Enter free-form text criteria, including statement number.

   • **Type**: Indicates the statement type that is assigned to a statement when a statement was created.

2. Click Go.

   Results appear on the Search Statement Results page.

3. To sort the results, click the column heading for Score%, Number, or Type.

   Statement Search Results

   The Statement Search results appear in a summary table and include:

   • **Score**: Shows how closely the results match the query

   • **Number**: Indicates the statement number.

   • **Type**: Indicates the statement type.

   • **Summary**: Indicates a summary of the statement.

   • **View**: Click the View icon to see statement details and related solutions.

   Related Topics

   Edit Statements, page 3-25

   View Statement Detail Page, page 3-25

Edit Statements

You can edit or update statements to change the Visibility, Summary, or Details. In a global update, if an update occurs to a statement that is shared across category groups, the update impacts only the current category group.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Search for the Statement. For more information, see Search for Statements, page 3-24.

Navigation

Knowledge > Knowledge tab > Statements...Search Statement page

Steps

1. On the row where the statement search results shows the statement that you want to edit, click the View icon.

   The Statement Detail page appears.

2. Click the Update button.

3. Make any changes to:

   • **Visibility**: Choose from the list.

   • **Summary**: Edit the text field.

   • **Detail**: Edit the contents, export or import contents, change the font or style if you are using the Rich Text Editor. For more information, see About the Rich Text Editor, page 4- 9 .

4. Click the Apply button to save your changes.

Related Topics

Search for Statements, page 3-24

View Statement Detail Page, page 3-25

View Statement Detail Page

Note for online Help: If you prefer information about viewing related solutions, click View Related Solutions, page 3-16.

The statement detail page provides information about a statement and lists the solutions utilizing the statement.

The main parts of the statement detail page are:

• **Header**: Information identifying the statement and its history appear in the header. In addition to a summary, the header includes:

   • **Number**: Indicates statement number.

   • **Type**: Indicates statement type.

   • **Visibility**: Indicates who can access the statement.

- **Status**: Indicates whether the statement is Draft or Published.

- **Created**: Indicates when the creation date of the statement.

- **Summary**: Displays the same summary that appears in the header.

- **Details**: Indicates the content type--for example, HTML--and any additional descriptions of the statement.

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

- **Related Solutions**: Lists the solutions that the use statement. Click the View icon to view the solution detail page.

    For more information, see About the Solution Detail Page, page 3-13.

    > **Note:** Knowledge administrators can perform global updates from this page by clicking Update.

Copy as New

When you access the Statement Details page from Create Solution or Update Solution page, a Copy as New button is available. The Copy as New button lets you create a new statement by making a copy of an existing statement.

Related Topics

Search for Statements, page 3-24

Edit Statements, page 3-25

Set Up Definitions for Frequently Used Solutions

The main areas where you access Frequently Used Solutions include:

- **Browsing the solutions**: You can filter solutions by a different time frame. For more information, see Browse Categories, page 3-12.

- **iSupport**: You can view a list of Frequently Used Solutions, which is a list of solutions that have been used within a specified time period. You--the administrator--define and maintain these time periods in Oracle Knowledge Management. In addition, you set the default time period or definition in Oracle Knowledge Management.

The number of definitions should be manageable and each definition should have a descriptive name that is easy to understand. The maximum number of days that you can define for a time interval is 5,000.

The following example shows how an administrator could set up the time intervals for frequently used solutions.

Example: Definitions for Frequently Used Solutions

A knowledge administrator needs to create definitions for viewing frequently used solutions so that users accessing the knowledge base can have multiple values from which to choose. The company has determined that the most logical breakdown for the definitions is in 30 day rolling increments and has decided to limit the definitions to 90 days or less. Accordingly, the knowledge administrator creates the following definitions: **The last 30 days**, **The last 60 days**, and **The last 90 days**.

The following procedures describe how to add a definition.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Oracle Knowledge Management administrators with update permission (CS_Freq_Used_Def_Update) can add or update frequently used definitions.

Navigation

Knowledge > Setup > Frequently Used Definition...Frequently Used Definitions page

Steps

1. In the Default column, select the time period that you want to use as a default time period.

2. Click Update.

3. To add a new time period, click Add.

   The Add Definition page appears.

4. Type the new name, description, and number of days.

5. Click Save.

6. To remove a time period, select the Remove check box.

7. Click the Update button.

About Index Synchronization

Searching solutions is based on Oracle Text. When you perform a search in Oracle Knowledge Management, a search for keywords runs against an index of all of the solutions that have been added to the index.

Newly published solutions are not automatically indexed into the search process, which means that although a solution has been approved for publishing, it might not be searchable. Knowledge Administrators should run the Oracle Knowledge Management Index Synchronization program to add newly published solutions to the index. The **Knowledge: Index Content As Soon As Possible** profile option is available to re-index as soon as possible to make newly published solutions almost immediately available.

There is a trade-off to using the **Knowledge: Index Content As Soon As Possible** profile option. Indexing content as soon as possible increases the rate of fragmentation of the index, which over time slows the search performance. It is recommended to periodically run the synchronization index programs or request set in either **optimize** or **optimize full** mode to defragment the index. For more information, see the Oracle Text documentation on index optimization. It is recommended to run the synchronization index programs or request set in either **optimize** or **optimize full** mode even without this profile option being on. With the profile option on, however, you may need to optimize the indexes more frequently.

Synchronize Indexes

If an existing published solution is revised and republished, users cannot search for the solution until you run the index synchronization program.

You must run the request set **Knowledge Management: index synchronization set** with the "S" mode to synchronize the index. You must do this for the solution index, the statement index, and the category index. This is required to retrieve solutions in Knowledge Management.

The request set executes the following concurrent programs internally:

- Knowledge Management Category Index Synchronization

- Knowledge Management Forum Messages Index Synchronization

- Knowledge Management Solution Index Synchronization

- Knowledge Management Statement Index Synchronization

To synchronize all of these indexes, you can run the request set so that you do not have to run each of those programs separately. Of course, if you need to manage just one of the indexes, you could run only the specific index synchronization program.

For the new concurrent programs to appear in a user's request submission window, you must add the new concurrent programs to the request groups. See the following topic on how to add new concurrent programs to the request groups.

Add New Concurrent Programs to Request Group

A **request set** is a group of concurrent requests. The Knowledge Management Index Synchronization Set is a request set that contains the following concurrent programs:

- Knowledge Management Solution Index Synchronization Program

- Knowledge Management Statement Index Synchronization Program

- Knowledge Management Solution Category Index Synchronization Program

- Knowledge Management Forum Message Index Synchronization Program

- Knowledge Management Index Synchronization Set

When you add a concurrent program or request set lines on the Forms window to manage the request group, you choose from a list whether you are adding a **Set** or a **Program**. The Knowledge Management Solution Index Synchronization Set is a set, while the others are programs.

The following steps describe how to add a concurrent program to the System Administrator Reports request group.

Module

Oracle Applications

Login

System Administrator

Navigation

Security > Responsibility > Request

Steps

1. Go to the System Administrator responsibility.

2. Search for group System Administrator Reports.

3. After retrieving the System Administrator Reports group, add the **Knowledge Management Solution Index Synchronization Program** to it.

4. Save the record.

5. Repeat steps 3 and 4 for each new concurrent program.

6. Repeat steps 3 and 4 to add the new request set.

About Searching with Integrated Modules--Agent Flows

A number of modules within the Oracle E-Business Suite integrate with Oracle Knowledge Management, allowing users to search the knowledge base from other module. The modules that appear in this section relate to the agent-facing flows in Oracle Knowledge Management.

Topics in this section include:

- About Searching from Integrated Modules--Agent Flows, page 3-29

- About the Apply Task Group Template Page, page 3-30

Customer Flows

For information about integration with customer-facing flows, see About Searching with Integrated Products--Customer Flows, page 10-10.

About Searching from Integrated Modules--Agent Flows

Table 3–1 lists Oracle E-Business Suite modules that integrate with Oracle Knowledge Management searches by way of agent flows.

For information on Oracle E-Business Suite modules that integrate with Oracle Knowledge Management by way of customer flows, see Searching with Integrated Products--Customer Flows, page 10-10.

Table: Search Integrations from Agent Flows

E-Business Suite Module	Search Integrations
Oracle TeleService	TeleService users access Oracle Knowledge Management through the Service Request function in TeleService.
	For more information, see the *Oracle TeleService User Guide*.
Oracle Depot Repair	Depot Repair users can access Oracle Knowledge Management through the Repair Orders function in Depot Repair.
	For more information, see the *Oracle Depot Repair User Guide*.
Oracle eMail Center	eMail Center users access Oracle Knowledge Management data from eMail Center.
	For more information, see the *Oracle eMail Center User Guide*

About the Apply Task Group Template Page

The Apply Task Group Template page applies **only** to the **Depot Repair-Knowledge Management integration flow**.

The Apply Task Group Template page shows you:

- The template that you are trying to apply. By applying a task template, you are creating the tasks that are in the template.

- The object that you are trying to apply the tasks towards (usage) and the object identifier (reference number) for which these tasks are being created.

On the Apply Task Group Template page, you specify an owner of the tasks that you are creating. The owner can be of different type.

For information about the Service Request-Knowledge Management integration flow, see the Service Request product documentation.

From an integration, the task templates that relate to the integration object appear on the View Solution page and a Take Action icon is available. For example, from Depot Repair, you can take action on the task template that relates to Depot Repair.

When you click the Take Action icon, the Apply Task Group Template page appears. You can:

- Specify the Owner Type.

- Search for and select an Owner.

4

Managing Solutions

This chapter covers the following topics:

- About Managing Solutions
- Create a Solution
- Submit a Solution for Reviews and Updates
- Working with Solutions in Progress
- Set Up Recommended Solutions
- Set Up Note Token Rules or AutoLinks

About Managing Solutions

Solutions are a collection of statements and other data which, when organized together, provide users with valuable knowledge that can help users in solving product- and service-related issues. Statements can be either unique to a solution or shared with other solutions.

The following example shows an example of a solution and what the solution contains.

Example: Solution Contents

An electronics manufacturer creates a solution with the title **My Monitor is not Working**. This solution contains statements that help resolve issues with a monitor:

1. Statement: Monitor screen is blank.
2. Statement: Monitor is not plugged into computer.
3. Statement: Plug monitor into computer and reboot.

In the preceding example, you can make distinctions about the statements by using **statement types**. Statement types help to describe or classify statements. For example, statement 1--Monitor is blank--is a **symptom statement**. Statement 2--Monitor is not plugged into computer--is a **cause statement**. Statement 3--Plug monitor into computer--is an action statement.

Other Solution Information

In addition to statements, solutions can contain additional information to help users identify and organize knowledge including:

- Solution Title, page 4- 2

- Categories, page 4- 2
- Solution Type, page 4- 2
- Visibility Level, page 4- 2
- Categories, page 4- 2
- Items, page 4- 3
- Platforms, page 4- 3
- Attachments, page 4- 3
- Task Group Templates, page 4- 3
- External Objects, page 4- 3

Solution Title

Use a solution title to help users identify a solution in the knowledge base.

Categories

You use categories to organize solutions into logical groupings. Using the analogy of a library, you could:

- Characterize fiction as a category.
- Characterize mysteries and classics as subcategories.
- Compare book titles to solutions.

Solution Type

You categorize solutions into **solution types**. Solution types help organize solutions within the knowledge base. Depending on the solution type, solutions contain one or more mandatory statements and can include optional statements. For example, the default solution type, Symptom-Cause-Action (SCA), consists of the following mandatory statements: a symptom statement, a cause statement, and an action statement.

Visibility Level

Upon creation of a solution or statement, the author specifies a Visibility Level. Along with user access levels, the Visibility Level makes it possible to control which solutions and statements a particular user can access during a search. This allows companies to add information to the knowledge base that can be critical in helping employees do their jobs, but might not be appropriate for customers to see.

Visibility Levels include:

- **Restricted** (highest security): A solution that only users with restricted permission can view. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.
- **Internal**: A solution that users with internal or restricted permission can view. This Visibility Level identifies solutions that internal users within a company can view.
- **Limited**: This Visibility Level has the same effect as internal distribution. The Limited Visibility Level is a way for companies to identify solutions that can be distributed manually to external customers through a mechanism, such as e-mail. To maintain backward compatibility, this level is available as a seeded Visibility Level only if you are upgrading from an earlier release of Oracle Knowledge Management.

- **External** (lowest security): A solution that users with external, internal, or restricted permission can view. This Visibility Level identifies solutions that internal users within a company and external customers can view.

Although there are four Visibility Levels in effect, there are only three since Internal and Limited are the same. The Internal and Limited assignments are a way for companies to designate the solutions that are intended for internal audiences.

Items

You use products to help identify which items (products) that a solution may impact. For example, in the preceding monitor example, it might be helpful to add all monitors that the company sells to the solution.

Platforms

You use platforms to help identify which platforms that a solution may impact.

Typically, computer industry companies might use platforms. You can display or hide the Platform attribute through personalization, a means of customizing the way Oracle Knowledge Management pages appear.

Attachments

You use attachments to supply additional documentation that can be helpful to the solution. An example of attachment is a document, such as a white paper on a related topic.

Task Group Templates

Knowledge administrators use Task Group Templates to attach a task to a solution. These tasks help automate the service process. While solutions help describe how to fix a problem, tasks provide actions to fix the problem. An example of a task is Schedule an engineer to repair problem.

External Objects

You use external objects to indicate additional solution-related objects in the database, such as a service request or a repair order. Other modules that call on the solutions in Oracle Knowledge Management require external linking. For reference, you may find it useful to see other solution-related objects in the database.

About Solution Life Cycles

Solutions and statements have a status attribute that describes the phase of review that the solution has gone through. Typical solution statuses are: Draft, Under Edit, Technical Review, Editorial Review, Obsolete, and Published.

The following figure shows the solution life cycle from formulation of an idea for a solution, through review and publishing, and ultimately to when the solution is no longer relevant and becomes obsolete.

Figure: Solution Lifecycle Process Diagram
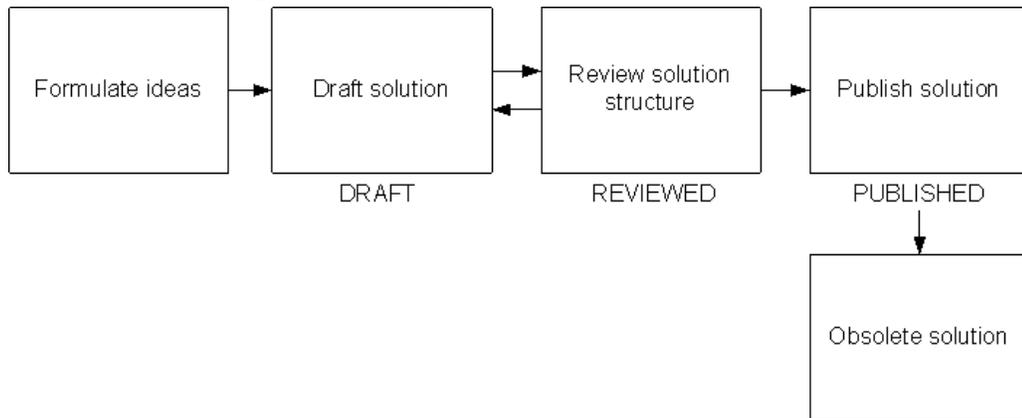
You use the status of a solution in the authoring flow process. You associate each status with a step in an authoring flow and only users that are members of a **user group** who are assigned to that authoring flow and that step can modify the solution. When you review a solution, you can select the next step in the flow, bypass several steps if you are a member of multiple steps resource group, or reject the solution to any of the previous steps.

A statement can either be in the Draft status or Published status. When a solution is in a Draft status, any newly created statements are also in the Draft status. When a you publish a solution, you also publish the draft statements. You can reuse published statements in other solutions.

Create a Solution

Knowledge workers author and create solutions in the knowledge base. Since solutions are a response to a problem, it is critical to ensure that the statements included in the solution are correct.

The following procedures guide you through the process of creating a new solution. Those who are updating a solution, should refer to this section for information about parts of a solution. For other information about updating a solution, see Update a Solution, page 4-15.

The areas of creating a solution include:

- Specify the Solution Header, page 4- 5

- Create and Add a Statement, page 4- 5

- Add a Related Category, page 4- 6

- Add a Related Item, page 4- 7

- Add a Related Platform, page 4- 7

- Add an Attachment, page 4- 7

- Add a Task Group Template, page 4- 8

- Add an External Object, page 4- 8

- Save the Solution, page 4- 8

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring > Solutions in Progress page

Steps

Specify the Solution Header

1. Click the Create Solution button.

   The Create Solution page appears.

2. Required: Enter a Title.

   Note: Whenever you change the solution type, the system runs a compatible statement check. A warning appears for any statements that are not compatible with the selected solution type.

3. Choose a Type from the list.

   Note: To save and submit a solution to an authoring flow, you must create and save the mandatory statement types. Without including the mandatory statement types, you can only save a solution and not submit it to an authoring flow.

4. Choose a Visibility from the list.

   For example, your choices can include: **Internal**, **Limited**, **Restricted**, or **External**. You can view one or more of these values depending on your access level.

   Create and Add a Statement

5. To create a statement, click the Create Statement button.

   The Create Statement page appears.

   Note: You could have multiple statements for a given type. For example, you might have multiple causes--and thus, multiple cause statements--in a given statement.

6. In the Summary area, specify:

   • **Type**: Choose from types, such as: Action, Cause, Changes, Objective, or Symptom.

   • **Visibility**: Choose either External or Internal.

   • **Summary**: Describe the statement according to the type that you chose. You can enter, paste, or import text into the Summary area. The limit is 500 characters. The Summary field accepts only plain text contents.

7. In the Detail area, specify the Content Type:

- HTML

- HTML with AutoLinks

- Text

- Text with AutoLinks

  Note: A Rich Text Editor is available that lets you perform editing and style tasks. If you have enabled the Rich Text Editor, then the editor automatically appears when you choose either the HTML or the HTML with AutoLink's Context Type. For more information, see About the Rich Text Editor, page 4- 9 .

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

  For more information about AutoLinks, see Set Up Note Token Rules or AutoLinks, page 4-23.

8. In the Detail area, do one:

   - Enter any information that you require.

   - Import text into the Detail area by clicking the Import Text button and following the prompts to select and import your source text file. The text contents appear in the Details area.

   - Export text from the Detail area by clicking the Export Text button and following the prompts to specify location and file name.

     > **Note:** The Statement Detail area has a 32K size limit. If you exceed the 32K size limit, the contents convert to a read-only text display. You can include up to 4 gigabytes of content in the Statement Detail area. If you need to update statement details that are greater than 32K, then use the Export and Import feature to update or replace the detail contents.

9. When you have completed the statement, click the Apply button.

   Oracle Knowledge Management automatically searches the knowledge base for possible matching statements to prevent duplicate statements from being added to the knowledge base. Results appear on the Match Statements page, which shows statements that might or might not be useful to the solution. You can optionally include any matching statements.

   When you access the Matching Statements page from the Create Solution or Update Solution page, you cannot change the search criteria.

   1. To include any matching statements, select the statement and click the Select button.

   2. To not include any matching statements, click Skip.

   Add a Related Category

10. Required: To add a **related category**:

    1. Click Add Categories. The Add Categories page appears.

    2. Navigate and expand the category hierarchy to display categories and subcategories.

3. Choose one or more categories by selecting the check box of each category that you consider to be a related category.

   Tip: To select all categories and subcategories, click the Select All link. To select no categories, click the None link. Any previously selected categories and subcategories are no long selected.

4. Click the Select button. The selected categories appear on the Create Solution page.

Add a Related Item

11. Optional: To add a **related item**:

   1. Click Add Items. The Add Items page appears. You must search for an item or product.

   2. In the Search area, enter search criteria for Name or Description and click the Go button. Results appear in the area that follows.

   3. To view additional items, if any, click the Next or Previous links.

   4. Choose one or more items by selecting the check box of each item that you consider to be a related item.

      Tip: To select all items, click the Select All link. Selected check boxes appear next each item **on that page only**. To select no items, click the None link.

   5. Click the Select button. The selected items appear on the Create Solution page.

Add a Related Platform

12. Optional: To add a **related platform** (if available):

   1. Click the Add Platforms button. The Add Platforms page appears. You must search for a platform.

   2. In the Search area, enter search criteria for Name or Description and click the Go button. Results appear in the area that follows.

   3. To view additional platform, if any, click the Next or Previous links.

   4. Choose one or more items by selecting the check box of each item that you consider to be a related platform.

      Tip: To select all platform, click the Select All link. Selected check boxes appear next each platform **on that page only**. To select no platforms, click the None link.

   5. Click the Select button. The selected platforms appear on the Create Solution page.

Add an Attachment

13. Optional: To add an **attachment**:

   1. Click the Add Attachments button. The Add Attachment page appears.

   2. Complete the Attachment Summary Information area by entering or pasting text in the Description field.

   3. In the Define Attachment area, click the Browse button to specify the location and file name of the attachment.

   4. To add the attachment to the statement, click the Apply button.

5. To add another attachment to the statement, click the Add Another button.

Add a Task Group Template

14. Optional: To add a **Task Group Template**:

    1. Click the Add Task Group Templates button. The Add Task Group Templates page appears.

    2. Search for the Task Group Template by specifying search criteria in the Template Group ID or Template Group Name fields and click Go. Matching results appear in the area that follows.

    3. To view additional Task Group Templates, if any, click the Next or Previous links.

    4. Choose one or more Task Group Templates by selecting the check box of each Task Group Template.

       Tip: To select all items, click the Select All link. Selected check boxes appear next each item **on that page only**. To select no items, click the None link.

    5. Click the Select button. The selected Task Group Templates appear on the Create Solution page.

Add an External Object

15. Optional: To add an **external object**:

    1. In the External Objects area, choose a module or external reference from the Add list. For example, your choices might include Depot Service Codes, Depot Repair, or Service Requests. For more information about the respective object, see the corresponding product documentation.

    2. Click Go. The Add External Objects page appears.

    3. In the Search area, enter search criteria in the available fields. In addition to the Description field, other search fields vary according to the product or external reference that you chose.

    4. Click Go. Matching results appear in the area that follows.

    5. To view additional external objects, if any, click the Next or Previous links.

    6. Choose one or more external objects by selecting the check box of each item that you consider to be a related item.

       Tip: To select all items, click the Select All link. Selected check boxes appear next each item **on that page only**. To select no items, click the None link.

    7. Click the Select button. The selected external objects appear on the Create Solution page.

Save the Solution

16. Click the Save button.

    When you create a new solution, it has a Draft status. The Authoring Comments area appears in the statement. Later, those who review and approve a solution can add comments to the Authoring Comments area.

    > **Note:** To edit a solution, besides belonging to the user group, you must be able to access the solutions and be able to see all the statements in the solutions.

You can review, add, update, or detach objects in the solution by clicking the area's corresponding Add, Update, Remove, or Detach buttons or icons.

When you create or submit the solution, the system assigns the statement a statement number, and the statement's status changes to Published.

About the Create Statement and Update Statement Pages

On both the Create Statement and the Update Statement pages, you have the following areas for creating or updating statements:

- **Summary**: Specify the Type and enter a Summary description. Statement Types can include: Action, Cause, Changes, Objective, or Symptom, for example. Typical Visibility choices can include: External or Internal. The Summary field has a 500-character limit. You can enter only plain text in the Summary field.

- **Detail**: In more detail than the Summary description, enter or import contents about the statement. You can also export the Detail contents to a file. You specify whether the Detail contents is plain text or HTML, and with or without AutoLinks. For more information, see the following subtopic, About the Rich Text Editor.

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

The Statement Detail area has a 32K size limit. If you exceed the 32K size limit, the contents convert to a read-only text display. You can include up to 4 gigabytes of content in the Details area. If you need to update statement details that are greater than 32K, then use the Export and Import feature to update or replace the detail contents.

The solution details appear as embedded in authoring flow notifications.

About the Rich Text Editor

The Rich Text Editor lets you make styling and editing choices, including:

- Font.

- Font color.

- Font size.

- Viewing the HTML source.

- Cut, copy, and paste.

- Bold, italic, and underscore.

- Flush left, flush right, or centered text alignment.

- Numbered or bulleted lists.

- Increasing or decreasing the text indent.

- Creating hyperlinks.

     Note: The Rich Text Editor works only in a browser that supports IFRAMEs. If your browser does not support IFRAMEs, then a plain text area appears instead of the Rich Text Editor.

Submit a Solution for Reviews and Updates

Authoring flows are unique to each company. Some companies have authoring flows that require a series of technical and editorial reviews and approvals before you can publish a solution, for example. On the other hand, other companies, might not have any requirements to publish a solution. The following topics generally assume that you have set up solution authoring flows that require reviews, editing, and approval before publishing

When you create a solution and submit it to an authoring flow, an Oracle Knowledge Management internal user in the assigned user group at each step can either approve the solution to the next step with or without modifications, or reject the solution to any of the previous steps of the flow. Members of a user group assigned to the next step or previous step receive a notification that a solution is ready for review.

Topics in this section include:

- Preview Solution for Submission, page 4-10

- About Authoring Flows, page 4-11

- Specify Authoring Flows, page 4-12

- Specify Authoring Step, page 4-13

- Set Up Subscriptions, page 4-14

- Update a Solution, page 4-15

- Review or Add Review Solution Comments, page 4-17

Preview Solution for Submission

When the solution is ready for submission, you can preview the solution to see how it looks like after you submit it. This gives you a chance to review the overall appearance of the solution and correct any mistakes that you have made. Solutions are ready for submission if they have the required information, such as the mandatory fields and the mandatory statements. For example, a Symptom Cause Action statement requires statements for each statement type, symptom, cause, and action.

To preview a solution for submission, click the Preview for Submission button from either the Create Solution page or the Update Solution page. The Submit: Preview Solution page appears.

For more information, on creating or updating solutions, see Create a Solution or , page 4- 4 Update a Solution, page 4-15.

From the Submit: Preview Solution page, you can:

- View your draft solution in a formatted layout. This includes all statements, attachments, Task Group Templates, external objects, authoring comments, related categories, related items, and related platforms.

    Note: To view a list of external objects, you must choose the type of objects from the View list.

- Return to the solution by clicking the Return to Solution button.

- Specify the authoring flow, if applicable. If the solution is not in an authoring flow, click the Continue button. The Submit: Select Authoring Flow page appears. For more information, see Specify Authoring Flows, page 4-12.

  To make more modifications to the solution, you can return to the Create or Update Solution page by clicking the Return to Solution button.

  > **Note:** The Continue button opens different pages depending on whether or not the solution is in a flow.

- Specify the authoring flow step. If the solution is already in the flow, click the Continue button. The Submit: Select Flow Step page appears. For more information, see Specify Authoring Step, page 4-13.

About Authoring Flows

The authoring flow can be one step, such as publish, or it can be as complex as a business requires.

The following example describes an authoring flow.

Example: Authoring Flow

1. An author creates a solution on the Create Solution page. The author saves the solution. The saved solution becomes a work-in-progress solution and has a Saved status. The author can see the saved solution on the Solutions in Progress page.

2. An author can continue to work on the author's own solution-in-progress solution. After completing the solution, the author can click the Preview for Submission button from the Solution Detail page.

3. The Preview Solution page appears. The author can see how the solution would appear to others for review or upon publishing. If everything appears to be OK, the author clicks the Continue button. The Submit: Select Authoring Flow page appears. The author chooses an appropriate workflow from the list.

4. The members of the resource group assigned to the authoring flow step that the author selected receive notification of the solution that needs a reviews. Members who want to receive a notification must subscribe to a category or a product in the Subscriptions page. The solution must be related to the subscribed product or category.

5. Any member of the resource group can navigate to the Solutions In Progress page and search for the solution that is ready for review. After the member has found the solution, the member can click the Lock and Update button to lock the solution. No other member of the resource group can work on this solution until the member returns the solution to the authoring flow.

   > **Note:** If the person who had locked the solution is no longer available to unlock it to work on the solution to submit it to an authoring flow, an administrator can get the lock for a solution that another user has locked. Another reason why a user cannot update a locked solution can be due to Security changes. A concurrent program is available to unlock these types of locked solutions.

6. A member can review the solution, make edits, move the solution to the next step (to continue the current authoring flow), or reject the solution.

7. A member can select the next or previous step for the solution. If the solution is rejected to an author, then the solution appears in the Author's Solution in Progress page, and the author can lock and update the solution, review comments, make required edits, and submit the solution back to the authoring flow. The author or reviewer can specify the next appropriate step or choose another authoring flow.

8. When the solution is submitted to a step whose action is Publish, then the solution's status changes to **Published**.

For information on managing authoring flows, see Managing Authoring Flows, page 8-1.

Specify Authoring Flows

When you create a solution and are ready to submit it, you might have to assign an authoring flow to it. A profile option turns off the selecting of authoring flow. This topic assumes that the profile option requires the selection of authoring flows. Authoring flows define the steps through which a solution goes in the solution authoring flow process. Some authoring flows require review and approval of a solution before it becomes available for searching in the knowledge base. Other authoring flow might not require review or approval.

> **Note:** Authoring flows are unique to each company. Work flows that are in this document are examples only. Your workflow names, functionality, and choices may differ.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Assumption

You have not previously assigned an authoring flow to the solution.

Navigation

Knowledge > Authoring > Solutions in Progress...Solutions in Progress page

Steps

1. Locate the solution and display the Solution Update page. For more information, see Update a Solution, page 4-15.

2. Click the Continue button.

   The Submit: Select Authoring Flow page appears. You can also arrive at the Submit: Select Authoring flow page by clicking the Select Another Flow button on the Submit: Select Flow Step page. This flow allows you to select another flow to submit the solution. This may be required if the solution was submitted to a wrong flow to begin with, or if the solution requires further approval from other flows depending on the content change.

3. Select the authoring flow that you want to submit your solution for approval.

4. Click the Submit button.

The Solution Details page appears.

Specify Authoring Step

When you create a solution, have assigned an authoring flow to the solution, and have submitted the solution for review and approval, you or a reviewer need to make revisions and specify the next authoring step. For example, a reviewer might add comments or make corrections to the solution. During the review and update process, the reviewers specify the next step through which the solution needs to go when they have finished their reviews or modifications.

The first time when you submit a solution, you see the list of flow names to select. However, when you submit the solution to the flow the first time, it automatically selects the first step of that flow to submit to. The **next** time when you submit the solution, you will have a list of steps to submit the solution to, including the step of **Rejected to Author**. These steps belong to the previously selected flow. The next step of the flow appears by default, however the user can choose to reject the solution to author.

> **Note:** Authoring flows are unique to each company. Workflow choices and statuses that are in this document are examples only. Your work flows may differ.

For example, possible next steps could include:

- Rejected to Author
- Technical Review
- Editorial Review
- Ready for Publishing

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

You have assigned an authoring flow to the solution. For more information, see Specify Authoring Flows, page 4-12.

To publish or reject a solution to the next step or any previous step in an authoring flow, you must be a member of the solution's user group to whom that step is assigned.

You must be assigned the function to edit a solution in the draft status, to edit solutions in technical review status, and so forth.

Navigation

Knowledge > Authoring > Solutions in Progress...Solutions in Progress page

Steps

1. Locate the solution and display the Solution Update page. For more information, see Update a Solution, page 4-15.

2. Make your changes or updates to the solution.

   Note: You can also click Comments to view any comments attached to the solution.

3. Save the solution.

4. On the Preview for Submission page, click Continue.

   The Submit: Select Authoring Flow Step page appears. You have one the following choices:

   • Select the next authoring flow **step** and submit it. This choice lets you continue the review process with the current authoring flow. For example, if the revised solution requires an addition round of technical review, then you can choose the step for technical review. If the revised solution does not require any more technical reviews, you might choose the step for editorial review. If you are re-submitting a solution, you may have the choice of rejecting the solution to the author.

   • Click the Return to Solution button. You can resume reviewing or updating the solution.

   • Click the Select Another Flow button, to choose another authoring flow.

5. If you choose continue with the current authoring flow:

   1. Select the option button on the row that shows the next flow step for your solution.

   2. Click the Submit button. A confirmation message indicates that the solution has been updated and submitted to a particular authoring flow.

Set Up Subscriptions

Before you submit a solution through the authoring flow process, you and those who are involved with reviewing and approving the solution should ensure that you all can receive e-mail notification of the solution that needs review or approval.

To review and approve a solution, e-mail notification is an option. Hence, all participants need to make sure that they can receive the e-mail notification if they would like to be informed about solutions ready to be reviewed and approved by way of notification.

Authoring flows define the steps that a solution follows in the solution authoring process. After creating a solution and submitting it to an authoring flow, an Oracle Knowledge Management administrator, knowledge worker, or a customer service representative, in the assigned user group associated to the step that the solution is in, can approve or reject a solution to the next or previous step of the authoring flow.

Members of a user group can set up their own subscriptions, that is, choose one or more items (products) or categories on the Subscriptions page to receive a notification that a solution related to that product or category that is ready for review.

> **Note:** Earlier versions of Oracle Knowledge Management referred to Subscriptions as a Solution Authoring Profile.

Members who do not subscribe to any product or category, do not receive a notification, but they can search for all solutions in progress from the Solutions in

Progress page. For information on how to set up and monitor a workflow, see the *Oracle Workflow Guide*.

Any changes that you make to Subscriptions become effective only after you click Save. If you want to restore the old settings after you have made changes, you can click the Revert button **before** you save the changes.

> **Note:** The system sends e-mail notifications only if you have set up and properly configured the Workflow mailer. You can also use the PHP Self Service Workflow notifications page to view notifications. For more information, see the Workflow documentation on how to start and configure the workflow mailer.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring > Subscriptions tab...Subscriptions page

Steps

1. To add a category, click Add Categories.

   The Add Categories page appears.

2. Locate and select one or more categories, by expanding and navigating the listing of categories and subcategories and then selecting the category's check box.

3. Click the Select button.

4. The Subscriptions page shows all categories that you have chosen.

5. To add items (products), click Add Items.

   The Add Items page appears.

6. Specify search criteria in the Name or Description fields to locate items.

   Under the Name and Description columns, matching results appear.

7. Click the Select button.

   The Subscriptions page shows all items (products) that you have chosen. Whenever the workflow processes a solution that refers to any of the subscribed categories or items, you should receive notification.

Update a Solution

After you save a solution or have submitted for review and approval, you might want to return to it to view any authoring comments that others have made and make revisions.

During the review and update process, you--the author of a solution--and any reviewers need to lock and update the solution to make changes. Reviewers might add authoring comments to advise you of required changes, or they might directly update the solution. After you or any participants have updated and saved any changes, you can re-submit the solution and specify the next authoring workflow step.

If you need to update a solution that another person has locked and that person is not available, your administrator can reset obtain the lock by clicking the Get Lock button. Then, the administrator can resubmit the solution for you to lock and update.

All new and edited solutions must be approved for publication. When you submit a solution in an authoring flow to the step that has the **publish** action, the solution status changes to **Published**. After publishing the solution, it must be synchronized with the index to appear in the search process.

For information on the specific areas of a solution, see Create a Solution, page 4- 4 . You can access solutions from the Solutions in Progress page.

The following procedures describe how to locate and access an available solution so that you can update it.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

Internal Oracle Knowledge Management users with create permission (CS_Solution_Create) can create a solution.

Navigation

Knowledge > Authoring > Solutions in Progress...Solutions in Progress page

Steps

1. From the View list, choose an item:

    •   Solutions I'm currently working on.

    •   Solutions in progress that I can lock and update.

    •   All solutions in progress.

        You can only find solutions that you can update or lock and update by selecting either **Solutions I'm currently working on** *or* **Solutions in progress that I can lock and update**.

2. Click Go.

    Matching solutions appear based on the view that you chose.

3. On the row of the solution that you want to update, click the View icon.

    A view of the solution appears.

4. Click either the Update button or the Lock and Update button.

The Update Solution page appears. You can make your updates on this page. For example, you can edit the title, type, and Visibility; create or remove statements; change the sequence of statements; add or remove related categories, items, or platforms; add, update, or detach attachments; add or remove Task Group Templates; add or remove external objects; and add or review comments.

For more information review the options and procedures that are available in Create a Solution, page 4- 4 .

5. Click Save.

After you have completed your solution updates, you can preview it and submit it for submission. For more information, see Preview Solution for Submission, page 4-10.

Review or Add Solution Comments

Anyone with appropriate access to modifying solutions can review or add comments to a solution from the Solution Detail page. Comments are a communication tool for knowledge workers during the solution authoring process and are intended to help reviewers provide feedback on a solution during the review process.

With the correct Responsibility, you can add comments on the View Solution Detail page.

Comments accumulate through different versions of a solution until publishing of the solution. After solution publishing, you can no longer view the previous comments, but you can add new comments.

All newly added comments have a **Not reviewed** status, which reviewers can change when they approve the solutions.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring > Solutions in Progress...Solutions in Progress page

Steps

1. From the View list, choose an item:

   • Solutions I'm currently working on.

   • Solutions in progress that I can lock and update.

   • All solutions in progress.

2. Click Go.

Matching solutions appear based on the view that you chose.

3. On the row of the solution that you want to update, click the View icon.

A view of the solution appears.

4. Click the Update button.

    The Update Solution page appears.

5. In the Authoring Comments area, click the Add Comment button.

    The Add Comment page appears.

6. Enter your Comments.

7. Click the Apply button.

    The Update Solution page appears.

8. Click Save.

    The comment appears with a status of Not Reviewed. After the comment is reviewed, the status changes to Reviewed.

    Update the Status of a Comment to Reviewed

9. On the row that lists the comment, click the View icon.

    The Authoring Comment page appears.

10. In the Status field, choose Reviewed from the list.

11. Click the Apply button.

    The Update Solution page appears.

12. Click Save.

    For information on viewing solution details, refer to About the Solution Detail Page, page 3-13.

Working with Solutions in Progress

You can view or search for **solutions in progress** or draft solutions on the Solutions in Progress page. Solutions in progress include solutions that have been saved but have not been submitted for approval and solutions that have not been approved for publishing.

Topics about solutions in progress include:

*   About the Solutions in Progress Page, page 4-18

*   View Solutions in Progress, page 4-19

*   Search Solutions in Progress, page 4-20

About the Solutions in Progress Page

From the Solutions in Progress page, you can:

*   **Filter your view of solutions progress**: For more information, see Filtered Views of Solutions in Progress, page 4-19.

*   **Search for solutions in progress**: Click the Search button. For more information, see Search Solutions in Progress, page 4-20.

*   **Create a new solution**: For more information on solutions, see Managing Solutions, page 4- 1 .

- **Sort the view of solutions in progress**: Click any of these column headings to sort the list of solutions in progress accordingly: Number, Title, Type, Status, Locked by, Created, or Last Updated. Each time you click a column heading, the sort is either ascending to descending or descending to ascending.

- **View solution details**: On the row that lists a solution in progress, click the View icon to display the solution's details, including any authoring comments.

    > **Note:** Click the **Return to Solutions in Progress** link to return to the Solutions in Progress page.

Filtered Views of Solutions in Progress

The filtered views of your solutions in progress include:

- **Solutions I'm currently working on**: Includes the solutions that you have created but not submitted for approval, or solutions that you have locked for review but have not submitted for approval.

- **Other solutions in progress I can lock and update**: Includes the solutions that are pending approval that you can lock and update.

- **All solutions in progress**: Includes all solutions that either some users are editing or are pending approval.

View Solutions in Progress

When you navigate to the Solutions in Progress page, the default view shows the solutions on which you are currently working. On the Solutions in Progress page, you have filtered views of your solutions in progress. You can also search for solutions in progress.

Security settings impact your access to solutions. You can update a solution only if you have access to the solution--such as being able to access at least one of the categories--and you have access to all statements. If due to Security setup changes, you lose access to a solution, there is a unlocking concurrent program that removes the lock that some users hold. Unlocked solutions appear in the Solutions in Progress view, such that you can update the solutions.

> **Note:** The unlocking concurrent program is **different from** the Get Lock functionality. This Get Lock functionality unlocks solutions that someone has locked.

The following procedures describe how to access and view solutions in progress in Oracle Knowledge Management.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring tab > Solutions in Progress...Solutions in Progress page

Steps

1. Change the view by choosing a filter value from the View list:

    • **Solutions I'm currently working on**

    • **Other solutions in progress I can lock and update**

    • **All solutions in progress**

    By default, the Solutions in Progress page shows all the solutions on which you are working. These are solutions that you have saved but have not submitted for approval.

2. Click Go.

    The filtered results appear when the page Solutions in Progress automatically refreshes.

3. To view detailed information about a solution in progress:

    1. Click the View icon on the row of the listed solution. The solution's details appear.

    2. Click the Return to Solutions in Progress link to return to the Solutions in Progress page.

Search Solutions in Progress

You can filter Solutions in Progress by using the Search Solutions in Progress page.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Agent

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Authoring tab > Solutions in Progress...Solutions in Progress page

Steps

1. Click Search.

    The Search Solutions in Progress page appears.

2. Enter any one or more criteria to narrow your search of the solutions in progress:

    • **Number**: Searches for solution number entered by user.

- **Title**: Searches solution titles for key words.
- **Type**: Filters by solution types.
- **Status**: Filters by solution status.
- **Item**: Filters by product.
- **Created after**: Specifies a date after which solutions were created. Click the Calendar icon
- **Created before**: Specifies a date before which solutions were created.
- **Updated after**: Specifies a date after which solutions were updated.
- **Updated before**: Specifies a date before which solutions were updated.
- **Search only within Solutions I may update**: Select check box to show only solutions that you can update.
- Look for: (Select only one.)
    - **All Solutions**: Specifies all solutions regardless of checked-out status.
    - **Solutions not locked**: Specifies only solutions that are not locked.
    - **Specifies only solutions that a specific user has locked**: Specifies only solutions that a specific user has locked. Click the Flashlight icon to search for and select a user by either their Full Name or User Name.

3. Click Go.

   Results appear in the Search Results section of the page.

Review Solutions in Progress Results

Solutions in Progress results appear in a summary table and include:

- **Number**: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.
- **Title**: Indicates the solution title or solution summary. Users can click the title to drill down to the solution details.
- **Type**: Indicates the solution type.
- **Status**: Indicates where the solution is in the approval cycle.
- **Locked by**: Indicates the user that currently has locked the solution.
- **Created**: Indicates the solution's creation date.
- **Updated Date**: Shows the most recent date on which the solution or statement was updated.
- **View**: View the solution details. For more information, see About the Solution Detail Page, page 3-13.

Set Up Recommended Solutions

Recommended Solutions is a list of solutions that knowledge workers recommend for users to review. Users accessing iSupport can view a list of Recommended Solutions that is set up within Oracle Knowledge Management. For this list to be effective, you should actively manage it.

> **Note:** You can add only published solutions as recommended solutions.

The following example describes how a manufacturer might decide how to use Recommended Solutions.

Example: Recommended Solutions

A television manufacturer has determined that 80% of its service inquiries over the Web and telephone can be solved with ten solutions. Accordingly, the knowledge administrator populates the recommended solutions list with these ten solutions. Users accessing the knowledge base see these ten solutions in the Recommended Solutions view when accessing the knowledge base from Oracle iSupport.

Use this procedure to add or delete solutions from the recommended solutions list and select the sort order in which the recommended solutions appear.

Login

Self-Service

Responsibility

Knowledge Worker

Knowledge Administrator

Prerequisites

Obtain the solution number that you want to recommend. For more information, see:

Using Simple Search, page 3- 7 .

Using Advanced Solution Search, page 3-16.

Navigation

Knowledge > Authoring > Recommended Solutions...Recommended Solutions page

Steps

1. To add a solution to the list, click Add Solution.

    The Add Recommended Solution page appears.

2. Enter the Solution Number.

3. Click Apply.

    The solution appears on the Recommended Solutions page.

4. To view details about the solution:

    1. Click the Details icon this is next to the solution. The Solution Details page appears.

    2. Click the Return to Recommended Solutions link to return to the Recommended Solutions page.

5. To rearrange the position of a solution, click the Move Up or Move Down icon that is on the solution's row.

6. To delete a solution from the list, click the Remove icon that is on the solution's row, and click the Remove icon.

Set Up Note Token Rules or AutoLinks

Setting up Note Token Rules in Oracle Quality Online lets you define parsing rules and destinations for hyperlinking keywords in the Note Details appear. This is an **AutoLink** in Oracle Knowledge Management.

AutoLinks define a set of key token words, for example, **bug**, that maps to an HTML object in the database. If you have created the word **bug** as a Note Token Rule, when anyone authors a solution containing **bug** and an unique parameter (the bug number), for example, **bug: 10020**, Oracle Knowledge Management automatically creates a hyperlink to that object in the database.

AutoLinks let you create hyperlinks automatically to other objects in the database which is useful in building a knowledge base where information is linked together.

> **Note:** For statement details with content type **Text with AutoLink**, you cannot use these characters as preceding or following characters: **-** (hyphen), **.** (period), and (space).

> **Note:** However, you can use these characters as the preceding or following characters for statement details with content type **HTML with AutoLink**.

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

You can define different sets of Note Token Rules for agents and customers.

To leverage a token rule in Oracle Knowledge Management, you must map it to the Knowledge Base Solution object in the database. There are two types of objects to which you map the token rules. One object is **Knowledge Base Solution**, which applies to customers. The other object is **Knowledge: OA Solution**, which applies to Agents and Administrators. Existing rules are **not** mapped automatically during an upgrade. If you are using the same Note Token Rule for both customers and agents, then for Note Token Rules that you defined before the upgrade, you must map them to the new object, **Knowledge: OA Solution**.

You need a required special declaration for FND function that you use in a Note Token Rule. For rules that use the FND function, the function type needs to be of the **INTEROPJSP** type. The function definition also must include **&cskDLink=OA** in the function URL definition.

The following procedures describe how to create token rules.

Login

Self-Service

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 keyword to hyperlink in the Value field, such as a name for the linked text.

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 Token Value and Parameter, if any.

6. In the Parameter section, to 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 check boxes.

   If you do not select No Parameter, then the Following Characters, Minimum Length, and Maximum Length options are not allowed.

8. Enter your minimum and maximum length parameters.

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

   • **Function**: Choose a User Function Name using the list.

   • **URL**: Enter the base URL in the Base URL text field.

10. Click Create.

    The token rule appears on the Token Rules summary page.

    Map a Token Rule to an Object

11. To map a token rule to an object:

    1. Click the Mapping tab. The Token Rule Mapping page appears.

    2. Choose the Knowledge Base Solution value from the Object list and click Go. The values that have already been mapped to the object populate the page.

    3. In the Sequence field, type a number.

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

    5. Choose a Start Date.

    6. Choose an End Date.

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

5

Managing Solution Types

This chapter covers the following topics:

- About Solution Types
- Create a Solution Type
- Associate a Statement Type to a Solution Type
- Disassociate a Statement Type from a Solution Type
- View a Solution Type
- Update a Solution Type
- Delete a Solution Type

About Solution Types

Administrators create solution types to help describe and classify solutions within the knowledge base. When you create solution types, you assign a Name, Description, Start Date, and End Date. In addition, you define **mandatory statement types** to ensure that you classify solutions within that solution type and the solution types have a similar format. For example, Oracle Knowledge Management included the seeded Symptom-Cause-Action (SCA) solution type, which requires that any solution that you categorize as an SCA solution type contains a symptom statement, a cause statement, and an action statement.

A solution type should have a self-descriptive and intuitive name and should follow the merchant's naming conventions. Organizing solutions into solution types makes searching for solutions more precise and the results more effective. You can create an unlimited number of solution types for your company's specific needs, however, the knowledge base is more effective and easier to manage if you limit the number of solution types.

Examples of common solution types include:

- SCA (Symptom-Cause-Action)
- PR (Problem-Resolution)
- QA (Question-Answer)

Create a Solution Type

Oracle Knowledge Management includes the seeded Solution-Cause-Action (SCA) solution type. The Oracle Knowledge Management system prevents the creation of duplicate solution types. When you create a solution type, you must also associate at least one statement type to the solution type before you can use the solution type for creating solutions. The following procedure describe how to create a new solution type.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Oracle Knowledge Management administrators with edit permission (CS_Type_Edit) can create a new solution type.

Navigation

Knowledge > Setup > Create Type...Solution Types page

Steps

1. From the Type list, choose Solution.

2. In the Name field, type a name for the solution type.

3. In the Description field, briefly describe the solution type.

   The description of a solution type is only for administrators. Customers cannot view the description.

4. Specify the Start Date.

5. Specify the End Date.

   End-dating a solution type prevents any further solutions of this type from being created after the end date has occurred. Solutions currently in progress are allowed to complete. End-dating does not delete the solution type from the database.

6. Click Create.

   The Solution Type page displays a Related section to which you can add statements and external links.

   You must also associate at least one statement type to the solution type before you can use the solution type for creating solutions. 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.

7. To add a statement type to the solution:

   1. From the list that is in the Related area, choose Statement Type and click Go.

   2. Click the Add/Delete button. The Associate Statement Types page appears.

   3. From the Available Statements Types area, choose the desired statement type.

   4. Click the right arrow to assign it to the Selected Statement Types area. You can sort the selected statement types by clicking the Up or Down arrows.

5. Click Save to save the changes or click Cancel to restore the original values and return to the previous page.

Related Topics

Associate a Statement Type to a Solution Type, page 5- 3

Disassociate a Statement Type from a Solution Type, page 5- 4

View a Solution Type, page 5- 4

Update a Solution Type, page 5- 5

Delete a Solution Type, page 5- 6

Associate a Statement Type to a Solution Type

You can add additional statement types to a solution type.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup > Solution Types...Solution Type page

Steps

1. In the Type No. column, click the solution's hypertext link to which you want to associate a statement type.

   The Solution Type page appears.

2. Click the Add/Delete button.

   The Associate Statement Types page appears.

3. To add a statement type to the existing solution:

   1. In the Available Statement Types column, choose the desired statement type.

   2. Click the right arrow to add it to the Selected Statement Types column.

   3. To sort the selected statement types, click the Up or Down arrow.

4. Click Save to save the changes or click Cancel to restore the original values and return to the previous page.

Related Topics

Create a New Solution Type, page 5- 2

Disassociate a Statement Type from a Solution Type, page 5- 4

View a Solution Type, page 5- 4

Update a Solution Type, page 5- 5

Delete a Solution Type, page 5- 6

Disassociate a Statement Type from a Solution Type

You can disassociate a statement type from a solution type in the Associate Statement Types page.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup > Solution Types...Solution Type page

Steps

1. In the Type No. column, click the solution's hypertext link from which you want to disassociate a statement type.

   The Solution Type page appears.

2. Click the Add/Delete button.

   The Associate Statement Types page appears.

3. To remove a statement type to the existing solution:

   1. In the Selected Statement Types column, choose the statement type that you want to disassociate from the solution type.

   2. Click the left arrow to add it to the Available Statement Types column.

4. Click Save to save the changes or click Cancel to restore the original values and return to the previous page.

Related Topics

Create a New Solution Type, page 5- 2

Associate a Statement Type to a Solution Type, page 5- 3

View a Solution Type, page 5- 4

Update a Solution Type, page 5- 5

Delete a Solution Type, page 5- 6

View a Solution Type

Use this procedure to view existing solution types.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup > Solution Types...Solution Types page

Step

1. In the Type No. column, click the link to navigate to the Solution Type page for the selected solution type to view details.

2. Update the solution type and add or delete statement types or external links to this solution type. For more information, see:

   • Associate a Statement Type to a Solution Type, page 5- 3

   • Disassociate a Statement Type from a Solution Type, page 5- 4

   • Update a Solution Type, page 5- 5

   • Delete a Solution Type, page 5- 6

Update a Solution Type

Use this procedure to update an existing solution type.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

You must have edit permission (CS_Type_Edit) to edit a solution type.

Navigation

Knowledge > Setup > Solution Types...Solution Types page

Steps

1. Click Solution Type Number.

   The Solution Type page for that Solution Type Number appears.

2. To update the Name, Description, Start Date, or End Date of the Solution Type, enter the new information in the appropriate fields.

   Note: On the Update Solution Type page, in the Related Statement Type section, the Optional column check box indicates whether or not the statement type is optional. If you select the check box, the statement type is optional. When you associate a new statement type to the solution type, by default, its association is as an optional statement. By deselecting the check box, you are making the statement type mandatory.

3. Click the upper Update button.

   Note: The Solution Types page includes **two** Update buttons. The upper Update button applies **only** to changes that you make to Name, Description, Start Date, or End Date. The lower Update button is in the Related section and applies **only** to changes that you make to Statement Types or External Links.

4. To update the related statements types or external links, make the required selections.

5. Click one:

- Click the lower Update button to save the changes.
- Click Restore to return to the original values and not save the changes.
- Click Delete to delete the solution type.

Related Topics

Create a New Solution Type, page 5- 2

Associate a Statement Type to a Solution Type, page 5- 3

Disassociate a Statement Type from a Solution Type, page 5- 4

View a Solution Type, page 5- 4

Delete a Solution Type, page 5- 6

Delete a Solution Type

Use this procedure to delete a solution type. You **cannot** delete the default solution type, Symptom-Cause-Action (SCA). You can delete a solution type only if no solutions use it. You cannot undo this procedure.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Oracle Knowledge Management administrators must have edit permission (CS_Type_Edit) to delete a statement type.

Delete any statement types that are associated to this solution type

Navigation

Knowledge > Setup> Solution Types...Solution Types page

Steps

1. Click the numbered link of the solution type that you want to delete.

2. In the Solution Type page, ensure that there are no related statements types or external links listed in the Related sub section.

3. To remove related statement types:

   1. Click Add/Delete. The Associate Statement Types page appears. Disassociate the statement type from that solution type.

   2. Click Save. Solution Type page reappears with no statement types or external links appearing in the Related section.

4. After removing the related statement types, click Delete.

Related Topics

Create a New Solution Type, page 5- 2

6

Managing Statement Types

This chapter covers the following topics:

- About Statement Types
- Create a Statement Type
- View a Statement Type
- Update a Statement Type
- Delete a Statement Type

About Statement Types

A statement is a description of any aspect of a problem, its cause, or its resolution. Statements are organized into statement types.

A statement type is an identifying name associated with a particular part of the solution type. For example, symptom is a statement type within Symptom-Cause-Action solution type.

Statement types help organize statements by providing segmentation to the knowledge base. Statement types should have descriptive and intuitive names. A knowledge administrator can create an unlimited number of statement types for their company's specific needs, however, the knowledge base is more effective and easier to manage if you limit the number of statement types.

> **Note:** You can map statement types in Oracle Knowledge Management to note types in Oracle TeleService. If you map a statement type to a note type, and users access Oracle Knowledge Management through the Advanced Search from TeleService, the note types to which you mapped statement types appear as statement criteria in the Statement section of the Advanced Search page.

Create a Statement Type

The following procedures describe how to create a statement type.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisite

Oracle Knowledge Management administrators with edit permission (CS_Type_Edit) can create a new statement type.

Steps

1. Navigate to Setup > Create Type.

   The Create Type page appears.

2. In the Type list, choose Statement.

3. In the Name field, type a name for the statement type.

4. In the Description field, type a description for the statement type.

5. Specify the Start Date.

6. Specify the End Date.

   End-dating a statement type prevents any further statements of this type from being created after the end date has expired. Oracle Knowledge Management allows statements that are currently in progress to complete. End-dating does not delete the statement type from the database.

7. Click Create.

   The Statement Type page appears with a Related section. You can only associate the statement type to solution type from the View Solution Type page.

8. To relate this statement type to an external link (for example, a Note Type):

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

   2. Click Go.

   3. Click Add. The Select an External Object page appears.

   4. Click Note Type.

      Important: You should relate **one** statement type to only **one** note type!

   5. The Note Type page appears. Search for the note type that you want to add to this statement type. Specify **%** for a wildcard search. Search results appear.

   6. Select the note type that you want to add to the statement type.

   7. Click Update. The Statement Type page appears.

View a Statement Type

The following procedures describe how to access a statement type to view its details.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Internal users with view permission--CS_Statement_View--can view existing statement types.

Steps

1. Navigate to Setup > Statement Types.

   The Statement Types page appears.

2. Click the numbered link to navigate to the Statement Type page for the selected statement type.

Update a Statement Type

The following procedures describe how to update an existing statement type.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Oracle Knowledge Management administrators with edit permission (CS_Type_Edit) can edit a statement type.

Steps

1. Navigate to Setup> Statement Types.

   The Statement Types page appears.

2. Click the numbered link to navigate to the Statement Type page for the selected statement type.

3. Update the Name or Description of the statement type.

4. Click the Update button that is below the End Date field.

   On View Statement Type page, you cannot associate a solution type to a statement type, but you can disassociate the solution type from statement type.

5. Click Update.

Delete a Statement Type

The following procedures describe how to delete a statement type. You cannot delete the default statement type. You can only delete a statement type if no statement has ever used the statement type. You cannot undo this procedure.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

- Oracle Knowledge Management administrators with edit permission (CS_Type_Edit) can delete a statement type.

- Remove any solution types or external links that the statement type is using.

Steps

1. Navigate to Setup> Statement Types.

   The Statement Types page appears.

2. Click the numbered link of the statement type that you want to delete.

3. On the Statement Type page, verify that no related solutions types or external links are in the Related section.

4. To remove a solution type or an external link that a statement type uses:

   1. In the Remove column, select the check boxes that correspond to the related solution types or external links. You cannot remove a solution type if it is associated with existing solutions in the knowledge base.

   2. Click Update.

5. After removing the related solution types or external links, click Delete.

7

Managing Categories

This chapter covers the following topics:

- About Managing Categories
- Add or Create Categories
- Edit Categories
- Delete Categories

About Managing 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. Using the analogy of a library, you could:

- Characterize fiction as a category.
- Characterize mysteries and classics as subcategories.
- Compare book titles to solutions.

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.

Solution categories are the same as **categories**.

Category Usage with Solution-Level Security

Categories help control Security and access to solutions. You control access to categories through the **Visibility setting**. The Visibility settings of a categories, solutions, and statements are factors to determine whether or not a particular user can access the solution. The Visibility setting specifies the confidentiality of the solution.

When you define the categories, you choose from a list of visibilities for each category. You cannot specify that a child category--a subcategory--be more visible than its parent category. Oracle Knowledge Management filters the list of available visibilities that are available for a child category according to the Visibility of its parent.

You also organize categories into views or Category Security Groups. Category Security Groups define which categories a user can see by way of its association with user Responsibilities.

For more information about Security, Visibility, and Category Security Groups, see Managing Security, page 9- 1 .

Using Categories

Both knowledge administrators and users can use categories to effectively manage the knowledge base.

Managing Categories

Knowledge administrators define and manage the number of categories in the knowledge base to ensure that categories are meaningful. It is important that the knowledge administrator create enough categories for the segmentation to be useful, but not create so many categories that hierarchy becomes unmanageable.

Adding Categories to Solutions

Knowledge workers can add more than one category to a solution. Categories are a **mandatory** attribute for creating solutions. For example, a computer manufacturer might have a solution that addresses issues with both a printer and a laptop computer. If that company had both Computer and Printer categories, it would make sense to add both of the categories to the solution.

Browsing Categories

Knowledge Workers can navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base to find published solutions.

Filtering Search Results

Users can apply categories as filters when conducting an Advanced Solution Search to narrow search results.

Add or Create Categories

You can add or create categories from the Manage Solution Categories page.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup> Categories...Categories page

Steps

1. Select the category to which you want to add categories by selecting the corresponding option button.

2. Click the + button.

    The Create Category page appears.

3. Enter a Name.

4. Choose a Visibility from the list.

5. Click Apply.

On the Categories page, a Confirmation message indicates creation of the new category. The message also indicates the hierarchical path of the new category.

You can view the new category by navigating to the Knowledge Base Search page on the Knowledge tab.

Edit Categories

You can edit the names or visibilities of categories from the Categories page.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup> Categories...Categories page

Steps

1. Select the category that you want to edit and click the Update icon on the same row.

   On the Update Category page, the selected Category Name and Visibility appear as an editable field.

2. Edit the category name or choose another Visibility.

3. Click Apply.

Delete Categories

You can delete categories from the Manage Solution Categories page. You cannot delete categories that contain subcategories or solutions.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup> Categories...Categories page

Steps

1. Select the category that you want to delete and click the Delete icon on the same row.

A Warning message appears to ask you if are sure that you want to delete the category.

2. To delete the category, click Yes.

8

Managing Authoring Flows

This chapter covers the following topics:

- About Authoring Flows
- Create an Authoring Flow
- Enable or Disable an Authoring Flow
- View and Modify an Authoring Flow

About Authoring Flows

Oracle Knowledge Management integration with Oracle Workflow provides a workflow process to Oracle Knowledge Management internal users to manage the solution approval and rejection processes. It is a flexible method for Oracle Knowledge Management internal users to define solution processing steps that are specific to their needs.

A solution author has an option to either save the solution to his or her own work area or to submit the solution to an authoring flow for further processing in the solution detail page.

About Solution Authoring Flows

A solution authoring flow in Oracle Knowledge Management consists of a series of steps through which a solution goes before reaching a desired state. Each step in the authoring flow includes both an assigned resource group and an action to perform. The resource group can include one or more members. An Oracle Knowledge Management administrator can:

- Define and choose each step of an authoring flow.
- Assign a resource group to each step of an authoring flow.
- Choose an action at each step of the flow.

You can set up the subscription to specify the solutions for which you would like to receive e-mail notification. Whenever a solution that relates to the subscribed item (product) or categories is ready for reviewing, the system sends e-mail notification to you.

When a solution author submits a solution to an authoring flow:

- A copy of the solution remains outside the authoring flow so that others can view it immediately if solution has been previously published.
- A new copy of the solution is available for processing within the authoring flow.

Create an Authoring Flow

An Oracle Knowledge Management administrator can setup an authoring flow. For each authoring flow, you can define the following parameters: **Order**, **Step**, **Assigned To**, and **Action**.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Administrative permission to create a new authoring flow

Navigation

Knowledge > Setup > Authoring Flows...Authoring Flows page

Steps

1. Click Create.

   The Authoring Flow Set Up page appears.

2. Type a Flow Name.

3. For each row, specify:

   - **Order**: Defines the sequence of steps in an authoring flow. It is a numbered order that determines how the steps in a flow appear. For example, a step with an order number 1 appears before a step with the order number 5.

   - **Step**: Represents the various transitions within an authoring flow. For example, your choices of Steps might include: Deleted, Draft, Editorial Review, Public, Public Internal, Public Limited, Published, Technical Review, and Under Edit. You can modify these steps by modifying the CS_KB_STATUS lookup type.

   - **Assigned To**: Represents the resource group that has permission to lock and update and modify a solution in a specific step of an authoring flow. You can assign each step in an authoring flow to any of the available user groups that have required permission.

   - **Action**: Represents the action that the Oracle Knowledge Management system must take at each step of an authoring flow. Choices for an authoring flow can include:

     - **Notify**: Members of the resource group assigned to this step receive notification.

     - **Obsolete**: If you assign Obsolete to a step, when the solution reaches this step, it will have an Obsolete status. The solution remains in the system, but it is no longer visible to any user.

     - **Publish**: If you assign Publish to a step, when the solution reaches this step, it will have a Publish status. If the Visibility for the solution on the Solution Detail page had been **External**, then the solution is visible to external users. Members of the resource group who are assigned to this step receive notification.

4. Click Update.

> **Note:** Each flow must have at least one step of the action **Publish** or **Obsolete**. Also, the action for the last step must be either Publish or Obsolete.

Enable or Disable an Authoring Flow

An Oracle Knowledge Management administrator can enable or disable the authoring flows.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Administrative permission to create a new authoring flow

Navigation

Knowledge > Setup > Authoring Flows...Authoring Flows page

Steps

1. Identify the authoring flow that you want to enable or disable.

    Note: You can view additional authoring flows, if any, by clicking the Next or Previous link or by choosing from the list that is between the Previous and Next links.

    *   To enable a flow, select the Enable check box that corresponds to the authoring flow.

    *   To disable a flow, deselect the Enable check box that corresponds to the authoring flow.

2. Click Apply to save the changes.

    Note: You cannot disable a flow that has been set as a default flow profile option.

View and Modify an Authoring Flow

Authoring flows describe the steps through which a solution goes in the solution approval or rejection processes.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

Administrative permission to view (CS_Workflow_Setup_View) a workflow.

Navigation

Knowledge > Setup > Authoring Flows...Authoring Flows page

Steps

1. Click the Update More Details icon that corresponds to the authoring flow.

    The Authoring Flow Set Up page displays the authoring flow details. For each authoring flow, you can modify the Order, Step, Assigned To, and Action parameters.

2. To modify the Order, renumber the step numbers.

3. To modify a Step, choose a new value from the Step list for the corresponding step.

4. To modify the Assign To group, choose a new value from the Assigned To list for the corresponding step.

5. To modify an Action, choose a new value from the Action list for the corresponding step.

6. To add a new row of values, click the More Rows arrow and enter the Order, Step, Assigned To, and Actions values.

7. To delete a row, select the Remove check box.

8. To revert to or restore the most recently saved authoring flow, click the Restore button.

9. After you have finished editing, click the Update button.

    The modified authoring flow appears on the Authoring Flow Set Up page.

9

Managing Security

This chapter covers the following topics:

- About Security
- Set Up and Maintain Visibility Levels
- Set Up and Maintain Category Security Groups

About Security

> **Note:** The audience for this chapter is the administrator who organizes, sets up, and maintains the master category hierarchy and Solution Security.

Overview topics in this section include:

- Summary, page 9- 1
- Visibility, page 9- 2
- Category Security Groups, page 9- 4
- Solution Security Filtering Hierarchy, page 9- 4
- Statement Filtering and Category Security Groups, page 9- 4
- About Associating Solutions and Categories, page 9- 4
- Solution Security Relationships, page 9- 5
- About Changing Security Settings, page 9- 8

Summary

Solution Security provides a flexible way to control the user access of solutions. Solution Security identifies which solutions in the knowledge base that users can access. Solution Security uses the following main factors to determine whether or not a user can access a solution:

- **Category Security Groups**: Category Security Groups--also known as category views--provide users access to a group of solution categories. Users can access only the categories within their assigned categories and subcategories. For more information, see Category Security Groups., page 9- 4

- **Categories**: Categories are groups of solutions by subject area. Solution categories are comparable to a folder that contains solutions. Security control at the category

level, using Visibility, restricts access to all solutions and subcategories within the category. For more information, see Managing Categories, page 7- 1 .

- **Visibility**: Visibility is the relative sensitivity or confidentiality of a solution. You associate visibilities with users, categories, subcategories, solutions, and statements. All of these associations impact which solutions that a user can access.

  For more information, see About Visibility, page 9- 2 .

- **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.

About 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. For example, some solutions are more sensitive or confidential than others, and therefore you should allow only a specific group of users to access them. Some solutions are not so sensitive, such that you consider them to be general access solutions that customers--or possibly anyone--could have access to.

Visibility is a linear scale of designating the relative sensitivity or confidentiality of categories, solutions, and statements. You cannot create duplicate Visibility names.

High Restrictions, Limited Access

At one end of the linear scale, a Visibility Level is highly restrictive with limited access. A highly restrictive Visibility Level is for highly sensitive or highly confidential information.

Low Restrictions, Broad Access

At the other end of the linear scale, the Visibility Level has low restrictions with broad access. A Visibility Level with low restrictions is for broader, more public audiences, where the information has low sensitivity or low confidentiality.

Categories

You--the administrator--organize and create categories. When you create categories (and subcategories), you specify the Name and Visibility. When you define the categories you choose from a list of visibilities for each category. You cannot specify that a child

category--a subcategory--be more visible than its parent category. Oracle Knowledge Management filters the list of available visibilities that are available for a child category according to the visibility of its parent.

For more information, see Managing Categories, page 7- 1 .

Solutions

Solution authors specify the Visibility of their solutions when they create or update solutions.

For more information, see Create a Solution, page 4- 4 .

Statements

Authors of statements specify the Visibility of statements when they create or update them.

For more information, see Working with Statements, page 3-23 and Create a Solution, page 4- 4 .

Organization of Visibility Levels

Visibility Levels let you define how the visibilities fit together in a linear manner or scale, from low sensitivity to high sensitivity.

Visibility Levels for category and solution are extensible. As an administrator, you can insert new Visibility Levels anywhere along the scale. At the time of implementation, you should set up Visibility Levels and associate them to user access.

Visibility Levels for statements are not extensible. You cannot modify the seeded visibilities for statements.

Typically, high visibility categories, solutions, or statements have low sensitivity, and many people can view them. On the other hand, low visibility categories, solutions, or statements have high sensitivity, and relatively few people can view them. The highest visibility might be for external usage, and the lowest visibility might be for internal usage.

Before you assign Visibility Levels to categories, you must create the master category hierarchy. As you create the categories in the hierarchy, you assign the category Visibility Levels. When users create solutions and statements, they assign each solution and statement a Visibility Level.

For more information on creating categories, see Managing Categories, page 7- 1 .

Seeded Visibility Levels

Oracle Knowledge Management includes:

- Seeded Visibility Levels of **Internal** and **External**.

- End-dated Visibility Levels of **Limited** and **Restricted** to accommodate backward compatibility. However, new installations include only the seeded Internal and External Visibility Levels.

User Visibility Levels

As the administrator, you need to assign Visibility Levels for user access. When the user logs on, Oracle Knowledge Management allows the user to access all the solutions that are at the assigned Visibility Level up to the most visible level. You can define and configure user access levels at any time. Oracle Knowledge Management provides the seeded solution access levels of **Internal** and **External** for new installations.

If you are upgrading from an earlier version of Oracle Knowledge Management, you can add **Restricted** and **Limited** access levels to maintain backward compatibility. You would normally perform that setup during implementation.

Category Security Groups

In addition to Visibility assignments to categories, solutions, and statements, you associate Category Security Groups (category views) with categories and responsibilities. Category Security Groups are the means of partitioning the full set of solutions so one set of users can see only one set of categories, while another set of users can see another set of categories.

When a user logs on, Oracle Knowledge Management determines in real time the user's responsibility and therefore the category view.

The assignments of Visibility and Category Security Groups determine which categories that the user has access to, such as for searching or browsing, creating solutions, and drilling down to statement details.

Depending on a user's access, the categories within their Category Security Group (category view) appear. Even though a user has a particular category view, the user might not see all the categories if that user has a low sensitivity visibility assignment, but within that category, there are highly sensitive categories, for example. This means that two users who have access to the same category view can see different categories depending on the visibility of those categories and their user access.

Solution Security Filtering Hierarchy

Solution Security evaluates the Category Security Groups (category views) and the Visibility Levels of categories, solutions, and statements to determine what the user can have access to. Solution Security uses the following filtering sequence:

1. Category Security Groups are the first level of filtering. This occurs when a user logs on to or accesses Oracle Knowledge Management.

2. Category visibilities are the second level of filtering. A user can only access the categories within his access level. If there are solutions that are within the user's Visibility Level, but are in a category the user cannot access, the user cannot successfully search for, browse, or view those solutions. Within a category, the user has access only to the solutions and statements within his Visibility Level.

Statement Filtering and Category Security Groups

There is no direct connection between statements and category groups. Statement filtering is by statement Visibility and then indirectly through the solution to which the statement belongs, and then the category group to which the solution belongs.

About Associating Solutions and Categories

Because you can associate solutions with multiple categories, solutions can also belong to more than one Category Security Group.

Other solutions might re-use the statements from other published solutions. For maintenance purposes, only solutions that belong to the same Category Security Group can re-use the statements that are within the same Category Security Group.

When knowledge workers search for statements, the system filters their results by whether or not the statement belongs in the same Category Security Group and also the Visibility Level of the statement itself.

Solution Security Relationships

The following topics describe and show the relationships among various components of Solution Security:

Relationships Between Visibility Levels and Users, Categories, Solutions, and Statements

Visibility Levels are on a linear scale. At one end of the scale, the visibility is very restrictive--such as Internal. At the other end of the scale, the visibility is open or less restrictive--such as External.

Category, Solution, and Statement Visibility Levels

Categories, solutions, and statements all have a Visibility attribute. Whereas the Visibility Levels for solutions and categories are extensible, the Visibility Levels for statements are **not** extensible. The seeded Visibility Levels for statements are **Internal** and **External**. You cannot create or delete Visibility Levels for statements. The seeded Visibility Levels for categories and solutions are **Internal** and **External**. You can create or delete additional Visibility Levels for categories and solutions.

For more information, see also Set Up and Maintain Visibility Levels, page 9- 8 .

User Visibility Levels

You assign users Visibility Levels by way of two profile options: one for statements and one for categories and solutions. The assignment of Visibility Levels to a user means that the user can see any solution, category, or statement that has that Visibility Level or a less restrictive level.

The following diagram shows the relationships between Visibility and:

- Users
- Categories, Solutions, and Statements

Visibility with Users, Categories, Solutions, and Statements

USER ACCESS	VISIBILITIES	SOLUTIONS

For Categories and Solutions

For Categories and Solutions (extensible): **Internal** (higher restriction) **External** (lower restriction) plus any other Visibility levels that you create.

Category

Solution

For Statements

For Statements (not extensible): **Internal** (high restrictions) or **External** (lower restrictions)

Statement
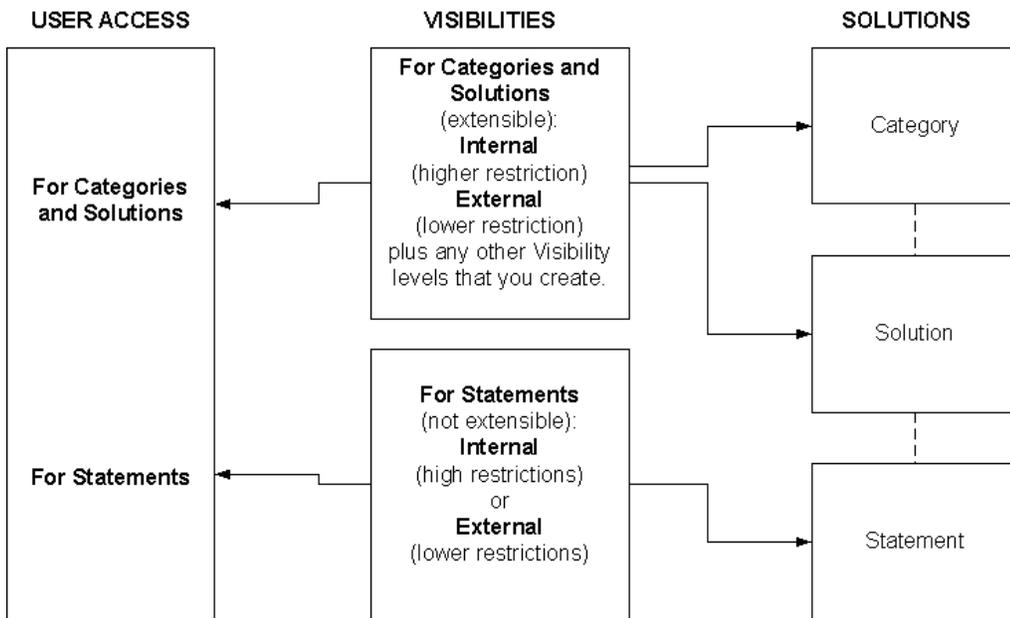
Relationships Between Categories, Visibility, and Category Security Groups

The following diagram shows the relationships between categories and **Category Security Groups** (category views):

- An association between Category Security Group **K** and Subcategories **a1**, and **a2**, but **not** category **A**. A user with Security Group **K** sees only subcategories **a1** and **a2**.

- An association between Category Security Group **M** and category **B**. A user with Category Security Group **M** access sees category **B** and all subordinate categories that branch from category **B**, such as subcategory **b1**.

    > **Note:** Oracle Knowledge Management always displays the highest node in the category hierarchy that you have selected. For example, if you first associate subcategory **b1** to Category Security Group **M**, and then you associate parent category **B** to Category Security Group **M**, then parent category B replaces subcategory b1 in the display of categories.

Categories and Category Security Groups
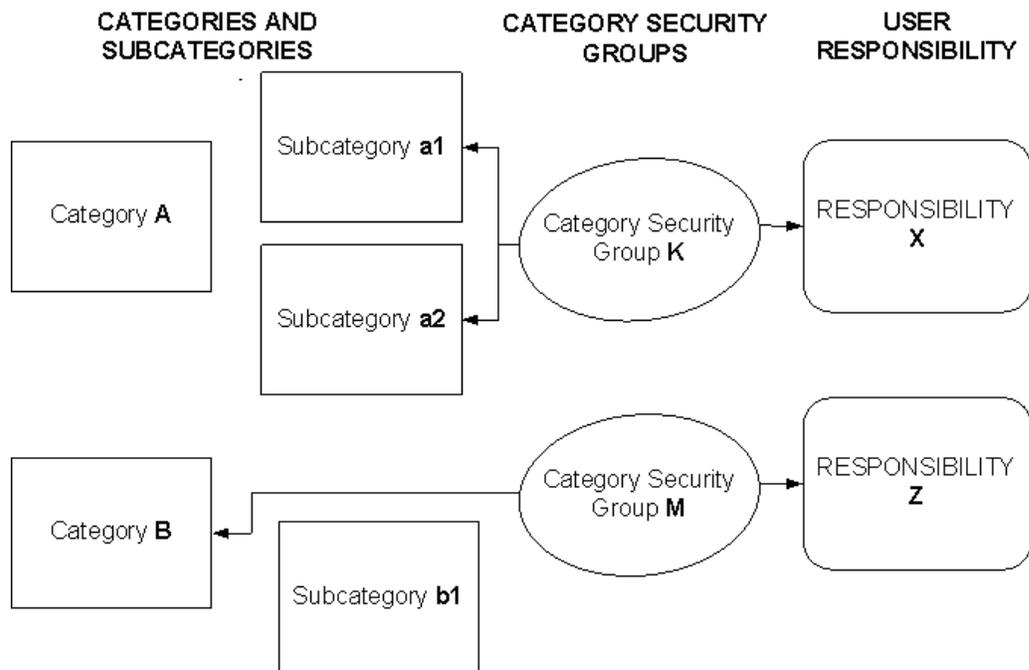
Relationships Between Responsibilities and Category Security Groups and User Access

The following diagram shows relationships between Responsibilities and:

- **Category Security Groups**: You can associate a Category Security Group to one or more Responsibilities. However, you can associate only one Category Security Group to a Responsibility. The following figure shows that both Responsibilities **X** and **Y** have an association with Category Security Group **K**, but each Responsibility has only one association with a Category Security Group.

- **User Access**: You can assign as many Responsibilities as you want to a user, but there is only one single active Responsibility at a time for a given user. When the user logs on, the user selects which Responsibility to activate among all the Responsibilities assigned to him or her. Through the profile option setup, you can assign one set of Visibility Level values per Responsibility. For example, if the user has two Responsibilities **X** and **Y**, it is possible to assign the user:

  - External statements and external solutions and categories for Responsibility **X**.

  - Internal statements and internal solutions and categories for Responsibility **Y**.

Responsibilities with Category Security Groups and User Access
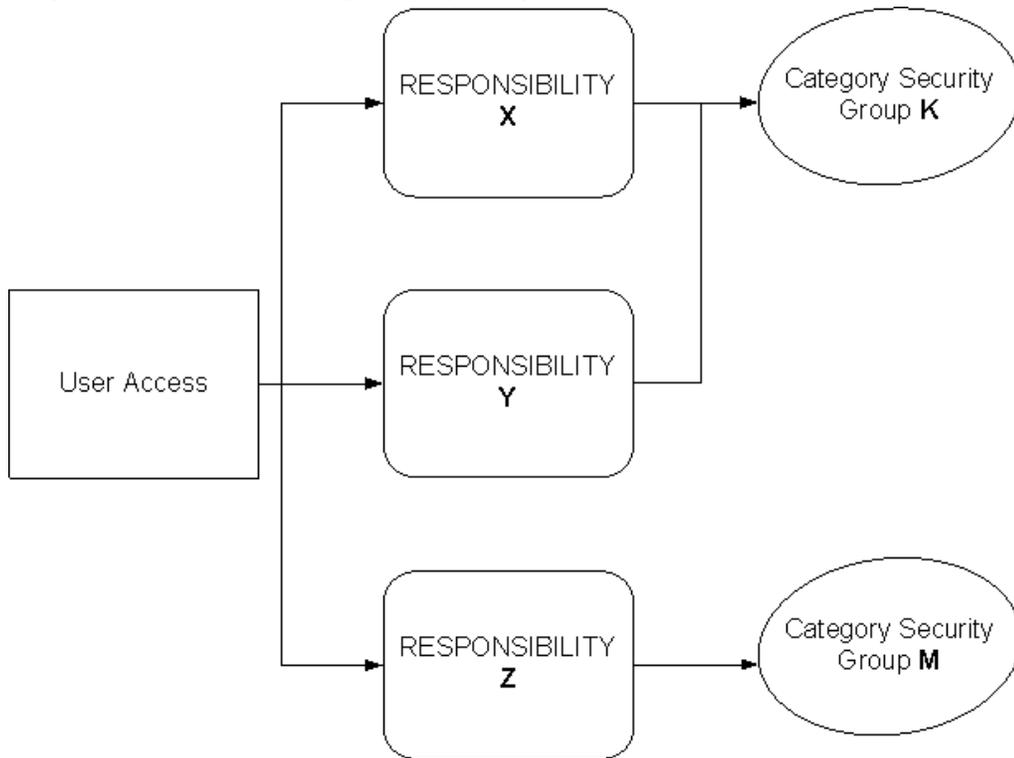
About Changing Security Settings

Changes to the Security settings--for example, adding or removing categories from Category Security Groups or adding a new Visibility Level--impact the index that Oracle Knowledge Management uses for searches. For example, if you assign a category that has a lot of subcategories and solutions to a Category Security Group, a user who belongs to that Category Security Group can access a lot of data. When these changes occur, the user cannot search for it immediately. Only after the background concurrent requests complete their tasks can the user search for the data.

Set Up and Maintain Visibility Levels

Topics in this section include:

- Create a Visibility Level, page 9- 8
- Update or Delete a Visibility, page 9- 9

Create a Visibility Level

When you can create a new Visibility Level, you must decide where it fits in the hierarchy of other Visibility Levels. You must plan your Visibility Levels in a linear manner in terms of sensitivity, from **low sensitivity with high** access to **high sensitivity with low or restricted access**.

In its simplest form, you might have only two Visibility Levels:

- **Internal**: For more sensitive material that should be available only internally to your company and your employees.

- **External**: For less sensitive material that is available to customers or the public.

When you create new Visibility Levels, you place the new Visibility Level above or below existing Visibility Levels.

You can also update or delete Visibility Levels. For more information, see Update or Delete a Visibility, page 9-9 .

You cannot create duplicate Visibility Level names.

After you create Visibility Levels, you assign Visibility Levels to users, categories, solutions, and statements.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Visibilities...Visibilities page

Steps

1. Determine where you want your new Visibility Level to appear on the list.

   The least sensitive or least confidential Visibility Level appears at the top of the list. The most sensitive or most confidential Visibility Level appears at the bottom of the list.

2. Select an existing Visibility Level check box and click either the:

   - Add Above button to let the new Visibility Level precede the selected Visibility Level.

   - Add Below button to let the new Visibility Level follow the selected Visibility Level.

     The Create Visibility Level page appears.

3. Enter Name (required) and Description (optional).

4. Click Apply.

   Your new Visibility Level appears either above or below the selected Visibility.

Update or Delete a Visibility

You can modify a Visibility to:

- Change or correct the name or description.

- Delete a Visibility.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Visibilities...Visibilities page

Steps

1. To change the name or description:
   1. Select the Visibility Level option button and click the Update icon. The Update Visibility Level page appears.
   2. Edit the Name or Description.
   3. Click the Apply button. The Visibilities page displays the changes.

2. To delete a Visibility:
   1. Select the Visibility Level option button and click the Delete button. A message asks you if you sure you want to delete the Visibility Level.
   2. Click Yes. The Visibilities page no longer displays the deleted Visibility Level.

Set Up and Maintain Category Security Groups

Topics in this section include:

- About Category Security Groups, page 9-10
- About Organizing Category Security Groups, page 9-11
- Create a Category Security Group, page 9-12
- Update a Category Security Group, page 9-12
- Delete a Category Security Group, page 9-13

About 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--the administrator--define the master category hierarchy, you must also define the views--the Category Security Groups--of the master category hierarchy.

You associate Category Security Groups with:

- **Categories and subcategories**: To indicate which categories and subcategories that a user can view. When you create Category Security Groups, you specify which categories to include.

  For more information, see Create a Category Security Group, page 9-12.

- **Responsibilities**: To indicate which users can see which categories. You can associate a Category Security Group to one or more Responsibilities, but you

can associate only one Category Security Group to a Responsibility. When you define Responsibilities, you associate a Category Security Groups with them. The Responsibility with which a user logs on to the module determines which Category Security Group to use for accessing the knowledge base.

About Category Setup

You set up a master category hierarchy at the time of implementation. The definition of categories and the master hierarchy need to be flexible enough to represent subject areas, products, structure of the company, and so on. Typically, you maintain and modify the master category hierarchy over time. You can add, edit and delete categories as required.

For more information, see Managing Categories, page 7- 1 .

About Organizing Category Security Groups

After creating the master category, you--the administrator--define Category Security Groups, which are **category views** that users have of the knowledge base. Category Security Groups are subsets of the master category hierarchy. Although the master category hierarchy includes a root Home category, you cannot include the root Home category in your Category Security Group. Instead, each Category Security Group has becomes its own **virtual Home**, which varies according to the selected categories.

The following figure shows a sample layout of a master category hierarchy with two Category Security Group views, **J** and **K**.

For example, Category Security Group **J** contains parent categories **A** and **b2**. Users whose Responsibility is associated with Category Security Group **J** can see only those categories and subcategories of **A** and **b2**, which includes **a1**, **a2**, **b2a**, and **b2b**. These same users cannot see categories **B**, **b1**, **b3**, or anything in category **C**.

Similarly, Category Security Group **K** contains categories **B** and **C**. Users whose Responsibility is associated with Category Security Group **K** can see only those categories and subcategories of **B** and **C**, but nothing in category **A**.

Category Security Group Views of the Master Category Hierarchy
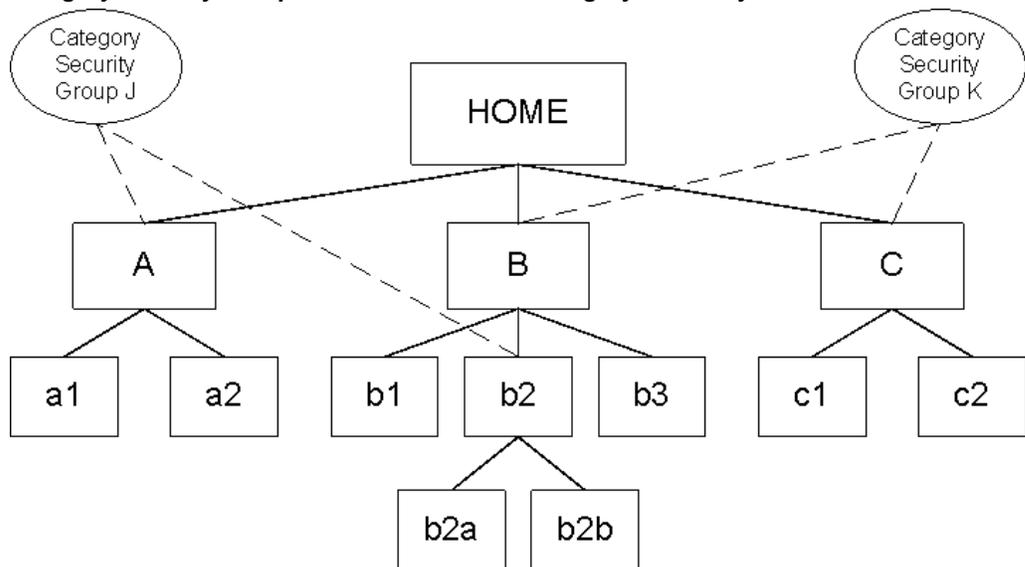
Create a Category Security Group

The following procedures describe to create a new Category Security Group. You can also update a Category Security Group, page 9-12 and delete a Category Security Group, page 9-13.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

You have set up categories. For more information, see Add Categories, page 7- 2 .

Navigation

Knowledge > Setup > Security...Create Category Security Group page

Steps

1. Enter Name (required) and Description (optional).

2. Click the Related Categories tab.

3. To associate categories with the Category Security Group, click the Include Category button.

   The Include: Categories page appears.

4. Expand the navigation tree, select the check box of each category or subcategory that you want to apply to the Category Security Group.

   You can select one or more categories and subcategories. If you want to specify **all** subcategories of a category, then select only the parent category. If you want to specify only specific subcategories but not the parent category or other subcategories, then expand the parent category and select only specific subcategories.

5. Click the Apply button.

   The Create Category Security Group page appears.

6. To add related authoring flows, click the Related Flows tab.

7. Click the Include Authoring Flows button.

   The Include: Authoring Flows page appears.

   For more information about authoring flows, see Managing Authoring Flows, page 8- 1 .

8. Select one or more authoring flows that you want to associate with the Category Security Group.

9. Click the Apply button.

Update a Category Security Group

After you have created a Category Security Group, you can update it to change the name, description, related category, or authoring flow.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup > Security...Create Category Security Group page

Steps

1. The Category Security Groups page displays a list of Category Security Groups.

2. On the row of the Category Security Group that you want to update, click the Update icon.

   The Update Category Security Group page appears.

3. To remove a category, click the Remove icon.

   The category disappears.

4. To add related categories, click the Include Category button.

   The Include: Categories page appears.

5. Expand the navigation tree, select the check box of each category or subcategory that you want to apply to the Category Security Group.

   For more information, see Steps **4** and **5** in Create a Category Security Group, page 9-12.

6. To update related authoring flows, click the Related Flows tab.

7. To remove an authoring flow, click the Remove icon on the row that lists the flow.

   The authoring flow disappears.

8. To add authoring flows, click the Include Authoring Flows button.

   The Include: Authoring Flows page appears.

   For more information about authoring flows, see Managing Authoring Flows, page 8- 1 .

9. Select one or more authoring flows that you want to associate with the Category Security Group.

10. Click the Apply button.

Delete a Category Security Group

You (the administrator) can remove a Category Security Group only if no authoring flows or categories are associated with the Category Security Group. Removing a Category Security Group does not affect the categories within the group. That is, removing a Category Security Group does not remove any categories. However, if you have associated any categories with the Category Security Group, you must disassociate them from the Category Security Group.

Also, when you remove a Category Security Group, the Responsibility that you had associated with the Category Security Group no longer applies to that Category Security Group. When anyone with that formerly associated Responsibility attempt to log on to Oracle Knowledge Management, an error message appears.

The following procedures describe how to:

- Disassociate categories from a Category Security Group.

- Delete a Category Security Group.

Login

Self-Service

Responsibility

Knowledge Administrator

Prerequisites

None

Navigation

Knowledge > Setup > Security...Create Category Security Group page

Steps

The Category Security Groups page displays a list of Category Security Groups.

1. On the row of the Category Security Group that you want to update, click the Update icon.

   The Update Category Security Group page appears.

2. On each row where a category appears, click the Remove icon.

   The category disappears. You must remove every category before you can delete the Category Security Group.

3. After you have removed all categories from the list, click the Apply button.

   The Category Security Groups page appears.

4. On the row that lists the flow that you want to delete, click the Delete icon.

   A confirmation messages asks you to if you are sure that you want to delete the Category Security Group.

5. Click the Yes button.

   > **Note:** If you had associated the deleted Category Security Group with a Responsibility, those users with that Responsibility will receive an error message when they try to log on. You should consider assigning another Category Security Group with that Responsibility.

Part 3

Customer Flows

This part contains the following chapter:

10

Managing Search--Customer Flow

This chapter covers the following topics:

- Using Basic Search--Customer
- Using Solution Advanced Search--Customer
- About Solution Details--Customer
- About Searching with Integrated Products--Customer Flows

Using Basic Search--Customer

This chapter includes procedural information about the search functionality for the **end-customer** who accesses Oracle Knowledge Management from other modules, such as iSupport. For more information, see the Overview topic for agents and administrators, page 3- 1 .

Another part of Oracle Knowledge Management covers **agent** and **administrator** search processes and procedures. For more information, see Managing Search for agents and administrators, page 3- 1 .

Basic Search lets you enter key words to perform a search for solutions across multiple repositories within the knowledge base. The default repositories in the customer-facing search are: Solution, Solution Categories, Forum, and Library. Because of its key word based interface, Basic Search is accessible to users of all levels of experience. The Basic Search matches the words that you enter across the header and body of the solution.

> **Note:** Other versions of Oracle Knowledge Management refer to the Basic Search as either the **Simple Search** or the **Unified Search**. Also, other versions of Oracle Knowledge Management refer to **Product** as **Item**. The customer-facing material in this section refer to **Basic Search** and **Product**.

The Basic Search keyword matching differs across repositories. It matches the header and body for Solutions, but only the header for Service Request.

The following diagram illustrates the process flow for a basic solution search by showing the steps from entering the search criteria to providing feedback on a solution.

Basic Solution Search Process Diagram
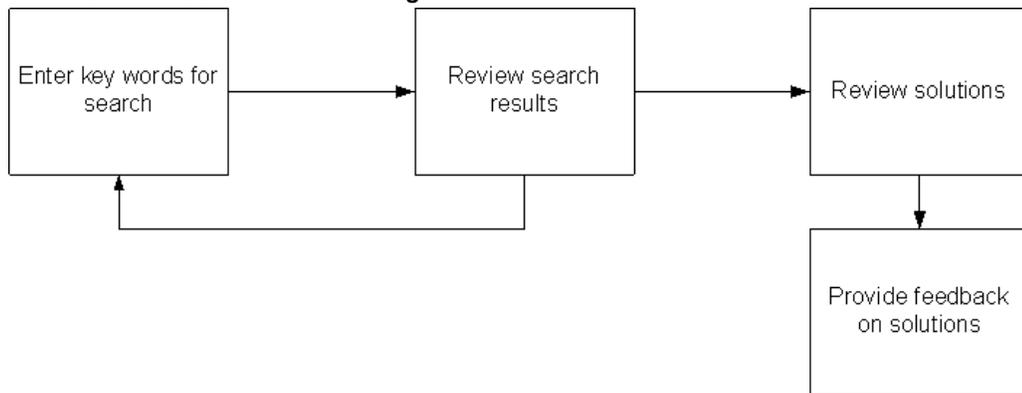
Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security, page 9- 1 .

Use this procedure to perform a Basic Search. Refer to your module's documentation for login, responsibility, and prerequisite information. The following procedures demonstrate access to Oracle Knowledge Management from the Oracle iSupport module.

> **Note:** The following procedures are for **customer-flows**, such as accessing Oracle Knowledge Management from another module. If you are accessing Oracle Knowledge Management using the agent-flows rather than the customer-flows, see Using Simple Search--Agent, page 3- 7 .

Login

jtflogin (for the integrated module)

Responsibility

(See other module documentation.)

Prerequisites

(See other module documentation.)

Navigation

Support tab > Ask Me tab...Knowledge Base page

Steps

1. In the Search field, choose a repository from the list.

    To perform a search across all available repositories, choose **All**.

2. In the Search field that is to the right of the Search list, enter text search criteria to narrow down your search.

    For example, to search for a solution regarding a printer type the word **printer**.

3. In the Using field, choose one:

    *   **Any of the words**: To match one or more words in any sequence.

    *   **All of the words**: To match all words in any sequence.

- Exact Phrase: To precisely match word-by-word in the same sequence.

  Note: Depending on your setup, the Using field might not be available.

4. In the Product field, click the Flashlight icon to search and select a product.

5. Click Go.

   Results appear in the Search Results section and appear by repository in tables. When searching all repositories, results appear in tables, such as:

   - Solutions, page 10- 3

   - Solution Categories, page 10- 3

   - Forums, page 3-10

Solutions

Search results for the Solutions repository include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Title**: Indicates the solution title. You can click the title to drill down to the solution details.

- **Solution Number**: Displays the matching solution number, which is a unique reference for the solution.

- **Updated Date**: Shows the most recent date on which an update occurred.

Click the corresponding solution title to display the Solution Detail page.

Category

Search results on for Categories repository include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Name**: Shows the category name and hierarchy.

Click the corresponding title to display solutions listed within the category.

Forums

Search results for the Forums repository include:

- **Score**: Shows how closely the results match the query key words entered. Oracle Knowledge Management uses various criteria to determine a score.

- **Title**: Indicates the forum title. Click a title to see its contents.

- **Updated Date:** Shows the most recent date on which the forum was updated

To display the Message Content page, click the corresponding Forum.

Browse Categories--Customer

You use Categories to organize solutions into logical groupings or subject areas. Using the analogy of a library, you could:

- Characterize fiction as a category

- Characterize mysteries and classics as subcategories

- Compare books to solutions

- Compare book titles to solution titles.

Oracle Knowledge Management lets you navigate through a hierarchy of categories, subcategories, and solutions within the knowledge base to find published solutions. When viewing solution details, the user can see the categories to which the solution belongs.

The following diagram illustrates the process flow for browsing solutions by showing the steps from reviewing categories to providing feedback on the solution.

Browse Categories Process Diagram

Use this procedure to browse categories.

Login

jtflogin (for the integrated module)

Responsibility

(See other module documentation.)

Prerequisites

(See other module documentation.)

Navigation

Support tab > Ask Me tab...Knowledge Base page

Steps

1. Choose a Category such as Appliances.

   The Solution Category page appears.

2. Choose a Category (a subcategory) or a Solution.

   Solutions appear in the Solutions section under the Solution Category section.

3. To filter solutions by when they were last used, choose a time frame value from the View list.

   Examples of your choices can include: this week, this month, the past 3 months, the past 6 months, this year, the past 2 years, and all.

   > **Note:** You can also perform a keyword search by entering a key word in the Search Solution field. By selecting the corresponding option button, you can specify whether the search should include All Solution Categories or Only in the Current Category.

Solution Results within a Category

The Solution results that are within a Category appear in a summary table and include:

- **Title**: Indicates the solution summary. Users can click on the title to drill down to the solution details.

- **Number**: Indicates the solution number. It is alphanumeric and is a unique reference for the solution.

- **Last Updated**: Shows the last date on which the solution was updated

Click the corresponding title to display the Solution Detail page.

Using Solution Advanced Search--Customer

Solution Advanced Search searches solutions in the knowledge base to let you find solutions using statements as criteria. In addition, you can specify attributes of the solution, such as keywords, Products, Platforms, Categories, and Statement Types as search criteria. Being able to specify statements as criteria means that you can use existing statements to find a solution.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access. For more information, see Managing Security, page 9- 1 .

Related Topics

Solution Advanced Search Criteria and Conditions, page 10- 5

Perform Solution Advanced Search, page 10- 6

Solution Advanced Search Criteria and Conditions

The following summaries provide an overview of the search criteria and conditions that you can use in an Solution Advanced Search.

Searching Method

The Searching Method appears only if the Knowledge: Display Search Option List option is set to Yes. The default value is No.

For more information, see Display Search Option List, page B- 1 .

Solution Type

Solution types help organize solutions within the knowledge base. A profile option determines the default solution type.

Choosing a solution type returns only statements of this type.

Filter Types

Adding a filter to the search criteria, limits the result set. When you create a solution, you can assign the solution to Categories, Product Types, or Platforms. You can use these groupings as filters during a Solution Advanced Search.

Examples of Filters include:

- **Solution Category**: Hardware

- **Product Type**: Envoy Laptop

- **Platform**: Linux

Typically, only computer technology companies use Platforms. Your administrator can hide the Platform attribute throughout the knowledge base by setting the Knowledge: Display Platform Attributes profile option to No.

Selecting a filter returns solutions that are associated to these Categories, Products, and Platforms. You can use multiple filters during a Solution Advanced Search.

Statements

Statements are the basis of the Solution Advanced Search. Types of statement searches include:

- **Matching Statements**: A text-based Matching Statements search searches the titles and descriptions of statements in the database to find similar statements.

- **Related Statements**: A Related Statement search finds other statements that have been used in a solution containing a selected statement. You can execute a Related Statement search only if you have selected at least one matching statement.

Search Options

You can choose from the following search options:

- Search Solutions

- Search Related Solutions

Search Solutions

Search Solutions is a text-based search that searches both solutions containing keywords in the Statement section and the solutions that relate to any statements that you have selected in the statement section.

Search Solutions finds all solutions that match the search criteria. By default, you use this search most of the time.

Search Related Solutions

This search is based on the links that the selected statements have to solutions. Any solution that has a relationship with any of the selected statements appear in the search results. Whenever the authors of solutions and statements use statements in a solution, they also create relationships between a statement and a solution.

The Score reflects the number of selected statements that each solution search result contains. Solutions having most of the selected statements have higher scores.

Search Related Solutions finds all solutions that contain the specified solutions.

Search Related Solutions appears only if the administrator has set Knowledge: Expose Search Related Solutions Button option to Yes. The default setting is No.

Related Topic

Perform Solution Advanced Search, page 10- 6

Perform Solution Advanced Search

The following procedures describe how to perform an Solution Advanced Search for customer-facing flows, such as accessing Oracle Knowledge Management from another module, such as Oracle iSupport. If you are an agent--such as a knowledge worker--who is accessing Oracle Knowledge Management from within Oracle Knowledge Management, see Using Advanced Solution Search--Agent, page 3-16.

Login

jtflogin (for the integrated module)

Responsibility

(See other module documentation.)

Prerequisites

(See other module documentation.)

Navigation

Support tab > Ask Me tab...Knowledge Base page

Steps

1. Click the Solution Advanced Search button.

    The Solution Advanced Search page appears.

2. Under Conditions, choose a Solution Type from the list.

    Your choices of Solution Type can vary, but typical examples can include: Symptom-Cause-Action, Problem-Solution-Results, Problem-Fix, and so on.

3. To add filters:

    1. In the Filters, area, choose a filter type from the list. Your choices can include: Solution Category, Platform, or Product.

    2. Click Add.

    3. If you chose Solution Category, the Select Solution Categories page appears.

        *   Navigate the Solution Categories tree by expanding or collapsing category branches, and select one or more corresponding check boxes.

        *   Click the Update button to add the selected filter or filters. The selected categories become search criteria.

    4. To add a Product filter, choose Product from the list.

        *   Click Add. The Select Product page appears.

        *   In the Name or Description fields, enter text criteria to narrow your search for Products, and click the Search button. Matching results appear.

        *   Select one or more corresponding check boxes to specify Products as search criteria.

        *   Click Update to add the Product filters. The selected Products become search criteria.

    5. To add a Platform filter, choose Platform from the list.

        *   Click Add. The Select Platform page appears.

        *   In the Name or Description fields, enter text criteria to narrow your search for Products, and click the Search button. Matching results appear.

        *   Select one or more corresponding check boxes to specify platforms as search criteria.

        *   Click Update to add the Platform filters. The platforms become search criteria.

4. To add a matching statement:

    1. In the Type column, choose a Statement type.

    2. In the Summary field, enter a keyword or statement.

    3. Click Match Statement. The Search and Select: Matching Statements page appears.

        • To specify a statement, select the option button that corresponds to the matching statement. You can select only one matching statements at a time.

        • Click Select. The statement becomes search criteria.

            > **Note:** You can also refine your statement search on this page by choosing a new statement type, entering a modified summary, and clicking Go.

5. To add a related statement.

    1. After adding a matching statement, click the Search Related Statements button. The Select Related Statements page appears.

    2. Select check boxes that correspond to the related statements.

    3. Click Select. The statements become search criteria.

6. Review your Filter and Statements and ensure that you have selected the check boxes for each item that you want to include.

7. Clear the check boxes of items that you want to exclude from search criteria.

8. Click the Search Solutions button.

    Results appear in the Results: Solution section on the Solution Advanced Search page.

9. Alternatively, click Search Related Solutions to search for solutions that contain the selected statements.

Solution Advanced Search Results

The Solution Advanced Search results appear in a summary table and include the following:

• **Score**: Shows how closely the results match the query

• **Summary**: Indicates a summary of the solution. An expanded list of statements that are included in the solution can be displayed by selecting the plus icon next to the solution summary.

    Search results can be added to the search criteria, by selecting the corresponding Select box and clicking Add to Search Criteria.

• **Usage**: Indicates how many times the solution has been viewed.

• **Last Updated**: Shows the last date on which the solution or statement was updated

• **View**: Allows you to view the Solution Detail page

    > **Note:** You cannot sort the Usage or View columns.

About Solution Details--Customer

Whenever you view a knowledge solution within Knowledge Management or from another module--for example, Oracle TeleService, Oracle iSupport, or Oracle Depot Repair--the information appears on the Solution Detail page.

The Solution Detail page identifies important information about the solution including what the solution is about (statements), the type of solution, and its authoring history. Information also shows how the solution applies to specific Products, Categories, and Platforms, as well as details that show the external links--such as Service Requests, Repair Orders, and so on--and attachments.

Also, Task Group Templates may have been activated with a solution. Solution detail can include these tasks which are a description of how to perform action on a solution. An example of a task is **schedule a field service representative**.

Information that identifies the solution and its history appear in the header. The header includes:

- **Type**: Indicates the solution type.

- **Last Updated**: Indicates when the solution was most recently updated.

The elements that comprise the solution include:

- **Categories**

- **Products**

- **Platforms**

- **Statements**

> **Note:** Statements are the most critical information in the solution.

- **Attachments**

- **Related Documents**

- **Comments**

For more information about these elements, see Create a Solution, page 4- 4 .

You can submit comments to the solution. In addition, you can indicate whether a solution **solves your problem**. The system captures responses in **usage counts** within Knowledge Management.

With the correct Responsibility, you can add comments on the View Solution Detail page if you have the permission **CS_Solution_View_Internal**.

Comments accumulate through different versions of a solution until publishing of the solution. After solution publishing, you can no longer view the previous comments, but you can add new comments.

Security, Visibility, and Category Security Group settings impact which solutions, categories, and statements you can access.

For more information, see Managing Security, page 9- 1 .

About Searching with Integrated Products--Customer Flows

Several modules within the Oracle E-Business Suite integrate with Oracle Knowledge Management, allowing users to search the knowledge base from other modules. Table 10–1 lists Oracle E-Business Suite modules that integrate with Oracle Knowledge Management searches by way of customer flows.

For information on Oracle E-Business Suite modules that integrate with Oracle Knowledge Management by way of **agent flows**, see About Searching from Integrated Modules--Agent Flows, page 3-29.

Search Integrations from Customer Flows

E-Business Suite Product	Search Integrations
Oracle iSupport	iSupport users can access Knowledge Management pages from the Support tab in iSupport.
	For information on using iSupport see the latest version of the *Oracle iSupport User Guide*.
Oracle Partners Online	Partners Online users access iSupport pages.
	For information on using Partners Online or iSupport see the latest versions of the *Oracle Partners Online User Guide* and the *Oracle iSupport User Guide*.

A
Frequently Asked Questions

This appendix covers the following topics:

- Frequently Asked Questions

Frequently Asked Questions

What is Oracle Knowledge Management?

Knowledge management is the process by which knowledge is identified, accessed, enhanced, and protected through the use of advanced technology, user friendly portals, and the development of a culture of openness, sharing, and collaboration.

Knowledge becomes an asset for an organization only when it is available in an ordered and accessible format for use by its employees and customers. Knowledge can exist in different structured formats such as databases, white papers, presentations, and so forth.

Oracle Knowledge Management prevents duplication of effort and poor decision making due lack of quality information. Oracle Knowledge Management improves communication, reduce costs, and to develop competitive advantage.

More than eighty percent of incoming customer assistance requests to service centers involve issues that have already been resolved. If a knowledge management system is not available, a frequently-posed question must be repeatedly researched and relayed by the agent. In this scenario, several costs, both real and in terms of customer satisfaction, are incurred. Real costs are associated with the life cycle of the problem: customer service representatives must answer the initial customer call, log the problem, request more information, escalate the problem, deal with bugs, find out if a solution already exists, communicate the fix back to the customer, and close the problem. Intangible costs are associated with low customer and agent satisfaction.

A good knowledge management system helps build strong customer relationships by enhancing the customer experience with a company's product or service. The Oracle Knowledge Management module is an important part of any complete customer support module. It allows customer support representatives to match the problem that they face with the problems that have been previously experienced and recorded. Reuse of existing problem descriptions and solutions, improves customer service efficiency.

What is the business need of Oracle Knowledge Management?

Customer expectations are driving customer service innovations. To meet the round-the-clock demands of the Internet, e-commerce sites must provide additional personnel to handle customer support needs. Unless you can afford a 24/7 staffed call

center, you must make preparations for middle of the night shoppers and Internet users in global time zones.

Knowledge bases are an excellent way to provide information to customers on a self-serve basis, particularly for complex services, such as technical support. If your visitors ask about installing a new sound card, upgrading the BIOS, installing a modem, or cleaning up after a virus, then you most likely need more than an FAQ.

What is Oracle Knowledge Management?

Oracle Knowledge Management is a solution management and document access system that allows customers to search for and resolve their own issues. It has a tight integration with other Oracle Applications modules.

Oracle Knowledge Management also provides solution capture and immediate access to new solutions. The relational aspect of knowledge management provides focused results that relate more directly to the issues being researched.

Using natural language queries, customers are able to find immediate and accurate solutions to problems and answers to questions, thereby attaining satisfaction quickly and increasing your return on investment. Self service support can present a viable 24/7 alternative to heavily staffed call centers at a fraction of the cost.

Oracle Knowledge Management currently provides solution management to Oracle *i*Support, Oracle Support, Oracle Field Service, Oracle Depot Repair, and Oracle eMail Center. The architecture has been designed to support diverse use and is expected to be utilized by other products.

What is it aimed to do?

Oracle Knowledge Management aims to:

- Reduce support operation costs.
- Retain profitable customers.
- Address diverse customer needs by providing the information to meet those needs.
- Empower customers to help themselves through Web self-service 24 x 7.
- Increase customer satisfaction.
- Increase support agent satisfaction and retention.

Why is this important?

The phone has been the traditional method for an organization for delivering service to its customers. A clear global trend is increasing customer usage of the Web to receive answers to their questions immediately. Internet enabled self service has become the most important trend in customer service because customers can get service wherever and whenever they want without waiting in phone queues.

Are there any techniques to help in searching the knowledge base effectively?

You can use the Advanced Solution Search functionality, or the category headings on the Simple Search page to reduce the number of solutions for your query. A search performed by entering a word or a phrase in the Simple Search page searches the entire knowledge base.

What search method should I use, if I do not know the Solution Number?

If a Solution Number is not known, then you can use the keyword search. This search is not case sensitive. More keywords result in a narrower search. Enter appropriate keywords for quicker and more specific results.

After checking out and locking a solution, how can I check it in, without having to submit it to a work flow?

There is currently no way to check in a solution. You must submit a solution back to a workflow.

How do I publish a statement?

A newly created statement is by default in the draft status. It is published when the solution that it is associated with is published.

What is the Oracle Trading Community?

Trading Community and Trading Community Architecture (TCA) is an architecture designed to support trading communities. The goal of TCA is to provide the foundation for Oracle Applications modules. To do this, TCA strives to model all relationships within a **trading community**. This enables one data model to store B2B, B2B2C, B2C and B2C2C data. For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers and business consumers. The appliance manufacturer not only wishes to track relationships between itself and other entities within the trading community. The manufacturer may also be interested in relationships that other community members have with each other. The appliance manufacturer may not even have direct relationships with all the members of its trading community. But, it is important that the appliance manufacturer knows about these entities and how they relate to other entities within the community. Important to point out is that there is only one customer data model or schema, used in all Oracle Applications modules. The 11*i* Customer Model is not a product that can be purchased, Rather, it is the underlying data model that stores customer information and is included with any Oracle Applications module. All CRM modules utilize the Customer Model to store customer information, although the degree to which the Customer Model is utilized differs from module to module.

Does Oracle Knowledge Management support different languages?

Yes. Oracle Knowledge Management is MLS (Multi Lingual Support) compliant and supports multiple languages. Users can set the preferences to a language that they prefer to display, and this can be changed at any time. For example, customers at one particular site can change to a combination of English and Spanish at the same site.

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 also 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. You need to make sure that the solution is ready for all the installed languages before you assign the publish status to the solution.

How do I customize Oracle Knowledge Management?

Oracle JDeveloper can be used for Oracle Knowledge Management custom development. It can be used to write, debug, deploy, and test Java and JSP modules. You can customize menu, roles, permission, responsibilities and AK prompts. You can also customize lookups and profile options.

Are there options available in the Rapid Installer for Oracle Knowledge Management?

No.

Where are the documents in Oracle Knowledge Management stored?

Solutions in Oracle Knowledge Management are stored on the main instance where Oracle Knowledge Management is installed.

How are attachments to solutions in Oracle Knowledge Management stored?

Attachments are stored on the database.

Why can't I find the solution that I created when I search for them using Advanced Solution Search or Simple Search pages?

To see the new solutions, you must first run the Knowledge Base Sync index concurrent program to refresh the data in the knowledge base.

You also must verify the Visibility Level. To view restricted solutions, you need to have the role with View_Solution_Restricted permission.

While doing a knowledge base Search, why can I not find statements that I used in creating a solution?

The solution that you have created is in a draft status.

- You cannot search draft solutions and statements in Simple Search or Advanced Solution Search.

- You can only find in-progress solutions in the Solutions in Progress pages, including the search for solutions in progress.

Publish your solution and run the sync index program again to search both published solutions and statements from Simple Search or Advanced Solution Search or Statement Search pages.

B

Display Search Option List

This appendix covers the following topics:

- Searching Methods

Searching Methods

The Searching Method appears in the Knowledge: Advanced Solution Search page only if the Knowledge: Display Search Option List option is set to Yes. The default value is No.

The Knowledge: Default Searching Method profile option determines the default search option used in both Advanced Solution Search and Simple Search (also known as Unified Search). Accumulate is the default searching value.

The following text search options are in Advanced Solution Search if the option is set to Yes:

- **All Keywords**: This search uses the AND operator. The search results must match all terms in the query. For example, if you enter *Oracle server* as a search query, Oracle Knowledge Management would read it as *Oracle* AND *server* and send it to Oracle Text.

- **Any Keywords**: This search uses the OR operator. This search can match one or more query terms.

- **Reference Number**: Every solution in Oracle Knowledge Management is assigned a unique number. This search finds the solution that is associated with the number entered in the search query field.

  The Reference Number option should not be set as the default search method.

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