Salesforce Knowledge Implementation Guide

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@salesforcedocs

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INTRODUCTION TO SALESFORCE KNOWLEDGE

Streamline and enhance your customer service processes with Salesforce Knowledge. The knowledge base lets you create and manage custom articles that can be easily shared with your Salesforce Knowledge users, customers, partners, and website visitors.

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

Using this Guide

Use this guide to perform setup tasks in the following sequence:

1. Familiarize yourself with Salesforce Knowledge features and terminology.
2. Prepare your implementation by answering the planning questions.
3. Create one or more article types.
4. Enable Salesforce Knowledge.
5. Create Salesforce Knowledge users.
6. Set up data categories for classifying articles.
7. Restrict article access by mapping data categories to roles.
8. Optionally, enable multiple languages for Salesforce Knowledge.
9. Optionally, allow case users to find, create, and send articles.
10. Optionally, enable Salesforce Knowledge in the Customer Portal.
11. Optionally, enable Salesforce Knowledge in the partner portal.
12. Optionally, import existing content into Salesforce Knowledge.

What is Salesforce Knowledge?

Salesforce Knowledge provides the following features and tasks to help you efficiently manage your knowledge base and its users:

Using Article Types

Article types are custom containers for your articles. Every article belongs to a type that determines its content and structure. Administrators define article types by creating custom fields to capture article data, grouping or reorganizing the fields as needed on the layout, and choosing an article-type template. The article-type template determines how the layout appears to viewers of the published article, and administrators can choose unique templates for different audiences and article types. Salesforce provides two standard article-type templates, Tab and Table of Contents, and you can use Visualforce to create custom templates.

Categorizing Articles

Data categories classify articles in Salesforce Knowledge. This classification helps users find articles and allows administrators to control article visibility. After data categories have been set up, article managers can assign the relevant categories to draft articles. When end users are searching for published articles in any channel—Internal App, Customer, Partner, or Public Knowledge Base—they can use the categories to help locate information. If your organization uses a role hierarchy, access to data categories is determined by the user's role.

Managing Articles

On the Article Management tab, article managers can create new articles as well as find and manage existing articles in any phase of the knowledge life cycle:

1. Create and save a new article.
2. Reassign the article to an editor, translator, reviewer, or any other collaborator as needed. That person can reassign the article as many times as necessary until the content is ready for publication. If an approval process is set up for the article type, you or the person you reassign to submits the article for approval. The article is routed to the appropriate approver or set of approvers, who either approve or reject it.
3. Publish the completed draft to one or more channels, depending on the audiences you've configured: the Articles tab in your Salesforce organization, a customer portal, a partner portal, or a public knowledge base. You can schedule the article to be published on a future date.
4. Update the article as needed. When modifying a published article, you can either remove it from publication so that the original is no longer visible to users, or leave the original published and work on a copy until you're ready to replace the original with your update.
5. Archive the article when it is obsolete to remove it from publication. As with publishing an article, you can archive immediately or on a future date.
6. Delete the article as needed, or turn it into a draft and begin a new publishing cycle.

Creating Articles

Authors create articles by selecting an article type, writing content, assigning categories, and choosing one or more channels. Depending on the article type, several fields may be available for different types of data.

Supporting Multiple Languages

With multiple languages for Salesforce Knowledge you can lower support costs by translating articles into the languages your audience prefers. After an administrator selects your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to a Salesforce Knowledge user for Spanish translations.

Using Articles to Solve Cases

Salesforce Knowledge and cases combine to provide a powerful customer support tool. To search the knowledge base directly from a case and attach related articles to the case for convenient reference, add the Articles related list to case page layouts. When closing a case, support agents can easily create a new article to capture important information and help solve future cases more quickly.

Searching for Articles

Finding articles in Salesforce Knowledge is quick and easy. Enter a search term on the Articles tab to initiate a full-text search of the knowledge base and narrow your search by selecting specific article types and categories. When the beta version of search spell correction is enabled, the system searches and retrieves alternate spellings for English search terms. You can filter search results by language, validation status, and category and sort the list view according to several criteria such as highest-rated or most-viewed. On the Article Management tab you can search for a specific article within the chosen list view. The Article Search component allows you to search for articles from the Home tab.

Rating Articles

Internal app, Customer Portal, and partner portal users can rate articles on a scale of 1 to 5 stars and view the average rating for an article. Average ratings are not static. Every 15 days, if an article has not received a new vote, its average moves up or down according to a half-life calculation. This change ensures that over time, older or outdated articles don't maintain artificially high or low ratings compared to newer, more frequently used articles. Articles without recent votes trend towards an average rating of 3 stars. The Articles tab also allows users to compare the ratings for different articles and sort the list view according to highest or lowest rated articles.

Note: Articles with no votes have the same average rating as articles with 3 stars.

Useful Terminology

The following terms are used when describing Salesforce Knowledge features and functionality.

Archived Article

Archived articles were published but later removed from public visibility. Article managers can view and manage archived articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Archived Articles**. Archived articles are not visible in the Articles tab (in any channel) or the public knowledge base. Articles can be archived manually or automatically via an expiration date.

Article

Articles capture information about your company's products and services that you want to make available in your knowledge base.

Article Manager

Salesforce uses the term *article manager* to represent a specific type of user. Article managers can access the Article Management tab to create, edit, assign, publish, archive, and delete articles. Article managers are sometimes referred to as knowledge managers. Article managers require the "Manage Articles" user permission. The Article Management tab is not visible to users without "Manage Articles."

Article Type

All articles in Salesforce Knowledge are assigned to an *article type*. An article's type determines the type of content it contains, its appearance, and which users can access it. For example, a simple FAQ article type might have two custom fields, `Question` and `Answer`, where article managers enter data when creating or updating FAQ articles. A more complex article type may require dozens of fields organized into several sections. Using layouts and templates, administrators can structure the article type in the most effective way for its particular content. User access to article types is controlled by permissions. For each article type, an administrator can grant "Create," "Read," "Edit," or "Delete" permissions to users. For example, the article manager might want to allow internal users to read, create, and edit FAQ article types, but let partner users only read FAQs.

Article-Type Layout

An *article-type layout* enables administrators to create sections that organize the fields on an article, as well as choose which fields users can view and edit. One layout is available per article type. Administrators modify the layout from the article-type detail page.

Article-Type Template

An *article-type template* specifies how the sections in the article-type layout are rendered. An article type can have a different template for each of its four channels. For example, if the Customer Portal channel on the FAQ article-type is assigned to the Tab template, the sections in the FAQ's layout appear as tabs when customers view an FAQ article. For the Table of Contents template, the sections defined in the layout appear on a single page (with hyperlinks) when the article is viewed. Salesforce provides two standard article-type templates, Tab and Table of Contents. Custom templates can be created with Visualforce.

Category Group for Articles

In Salesforce Knowledge, a *category group* organizes data categories into a logical hierarchy. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. When creating articles, authors assign the relevant categories to the article. End users searching for articles can search and filter by category.

Channel

A channel refers to the medium by which an article is available. Salesforce Knowledge offers four channels where you can make articles available.

- Internal App: Salesforce users can access articles in the Articles tab depending on their role visibility.

- Customer: Customers can access articles if the Articles tab is available in a community or Customer Portal. Customer users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Customer Community or Customer Community Plus licenses.
- Partner: Partners can access articles if the Articles tab is available in a community or partner portal. Partner users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Partner Community licenses.
- Public Knowledge Base: Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange. Creating a public knowledge base requires Sites and Visualforce.
- Your own website. Articles can be made available to users through your company website.

Data Category for Articles

In Salesforce Knowledge, *data categories* are a set of criteria organized hierarchically into category groups. Articles in the knowledge base can be classified according to multiple categories that make it easy for users to find the articles they need. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. Authors assign categories to articles. Administrators can use data categories to control access to articles.

Draft Article

Draft articles are in-progress articles that have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Draft Articles**. You can filter draft articles by those assigned to you or those assign to anyone (all draft articles for your organization). Draft articles can be assigned to any user involved in the editorial work.

Draft Translation

Draft translations are in-progress translations of articles into multiple languages. They have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft translations on the Articles Management tab by clicking the **Translations** tab in the View area and choosing **Draft Translations**. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization). Translations can be assigned to any user who can publish Salesforce Knowledge articles.

Knowledge Agent

Salesforce uses the term *knowledge agent* to represent a specific type of user. Knowledge agents are article consumers in the internal Salesforce Knowledge app. These users can access the Articles tab to search for and view articles, but they cannot create, edit, or manage articles.

Published Article

Published articles are available on the Articles tab in the internal app and, if applicable, in the Customer Portal, partner portal, and public knowledge base. To remove a published article, you can archive it or change its status to “draft” on the Article Management tab. To access published articles on the Articles Management tab, click the **Articles** tab in the View area and choose **Published Articles**.

Published Translation

Published translations are articles translated into multiple languages that are available on the Articles tab in the internal app and, if applicable, in the Customer Portal, partner portal, and public knowledge base. To remove a published translation, you can archive it or change its status to “draft” on the Article Management tab. To access published translations on the Articles Management tab, click the **Translations** tab in the View area and choose **Published Translations**.

Salesforce Knowledge Implementation Tips

Consider the following information when planning and implementing Salesforce Knowledge for your organization.

- For detailed implementation instructions, see "Setting Up Salesforce Knowledge" in the Salesforce Help.
- If you want to make articles visible on your website, install the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange.
- Public knowledge base users cannot rate articles.
- The File custom field type allows users to attach documents to articles. Note the following caveats about File fields:
  - The maximum attachment size is 25 MB.
  - You can add up to 5 File fields to each article type; contact Salesforce to increase these limits.
  - If the `Disallow HTML documents and attachments` security setting is enabled, File fields do not support HTML files.
  - Text content in a File field attachment is searchable. You can search up to 25 MB of attached files on an article. For example, if an article has six 5 MB file attachments, the first 4.16 MB of each file is searchable.
  - You cannot attach Salesforce CRM Content files using the File field.
  - The File field type is not supported in Developer edition.
  - The filename cannot exceed 40 characters.
  - You cannot convert a File field type into any other data type.
- You will lose your data if you convert a custom field on an article type into any other field type. Do not convert custom fields unless no data exists for the field.
- When renaming Salesforce Knowledge labels note that standard field names, like title and type, are fixed. These fields do not change the labels on the article create and edit pages. If the organization is set to another language, these fields remain in the fixed label for that language.
- The Salesforce Knowledge search engine supports lemmatization, which is the process of reducing a word to its root form. With lemmatization, a search can match expanded forms of a search term. For example, a search for *`running`* matches items that contain *run*, *running*, and *ran*. Lemmatization is available only for articles that are marked as being in one of these languages: Danish, Dutch, English, French, German, Hebrew, Italian, Korean, Norwegian, Portuguese, Romanian, Russian, Spanish, or Swedish. Additionally, the search must be initiated by a user who is viewing the application in one of these languages. You can edit the default language for your organization on the Company Information page.
- Make sure that you have a clear understanding of the type of articles your organization will implement, and how users will need to interact with these article types. This will determine the article type permissions and article actions that you need to assign to Salesforce Knowledge users, which you can then use to create the set of profiles or permission sets required by your organization. For more information, see "Granting Permissions for Salesforce Knowledge Users" in the Salesforce Help.
- Determine if you need to create workflow rules for some of your article types. For example, you can create a rule that sends an email to an article manager when an agent creates a new article upon closing a case.
- Determine if you need to create approval processes for some of your article types. For example, if you have a type of article that must have legal and management approval before it can be published externally, you should create an approval process for the article type.

Consider the following tips if your organization plans to use data categories.

- You can create up to three category groups with a maximum of five hierarchy levels in each group. Each category group can contain a total of 100 categories.
- If you want to use data categories with Answers, after creating your category group you must assign it from Setup by entering *`Data Category Assignments`* in the `Quick Find` box, then selecting **Data Category Assignments** under Answers. You can only assign one category group to an answers community. Salesforce Knowledge supports multiple category groups.
- Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. Salesforce Knowledge supports a hierarchy of data categories.

- Category groups are hidden from users until they are activated. Do not activate a category group until you have finished defining its categories and their access settings, including their visibility.
- When assigning categories to articles, you can choose up to eight categories in a category group.
- If an article has no categories, it displays only when you choose the `No Filter` option in the category drop-down menu.
- When searching for articles or article translations, selecting a category automatically includes the parent and children of that category and any grandparents, up to and including the top level. Sibling categories are not included. For example, if a category hierarchy has the levels All Products, Switches, Optical Networks, and Metro Core, selecting "Optical Networks" from the category drop-down menu returns articles assigned to any of the four categories. However, if the Switches category has a sibling category called Routers, selecting "Optical Networks" does not return articles classified within Routers. Category visibility settings may limit the specific articles you can find.
- Once visibility settings have been chosen for the categories:
  - Users who are not assigned visibility can only see uncategorized articles and questions unless default category visibility has been set up.
  - For role-based visibility, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers by default. You can change the category group visibility settings for each portal role.
  - If you only have access to one category in a category group, the category drop-down menu for that category group does not display on the Articles tab.
- Deleting a category:
  - Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
  - Permanently deletes its child categories.
  - As applicable, removes the category and its children from the Answers tab, the Article Management tab, the Articles tab in all channels, and your company's public knowledge base.
  - Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
  - Removes its mapping to visibility. Users lose their visibility to articles and answers associated with the deleted category.
- Deleting a category group:
  - Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15–day holding period, you can either restore a category group, or permanently erase it immediately.
  - Deletes all categories within that group.
  - Removes all associations between the group's categories and articles or questions.
  - Removes all associations between the group's categories and visibility.
  - As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.
- You can translate the labels of categories and category groups using the Translation Workbench.

Salesforce Knowledge Best Practices

Consider the following tips when planning and using Salesforce Knowledge:

- Take full advantage of multiple article types as custom containers for your articles. Organizing articles by type helps differentiate content and allows users greater flexibility when searching for articles.
- Create synonym groups in Salesforce Knowledge. Synonyms are words or phrases that are treated as equivalent in article searches, letting you optimize search results. For more information see "Creating Search Synonyms" in the Salesforce Help.

- Before setting up data categories, carefully plan your category groups and their hierarchies. Also, consider how your category hierarchy will map to your role hierarchy. For more information, see "About Category Group Visibility" in the Salesforce Help.
- Create custom reports on your Salesforce Knowledge data. You can also install the *Knowledge Base Dashboards and Reports* app from the AppExchange to receive over two dozen helpful reports.
- Multiple users can edit the same article at the same time. If that occurs, your changes may be overwritten by a colleague without warning, even if you save your work frequently. To avoid accidental data loss, instruct all users who edit articles to only edit the articles they're assigned.
- Know the maximum limits for articles, article types, and data categories.
- Review your usage regularly to avoid storage shortages: from Setup, enter `Storage Usage` in the `Quick Find` box, then select **Storage Usage**.

PLANNING YOUR IMPLEMENTATION

Before you can begin setting up Salesforce Knowledge, it is important that you consider the following questions. The answers to these questions are necessary prerequisites to completing the tasks in this guide.

How many article types do you need?

Article types are custom containers for your articles; each article type can provide a different look-and-feel for the published article as well different types of information Sample article types include FAQs, Offers, and How-To's. Depending on your needs, you may want to create anywhere from two or three to a dozen or more article types. For instructions, see Creating Article Types on page 12.

Which fields do you want on each article type?

You can prompt authors to enter specific information by creating custom fields. For example, on a simple FAQ article type you might create text fields named `Question` and `Answer`. On an Offer you might include a picklist named `Contract Type` or a checkbox named `Warranty Available`.

Review the types of custom fields available and decide which fields and labels (names) you want to create for each article type. For instructions, see Creating Custom Fields on page 13.

How do you want the published article to appear?

Two factors determine how a published article appears to the end user: the layout and the template. On the article-type layout you can rearrange the custom fields you created and group them into sections. With the article-type template you decide how the sections should display. There are two standard templates: Tab and Table of Contents. The Tab template renders each section as a different tab, and the Table of Contents template keeps all sections on a single page but provides hyperlinks to each one. You can also create a custom template using Visualforce.

Based on the fields you're creating for each article type, decide how the sections should be organized and which template is the best fit for each channel. For more information and examples of the article-type templates, see Modifying the Layout on page 17 and Choosing a Template on page 18.

Who should have access to your knowledge base?

All Salesforce Knowledge users must have a feature license and grants access to the Article Management tab or the Articles tab.

Decide which users need to manage articles, and give them access to the Article Management tab, where they can create, edit, publish, archive, and delete articles. Decide if you want further control over article management by using article type permissions to limit some article management capabilities. For example, you might want to create a permission set that allows users to delete articles, and then assign that permission set to a limited number of article management "super users." You can also use public groups to further restrict access to any article-management task.

Decide which users need to access but not manage articles, and then create permission sets or profiles that give them access to the Articles tab, where they can search for and view published articles.

For more information, including a description of permissions, see Managing Users on page 20.

Which data categories do you need?

Data categories allow authors to tag articles from among a hierarchy of criteria that you create. For example, you may want authors to classify articles by geographical region and product line. Agents, customers, and partners can search for articles according to category, and administrators can use data categories to control access to articles.

Decide which category groups and individual categories you want to create. For more information see Setting Up Data Categories on page 29.

Do you want to restrict data category access?

By default, all Salesforce Knowledge users can see articles regardless of their category. You can restrict category access by role, permission set, or profile. Once a category is mapped, only users with assigned visibility can see articles classified with the mapped category. Default visibility is available for users without assigned visibility.

Review the category groups you created and the roles, permission sets, and profiles you've assigned (or will assign) to users, then decide how you want to map your categories. For more information, including details about inheritance rules and an example, see Setting Up Data Category Visibility on page 35.

Do you want to set up workflow rules or approval processes?

Determine if you want to create workflow rules or approval processes for some or all of your organization's article types.

Workflow rules let you create email alerts, update fields, or send outbound API messages when an article meets certain criteria. For example, you could create a workflow rule that sends an email alert to the article owner when a new article is created from a case. Note that tasks are not supported by article type workflow.

Approval processes automate the approval of articles. When implemented with Salesforce Knowledge, approval processes give you additional control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information.

Do you want to support articles in multiple languages?

Provide your Salesforce Knowledge articles in the languages your agents and customers are most comfortable with. You can support any language Salesforce supports. For a list of supported languages, see *Which Languages Does Salesforce Support?* in the Salesforce online help.

For each language, decide whether you will Translate your articles within Salesforce or export them for translation with a vendor. For more information see, Providing a Multiple Language Knowledge Base on page 39.

Do you want agents working on cases to find, create, and send articles?

Use the knowledge base to help solve cases by adding the Articles related list to case page layouts. It allows users to initiate a search for relevant articles with one click, then attach successful results to the case or search again with different parameters. You can also customize settings that enable agents to:

- Automatically receive suggested articles when creating a new case, whether in the internal app or a public site.
- Contribute to the knowledge base by creating a draft article when closing a case.
- Select an email template that converts attached articles to PDF files on a message.

For more information, see Enabling Article Options for Cases on page 43.

Do you want members of your answers community to promote replies to articles?

If your organization has an answers community in the Community application, you can give members the opportunity to convert a particularly helpful reply into an article in the knowledge base. After you enable the `Allow users to create an article from a reply` option on the Knowledge Settings page in Setup, community members who have access to create articles will see a **Promote to Article** button on replies. After the article is published, users browsing the answers community will see a link to the article on the reply.

Do you need to import articles from an existing knowledge base into Salesforce Knowledge?

Content from an existing knowledge base can be mapped to article types and imported into Salesforce Knowledge. For detailed instructions, see Importing Articles into Salesforce Knowledge on page 49.

Do you want Customer Portal users to have access to articles?

To give your customers access to the knowledge base, make the Articles tab visible in the Customer Portal. For more information, see Providing Articles in the Customer Portal on page 47.

Do you want partner portal users to have access to articles?

To give your partners access to the knowledge base, make the Articles tab visible in the partner portal. For more information, see Providing Articles in a Partner Portal on page 48.

Do you want to create a public knowledge base on your website?

If you want visitors to your website to view Salesforce Knowledge articles, install the *Public Knowledge Base* app from the AppExchange. To install, configure, and customize your public knowledge base with this package, see the Public Knowledge Base AppExchange App Guide available on the AppExchange.

Do you want users to search using synonym groups?

From Setup, enter `Knowledge Synonyms` in the `Quick Find` box, then select **Knowledge Synonyms** to create and manage synonym groups. Synonym groups are words or phrases that are treated as equivalent in article searches. Users can find articles when entering search terms that do not match any terms in the article if the search term is part of a synonym group. For more information see “Creating Search Synonyms” in the Salesforce Help.

CREATING ARTICLE TYPES

The first step when setting up Salesforce Knowledge is to create one or more article types. You cannot enable Salesforce Knowledge until at least one article type is created.

Creating an article type consists of the following tasks:

1. Specify the properties of your article type, such as Name and Description.
2. Create custom fields for your article type so authors know what information to provide.
3. Arrange the fields into sections by modifying the article-type layout.
4. Choose an article-type template for each channel.
5. Set permissions for the article type.

USER PERMISSIONS

To create, modify, and delete article types:

- "Customize Application"

  AND

  "Manage Salesforce Knowledge"

Specifying Basic Properties

To create an article type:

Note: If, from Setup, you can't find the Knowledge area, make sure `Knowledge User` is selected on your user detail page.

1. From Setup, enter *`Knowledge Article Types`* in the `Quick Find` box, then select **Knowledge Article Types**.
2. Click **New Article Type** or edit an existing article type.
3. Enter the following:

Field	Description
`Label`	A name used to refer to the article type in any user interface pages.
`Plural Label`	The plural name of the object. If you create a tab for this object, this name is used for the tab.
`Gender`	If it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating an article type.
`Starts with a vowel sound`	If it is appropriate for your organization's default language, check if your label should be preceded by "an" instead of "a".
`Object Name`	(Read only) A unique name used to refer to the article type when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. The Object Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include

Field	Description
	spaces, not end with an underscore, and not contain two consecutive underscores.
`Description`	An optional description of the article type. A meaningful description will help you remember the differences between your article types when you are viewing them in a list.
`Track Field History`	Select this option to track the full history of an article and its versions. The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations.
`Deployment Status`	Indicates whether the article type is visible outside Setup. **In Development** means article managers cannot choose this article type when creating articles. Only select **Deployed** after you are done creating the article type.

4. Click **Save**. The article-type detail page opens.

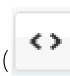
Creating Custom Fields

Article types have only three standard fields, `Summary`, `Title`, and `URL Name`, so at minimum you'll need to create a text field where authors can write the body of the article. Review the following table showing the custom field types available for articles and decide which fields you want to create for your article type:

Field Type	Description
`Article Currency`	In a multiple currency organization, an article can have an article currency field to set the article's currency ISO code.
`Currency`	Allows users to enter a currency amount. The system automatically formats the field as a currency amount. This can be useful if you export data to a spreadsheet application. You can make this field required so a user must enter a value before saving an article. Note: Salesforce uses the round-half-to-even tie-breaking rule for currency fields. For example, 23.5 becomes 24, 22.5 becomes 22, −22.5 becomes −22, and −23.5 becomes −24. Values lose precision after 15 decimal places.
`Date`	Allows users to enter a date or pick a date from a popup calendar. In reports, you can limit the data by specific dates using any custom date field. You can make this field required so a user must enter a value before saving an article.
`Date/Time`	Allows users to enter a date or pick a date from a popup calendar, and enter a time of day. They can also add the current date and

Field Type	Description
	time by clicking the date and time link next to the field. The time of day includes AM or PM notation. In reports, you can limit the data by specific dates and times using any custom date field. You can make this field required so a user must enter a value before saving an article.
`Email`	Allows users to enter an email address, which is validated to ensure proper format. Character limit is 80. If this field is specified for contacts or leads, users can choose the address when clicking **Send an Email**. Note that you can't use custom email addresses for mass emails. You can make this field required so a user must enter a value before saving an article.
`File`	Allows users to upload and attach a file to an article. You can make this field required so a user must enter a value before saving an article. Note the following caveats about File fields: • The maximum attachment size is 25 MB. • You can add up to 5 File fields to each article type; contact Salesforce to increase these limits. • If the `Disallow HTML documents and attachments` security setting is enabled, File fields do not support HTML files. • Text content in a File field attachment is searchable. You can search up to 25 MB of attached files on an article. For example, if an article has six 5 MB file attachments, the first 4.16 MB of each file is searchable. • You cannot attach Salesforce CRM Content files using the File field. • The File field type is not supported in Developer edition. • The filename cannot exceed 40 characters. • You cannot convert a File field type into any other data type.
`Formula`	Allows users to automatically calculate values based on other values or fields such as merge fields. Note: Salesforce uses the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and −12.345 becomes −12.34. In Database.com, the Formula editor does not provide a **Check Syntax** button. Syntax checking occurs when the user attempts to save the formula.
`Lookup Relationship`	Creates a relationship between two records so you can associate them with each other. For example, opportunities have a lookup relationship with cases that lets you associate a particular case with an opportunity. A lookup relationship creates a field that allows

Field Type	Description
	users to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all of the records that are linked to it. You can create lookup relationship fields that link to users, standard objects, or custom objects. If a lookup field references a record that has been deleted, Salesforce clears the value of the lookup field by default. Alternatively, you can choose to prevent records from being deleted if they're in a lookup relationship. You can make this field required so a user must enter a value before saving an article. Lookup relationship fields are not available in Personal Edition. Lookup relationship fields to campaign members are not available; however, lookup relationship fields from campaign members to other objects are available.
`Number`	Allows users to enter any number. This is treated as a real number and any leading zeros are removed. You can make this field required so a user must enter a value before saving an article. Note: Salesforce uses the round half up tie-breaking rule for number fields. For example, 12.345 becomes 12.35 and −12.345 becomes −12.34. Salesforce rounds numbers referenced in merge fields according to the user's locale, not the number of decimal spaces specified in the number field configuration.
`Percent`	Allows users to enter a percentage number, for example, '10'. The system automatically adds the percent sign to the number. You can make this field required so a user must enter a value before saving an article. Note: If the decimal value is greater than 15, and you add a percent sign to the number, a runtime error occurs. Values lose precision after 15 decimal places.
`Phone`	Allows users to enter any phone number. Character limit is 40. You can make this field required so a user must enter a value before saving an article. Salesforce automatically formats it as a phone number. If you are using Salesforce CRM Call Center, custom phone fields are displayed with the button, allowing click-to-dial functionality. Consequently, Salesforce recommends that you do not use a custom phone field for fax numbers.
`Picklist`	Allows users to select a value from a list you define.
`Picklist (Dependent)`	Allows users to select a value from a list dependent on the value of another field.

Field Type	Description
`Picklist (Multi-select)`	Allows users to select more than one picklist value from a list you define. These fields display each value separated by a semicolon.
`Text`	Allows users to enter any combination of letters, numbers, or symbols. You can set a maximum length, up to 255 characters. You can make this field required so a user must enter a value before saving an article.
`Text Area`	Allows users to enter up to 255 characters that display on separate lines similar to a `Description` field. You can make this field required so a user must enter a value before saving an article.
`Text Area (Long)`	Allows users to enter up to 131,072 characters that display on separate lines similar to a `Description` field. You can set the length of this field type to a lower limit, if desired. Any length from 256 to 131,072 characters is allowed. The default is 32,768 characters. Every time a user presses `Enter` within a long text area field, a line break and a return character are added, both count toward the character limit. Also, smart links add more characters than what is displayed. Note: If you lower the character limit and you have articles that surpass the new limit. Those articles can't be edited until the limit is reset higher than their character counts.
`Text Area (Rich)`	Allows users to enter up to 131,072 characters of HTML-supported text including code samples () and smart links between Salesforce Knowledge articles. There are two ways to create smart links: • Search for the article. • Enter the article URL. Note: • You can have up to 100 links to different Salesforce Knowledge articles in one rich text field. • When you convert a text area (rich) field to a text area (long) field, links are displayed as link reference numbers, not URLs. • The upgraded editor doesn't support Internet Explorer version 7 or version 8 in compatibility mode. If you are using these browsers, you will use the older editor.
`URL`	Allows users to enter up to 255 characters of any valid website address. When users click the field, the URL opens in a separate browser window. Note that only the first 50 characters are displayed

Field Type	Description
	on the record detail pages. You can make this field required so a user must enter a value before saving an article.

For each field that you need to create:

1. From Setup, enter *`Knowledge Article Types`* in the `Quick Find` box, then select **Knowledge Article Types**.
2. Select an article type.
3. Click **New** in the Fields related list.
4. Choose the type of field to create, and click **Next**.
5. Enter a field label. The field name is automatically populated based on the field label you enter. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Ensure the custom field name is not identical to any standard field name for that object.
6. Enter any field attributes, such as `Description`, and click **Next** to continue.

   Note: You cannot enter a default value for any custom field.

7. Set the field-level security to determine whether the field should be visible and editable or read only for specific profiles, and click **Next**. Field-level security allows you to control which fields are visible in different channels.
8. If you do not want the field to be added automatically to the article-type layout, uncheck `Yes, add this custom field to the layout`.
9. Click **Save** to finish or **Save & New** to create more custom fields.
10. Optionally rearrange your custom fields on the article-type layout.

Modifying the Layout

Article-type layouts determine which fields users can view and edit when entering data for an article. They also determine which sections appear when users view articles. The format of the article, for example whether layout sections display as subtabs or as a single page with links, is defined by the article-type template. Each article type has only one layout, but you can choose a different template for each of the article type's four channels.

Tip: You can also use field-level security to hide fields on article types. For example, if you publish the same article in the internal app and the Customer Portal, you may want to use field-level security to hide a custom field such as `Internal Comments` from Customer Portal users.

To modify the layout for your article-type:

1. In the Fields related list on your article type's detail page, click **Edit Layout**.
2. When working on the layout:
   - The layout editor consists of two parts: a palette on the upper portion of the screen and the layout on the lower portion of the screen. The palette contains the available fields and a section element. The layout contains an Information section and space for you to add sections. By default, all custom fields are included in the Information section.

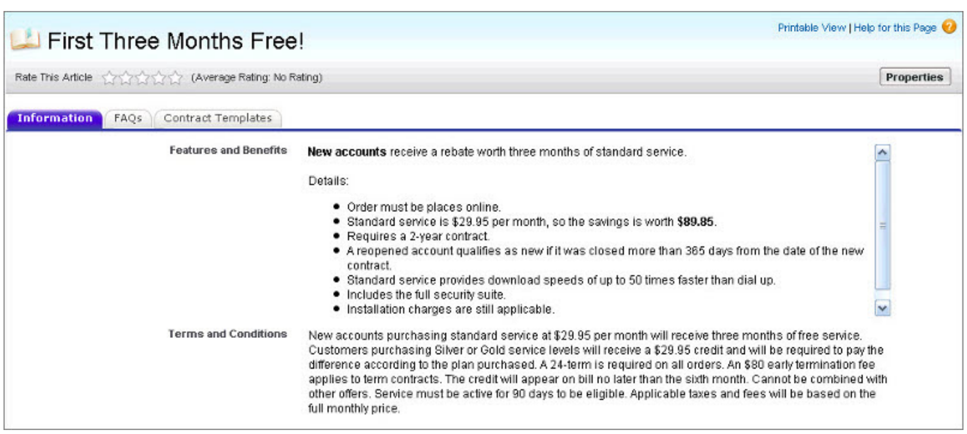
> **Note:** The `Article Number`, `Summary`, `Title`, and `URL Name` standard fields do not display in the layout. `Article Number` and `Summary` appear in a read-only Properties section at the top of the published article. Also included in this header are the `First Published`, `Last Modified`, and `Last Published` fields.

- To add a new section, drag and drop the section element into the palette.
- To change the name of a section, click its title. You cannot rename the Information section.
- To remove a field from a section, drag it to the right side of the palette or click the icon next to the field.
- To remove a section from the article-type layout, click the icon next to the section name.
- Use the undo and redo buttons to step backwards and forwards, respectively.
- Use the following keyboard shortcuts:
  - Undo = CTRL+Z
  - Redo = CTRL+Y
  - Quick Save = CTRL+S
- To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click .
- To quickly locate any item in the palette, use the Quick Find box. The Quick Find box is especially useful for article-type layouts that have large numbers of items available in the palette.
- To save your changes and continue editing the article-type layout, click **Quick Save**.
- To save your changes when you are done customizing the article-type layout, click **Save**. If you navigate away from your article-type layout before clicking save, your changes will be lost.

Choosing a Template

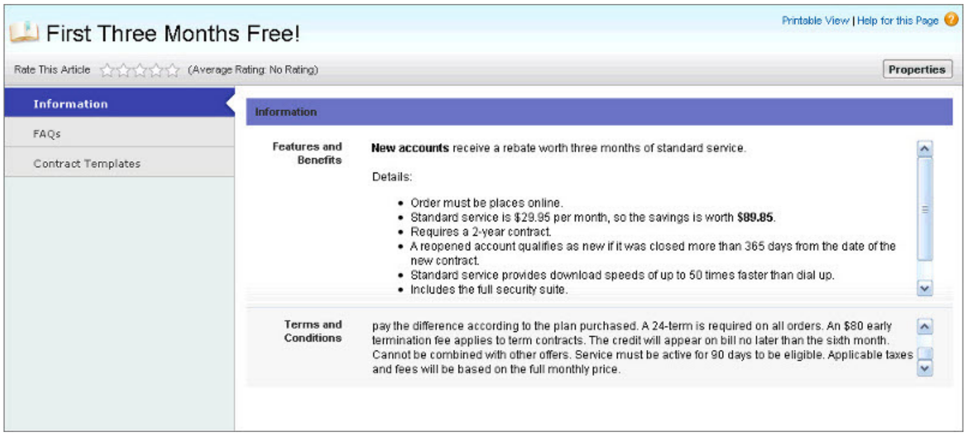
Each channel in an article type must be assigned to an article-type template. There are two standard templates: Tab and Table of Contents. If you choose the Tab template, the sections you defined in the article-type layout appear as tabs in the published article:

Published Article Using the Tab Article-Type Template



If you choose the Table of Contents template, the sections you defined in the article-type layout appear on one page with hyperlinks to each section title:

Published Article Using the Table of Contents Article-Type Template



Assign an article-type template to each channel:

1. In the Channel Displays related list on your article type's detail page, click **Edit**.
2. For each channel, specify the template.

   For the internal app and Customer Portal, **Tab** is the default template. For the public knowledge base, **Table of Contents** is the default template. If a custom template has been created for this article type, the custom template also displays in the drop-down menu.

3. Click **Save**.

To create a custom template, see “Creating Custom Article-Type Templates” in the Salesforce Help.

Setting Article Type Permissions

Before users can access articles associated with the new type, an administrator must assign permissions. Depending on the permissions, users might be able to create, read, edit, or delete articles associated with the new article type.

Deciding which article type permissions to grant is an important part of the Salesforce Knowledge implementation process. For more information on Salesforce Knowledge functionality and user permissions, go to Enabling Salesforce Knowledge and Managing Users on page 20. For more information on managing permissions, see “User Permissions and Access” in the Salesforce Help.

ENABLING SALESFORCE KNOWLEDGE AND MANAGING USERS

Use the following tasks to enable Salesforce Knowledge in your organization and ensure that users have access to the appropriate features.

USER PERMISSIONS

To enable Salesforce Knowledge and modify settings:

- "Customize Application"

  AND

  "Manage Salesforce Knowledge"

To create and edit users:

- "Manage Internal Users"

To create and edit public groups

- "Manage Users"

Enabling Salesforce Knowledge

After creating at least one article type, enable Salesforce Knowledge:

1. From Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings**.
2. Confirm that you want to enable Salesforce Knowledge and click `Enable Knowledge`. It cannot be disabled.
3. Choose a **Default Knowledge Base Language**. This is the language your authors will use to write most of the articles. We recommend that your **Default Knowledge Base Language** and your organization's language be the same.
4. If you want the `Summary` field for each article to display in article lists, select the channels where you want the summaries visible.

Note: The Salesforce Knowledge tabs—Article Management and Articles—are not automatically visible when you enable Salesforce Knowledge. To access the tabs, complete the tasks below.

Managing Users

Full Salesforce license users can read published articles, but not archived or draft articles, without the Knowledge User license. However, other actions (create, edit, delete, and publish) require the Knowledge User license, the Manage Articles permission, and the article action on the article type.

License	Published Article Read Access	Create, Edit, Delete, and Publish Access
Service cloud (Enterprise and Unlimited editions)	Read on the article type	Users need: • Knowledge User license • Manage Articles permission • Article action on the article type
Service cloud (Performance edition)	Read on the article type	Users need: • Manage Articles permission • Article action on the article type
Sales cloud (Enterprise, Unlimited, and Performance editions)	Read on the article type	Users need: • Knowledge User license • Manage Articles permission

License	Published Article Read Access	Create, Edit, Delete, and Publish Access
		• Article action on the article type
Social Intranet	Read on the article type	Not applicable
Communities and Portals	Read on the article type	Not applicable
Chatter Plus	Users need: • Knowledge User license • Read on the article type	Users need: • Knowledge User license • Manage Articles permission • Article action on the article type
Force.com	Users need: • Knowledge User license • Read on the article type	Users need: • Knowledge User license • Manage Articles permission • Article action on the article type

User permissions control access to different features in Salesforce Knowledge. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you might want to create a permission set called “Article Manager” that includes the permissions needed to create, edit, publish, and assign articles.

When creating Salesforce Knowledge profiles, keep the following in mind.

- Users who will create article types, manage article actions, and modify settings need the “Manage Salesforce Knowledge” permission. This permission is on by default in the System Administrator profile.
- Users who will search for and view articles from the Articles tab need the “Read” permission for the article types they need to access, see “Creating and Assigning Salesforce Knowledge Users” in the Salesforce Help.
- Users who will edit draft articles, manage the publishing process, or manage the translation process need the “Manage Articles” permission and the appropriate article type permissions. “Manage Articles” is on by default in the System Administrator profile.
- Users with the “Manage Articles” permission are assigned all article actions automatically. “Article actions” in the Salesforce Help allow users to do things like publish and archive articles or manage the translation process.
- Users who will create data categories need the “Manage Data Categories” permission. This permission is on by default in the System Administrator profile.
- Users who will import articles or import or export translations need the “Read,” “Create,” “Edit,” and “Delete” permissions.

Refer to this table for details on permissions associated with Salesforce Knowledge tasks.

Salesforce Knowledge Task	User Permissions Needed
To create article types:	“Manage Salesforce Knowledge”
To manage article actions:	“Manage Salesforce Knowledge”
To create articles from cases using the simple editor:	“Read” and “Create” on the article type
To create articles from cases using the standard editor:	“Manage Articles” AND

Salesforce Knowledge Task	User Permissions Needed
	“Read” and “Create” on the article type
To search articles from cases and attach articles to cases:	“Read” on the article type
To create articles from answers:	“Read” and “Create” on the article type
To search for and read articles from the Article or Knowledge tab:	“Read” on the article type
To create or edit articles from the Article Management tab:	“Manage Articles” AND “Read”, “Create”, and “Edit” on the article type
To edit draft articles from the Article Management tab:	“Manage Articles” AND “Read” and “Edit” on the article type
To delete articles from the Article Management tab:	“Manage Articles” AND “Read”, “Edit”, and “Delete” on the article type AND A delete article action, set on the Article Actions Setup page.
To publish articles from the Article Management tab:	“Manage Articles” AND “Read”, “Create”, “Edit”, and “Delete” on the article type AND A publish article action, set on Article Actions Setup page
To assign articles for the Article Management tab:	“Manage Articles” AND “Read” and “Edit” on the article type
To edit published or archived articles:	“Manage Articles” AND “Read”, “Create”, and “Edit” on the article type AND A publish or archive article action, set on the Article Actions Setup page
To archive articles from the Article Management tab:	“Manage Articles” AND

Salesforce Knowledge Task	User Permissions Needed
	“Read”, “Create”, “Edit”, and “Delete” on the article type AND An archive article action, set on the Article Actions Setup page
To submit articles for translation:	“Manage Articles” AND “Read”, “Create”, and “Edit” on the article type AND A translate article action, set on the Article Actions Setup page
To delete translated articles:	“Manage Articles” AND “Read”, “Edit”, and “Delete” on the article type AND A delete article action, set on the Article Actions Setup page
To publish translated articles:	“Manage Articles” AND “Read”, “Create”, “Edit”, and “Delete” on the article type AND A publish article action, set on the Article Actions Setup page
To edit translated articles:	“Manage Articles” AND “Read”, “Create”, and “Edit” on the article type AND A translate article action, set on the Article Actions Setup page
To import articles:	“Manage Salesforce Knowledge” AND “Manage Articles” AND “Manage Knowledge Article Import/Export” AND “Read”, “Create”, “Edit”, and “Delete” on the article type
To import and export translated articles:	“Manage Salesforce Knowledge” AND “Manage Articles”

Salesforce Knowledge Task	User Permissions Needed
	AND "Manage Knowledge Article Import/Export" AND "Read", "Create", "Edit", and "Delete" on the article type

Note:
- To delete published article and translations, first remove them from publication by choosing edit or archive.
- When a user without delete access cancels the editing on published article, the newly created article draft is not deleted automatically.

Create Salesforce Knowledge Users

The feature license is indicated by the `Knowledge User` checkbox on the user detail page. If it does not appear, verify that your organization has purchased enough feature licenses. To create users:

1. From Setup, enter *`Users`* in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to the user's name or click **New** to create a new user.
3. If you are creating a new user, complete all the required fields.
4. Select the `Knowledge User` checkbox.
5. Verify that the user has the correct user permissions required.
6. Click **Save**.

Note: To create portal users, see Providing Articles in the Customer Portal or Providing Articles in a Partner Portal on page 48. Public knowledge base visitors do not require authenticated access once the public knowledge base has been created.

Assign Article Actions to Public Groups

To assign article actions to public groups:

1. Create a public group for each set of users.

   Note: Although you can add any Salesforce user to a public group, only users with the "Manage Articles" user permission and the appropriate object permissions can perform article actions.

2. From Setup, enter *`Knowledge Article Actions`* in the `Quick Find` box, then select **Knowledge Article Actions** and decide which users need to perform which actions. For example, you might decide that a group named Publishers needs to publish, archive, and delete articles and that a group named Translators needs to submit articles for translation and publish and archive translated articles.
3. Assign the public groups to article actions:
   a. From Setup, enter *`Knowledge Article Actions`* in the `Quick Find` box, then select **Knowledge Article Actions** and click **Edit**.
   b. For the action you want to modify, select the appropriate radio button and choose a public group. If you don't modify an article action, all users with the "Manage Articles" permission can perform that action.

c. Click **OK** and **Save**.

CREATING WORKFLOW RULES AND APPROVAL PROCESSES

Creating workflow rules and approval processes lets your organization automate many of the tasks involved with managing its knowledge base. When implementing Salesforce Knowledge, you can create workflow rules and approval processes for some or all of the article types used by your organization.

Workflow rules let you create email alerts, update fields, or send outbound API messages when an article meets certain criteria. For example, you could create a workflow rule that sends an email alert to the article owner when a new article is created from a case. Note that tasks are not supported by article type workflow.

Approval processes automate the approval of articles. When implemented with Salesforce Knowledge, approval processes give you additional control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To view workflow rules and approval processes:
- "View Setup and Configuration"

To create or change workflow rules and approval processes:
- "Customize Application"

Creating Workflow Rules for Article Types

1. From Setup, enter `Workflow Rules` in the `Quick Find` box, then select **Workflow Rules** to access the workflow rules list page.
2. On the workflow rules list page, click **New Rule**.
3. Select the article type from the `Select object` drop-down list.
4. Click **Next**.
5. Enter a rule name. Optionally, enter a description for the rule.
6. Select the evaluation criteria.
7. Choose criteria are met
8. Enter criteria for the rule.
9. Click **Save & Next**.
10. Click **Add Workflow Action** and select the type of action for the rule.
11. Enter information required by the action.
12. Click **Save**.
13. Optionally, add a time-dependent workflow action by clicking **Add Time Trigger**.
14. Provide time trigger information and then click **Save**.
15. Click **Done**.

Note: Tasks aren't available for article type workflow rules.

For more information about creating workflow rules, see "Create a Workflow Rule" in the Salesforce Help.

Creating Approval Processes for Article Types

The following is an overview of the steps involved in creating an approval process. For detailed instructions, see "Create an Approval Process" in the Salesforce Help.

1. Choose the Approval Process Wizard. Two wizards are available to help you through the approval set up process. Choose the one that better meets your requirements. See "Choose the Right Wizard to Help You Create an Approval Process" in the Salesforce Help for more information.
2. Provide a name, unique name, and description for the process.
3. Specify criteria for entering the process. For example, you could specify that if the article will be published on a public site it requires approval: `Visible on public site equals True`.
4. Specify approvers for the process. You can allow the submitter to choose an approver, or have the process assign an approver based on your organization's role hierarchy, or to an approval queue, or to a specific user or set of users. For example, you could specify that articles that appear on public sites require review by a member of the legal department.
5. Select the email template that the process will use to notify approvers. When an approval process assigns an approval request to a user, Salesforce automatically sends the user an approval request email. The email contains a link to the approval page in Salesforce, where the user can approve or reject the request and add comments.
6. Configure the approval request page layout. The approver approves or rejects the article from this page. You can add as many fields to this page as you think your users will need to reasonably assess an article's content. For example, you might choose to include information such as a summary of the article's content, the product discussed, and the author's name.
7. Specify which users are allowed to submit articles for approval. For example, for articles that require editing before approval, you could create a public group containing editors, and then specify that only members of that group can submit articles for approval.
8. Activate the approval process.

Tips for Creating Approval Processes

Keep the following in mind when creating approval processes for article types.

- Before you create an approval process, determine which approval process wizard to use.
- Adding an approval process to an article type lets your organization ensure that the required reviewers approve the article before it's published. When an approval process is enabled for an article's article type, the Approval History related list displays on the article details page.
- When creating an approval process, change the final approval action to "Unlock the record for editing" to allow users to publish the article.
- Articles aren't published automatically at the end of an approval process. Users must click **Publish...** to make the article available in the publishing channel(s).
- When an approval process is associated with an article type, users with the "Manage Articles" permission might see both the **Publish...** and the **Submit for Approval** buttons on an article's detail page. (Which buttons they see is determined by both permissions and article actions). These users can publish an article without submitting it for approval. To prevent this from affecting many users, assign the "Publish Articles" article action to a limited group of users instead of giving it to all users with the "Manage Articles" permission. For more information, see "Assigning Article Actions to Public Groups" in the Salesforce Help. You'll still want to make sure that the users with direct publishing capability know which articles need approval before publication.
- Article approvers require the "Manage Articles" permission and at least the "Read" permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.

- Workflow rules and approval processes apply to the "Draft to Publication" portion of the article publishing cycle. Workflow rules aren't available for archiving. Approval processes aren't available for translation or archiving.

  Note: When an article is published from the edit page, the article is first saved and then published. Workflow rules apply to the saved draft article but not the published article.

SETTING UP DATA CATEGORIES

In Salesforce Knowledge, *data categories* are a set of criteria organized hierarchically into category groups. Articles in the knowledge base can be classified according to multiple categories that make it easy for users to find the articles they need. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. Authors assign categories to articles. Administrators can use data categories to control access to articles.

USER PERMISSIONS

To view the Data Categories page:

- "View Data Categories"

To create, edit, or delete data categories:

- "Manage Data Categories"

Overview of Data Categories

A category group is the container for a set of categories. In Salesforce Knowledge it corresponds to the name of the category drop-down menus. For example, if you use the Data Categories page in Setup, (enter *`Data Category`* in the `Quick Find` box, then select **Data Category Setup**) to create and activate a category group called Products, a Products menu displays on the Article Management tab, the article edit page, the Articles tab in all channels, and the public knowledge base.

Implementation Tips

Consider the following information when planning and implementing data categories for your organization:

- You can create up to three category groups with a maximum of five hierarchy levels in each group. Each category group can contain a total of 100 categories.
- If you want to use data categories with Answers, after creating your category group you must assign it from Setup by entering *`Data Category Assignments`* in the `Quick Find` box, then selecting **Data Category Assignments** under Answers. You can only assign one category group to an answers community. Salesforce Knowledge supports multiple category groups.
- Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. Salesforce Knowledge supports a hierarchy of data categories.
- Category groups are hidden from users until they are activated. Do not activate a category group until you have finished defining its categories and their access settings, including their visibility.
- When assigning categories to articles, you can choose up to eight categories in a category group.
- If an article has no categories, it displays only when you choose the `No Filter` option in the category drop-down menu.
- When searching for articles or article translations, selecting a category automatically includes the parent and children of that category and any grandparents, up to and including the top level. Sibling categories are not included. For example, if a category hierarchy has the levels All Products, Switches, Optical Networks, and Metro Core, selecting "Optical Networks" from the category drop-down menu returns articles assigned to any of the four categories. However, if the Switches category has a sibling category called Routers, selecting "Optical Networks" does not return articles classified within Routers. Category visibility settings may limit the specific articles you can find.
- Once visibility settings have been chosen for the categories:
  - Users who are not assigned visibility can only see uncategorized articles and questions unless default category visibility has been set up.

  - For role-based visibility, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers by default. You can change the category group visibility settings for each portal role.
  - If you only have access to one category in a category group, the category drop-down menu for that category group does not display on the Articles tab.
- Deleting a category:
  - Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
  - Permanently deletes its child categories.
  - As applicable, removes the category and its children from the Answers tab, the Article Management tab, the Articles tab in all channels, and your company's public knowledge base.
  - Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
  - Removes its mapping to visibility. Users lose their visibility to articles and answers associated with the deleted category.
- Deleting a category group:
  - Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15–day holding period, you can either restore a category group, or permanently erase it immediately.
  - Deletes all categories within that group.
  - Removes all associations between the group's categories and articles or questions.
  - Removes all associations between the group's categories and visibility.
  - As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.
- You can translate the labels of categories and category groups using the Translation Workbench.

Best Practices

Consider the following tips when using data categories:

- To quickly manage data categories, use keyboard shortcuts.
- After creating or updating categories, set up category group visibility rules.
- Save your changes frequently. The more actions you perform before clicking **Save**, the longer it takes to save.

Creating Category Groups

To create a category group:

1. From Setup, enter `Data Category` in the `Quick Find` box, then select **Data Category Setup**.
2. Click **New** in the Category Groups section.
3. Specify the **Group Name**. This name appears as the title of the category drop-down menu on the Article Management tab, in the article editor, in the Articles tab (all channels) and, if applicable, in the public knowledge base.
4. Optionally, modify the `Group Unique Name`. This is a unique name used to identify the category group in the SOAP API.
5. Optionally, enter a description of the category group.
6. Click **Save**.

Salesforce Knowledge generates a top-level category called “All *name of the category group*”. Optionally, double click it to rename it.

When you add a new category group, it's deactivated by default and only displays on the administrative setup pages for Data Categories, Roles, Permission Sets, and Profiles. Keep your category groups deactivated to set up your category hierarchy and assign visibility. Until you manually activate a category group, it does not display in Salesforce Knowledge or your answers community In addition to activating the category group, for answers communities you must assign the category group to a zone before the categories are visible on the Answers tab.

To activate a category group so it is available to users, move the mouse pointer over the name of the category group and click the `Activate Category Group` icon ( ).

Adding Categories to a Category Group

To add categories to a category group:

1. From Setup, enter *`Data Category`* in the `Quick Find` box, then select **Data Category Setup**.
2. Click the category group name.
3. Click a category that is directly above where you want to add a category (a parent), or at the same level (a sibling).
4. Click **Actions**, then select an action: **Add Child Category** or **Add Sibling Category**.
5. Enter a category name.

   If possible, Salesforce automatically reuses the name you entered as the `Category Unique Name`, a system field which the SOAP API requires.
6. Click **Add**. Alternatively, press Enter.
7. Click **Save**. Save your changes frequently. The more actions you perform before clicking **Save**, the longer it takes to save.

Tip: By default, all Salesforce Knowledge users and zone members can see all categories within an active category group. You can restrict category visibility after you have set up your data categories to ensure that users only access articles and questions that you want them to see.

When working with data categories you can also use the following shortcuts. For details about the actions listed, such as modifying or deleting categories, see the Salesforce online help.

Task	Action	Keyboard Shortcut
Adding a category	Add a sibling to the selected category	ENTER
	Add a child to the selected category	ENTER+TAB
	Close the Add Category field	ESC
	Save changes in the Add Category field	ENTER
Modifying a category	Open the Edit Category field for the selected category	SPACEBAR
	Close the Edit Category field	ESC
	Save changes in the Edit Category field	ENTER
Demoting or promoting a category	Demote a category down one level, as a child of the sibling currently above it	TAB

Task	Action	Keyboard Shortcut
	Promote a category up one level, as a sibling to its current parent	SHIFT+TAB
Deleting a category	Delete the selected category and its children	DELETE
Navigating in the category hierarchy	Move the focus up in the category hierarchy	UP ARROW
	Move the focus down in the category hierarchy	DOWN ARROW
	Collapse children in a parent category	LEFT ARROW
	Expand children in a parent category	RIGHT ARROW
Canceling or repeating an action	Undo the last action	CTRL+Z
	Redo the last action	CTRL+Y
Saving the changes	Save the last changes in the category hierarchy	CTRL+S

Category Filtering Examples

The following table shows how categories can be used as filters to narrow article search results. The examples in the table use the category groups Products and Geography and three sample articles. Assume that the user performing the search has access to all categories.

If you select these category filters...	An article assigned to All Countries AND Laptop is...	An article assigned to Canada AND Computers is...	An article assigned to Europe only is...
All Countries AND All Products	FOUND. Reasons: • All Countries is an exact match. • Selecting All Products automatically includes Laptop.	FOUND. Reasons: • Canada is a child of All Countries. • Computers is a child of All Products.	NOT FOUND. Reasons: • Europe is a child of All Countries, but all filter criteria must be met. • The article is not assigned to a Products category. To retrieve this article, choose No Filter from the category drop-down menu.
Asia AND Computers	FOUND. Reasons: • All Countries is the parent of Asia. • Laptop is a child of Computers.	NOT FOUND. Reasons: • Canada and Asia are not in the same parent/child hierarchy (that is, they are in different branches of the category hierarchy). • Computers is an exact match, but all filter criteria must be met before an article is displayed.	NOT FOUND. Reasons: • Europe and Asia are siblings rather than members of the same parent/child hierarchy. • If an article is not assigned to a category, “No Filter” must be selected in the corresponding category drop-down menu to retrieve the article.

If you select these category filters...	An article assigned to All Countries AND Laptop is...	An article assigned to Canada AND Computers is...	An article assigned to Europe only is...
France AND Enterprise Electronics	NOT FOUND. Reasons: • Laptop is not in a parent/child relationship with Enterprise Electronics. • All Countries is a parent of France but all filter criteria must be met.	NOT FOUND. Reasons: • Canada and France are not members of the same parent/child hierarchy (they are cousins). • Computers and Enterprise Electronics are not members of the same parent/child hierarchy (they are siblings).	NOT FOUND. Reasons: • Europe is the parent of France but all filter criteria must be met. • If an article is not assigned to a category, "No Filter" must be selected in the corresponding category drop-down menu to retrieve the article.
Europe (No other filter)	NOT FOUND. Reasons: • The No Filter criteria on Products only retrieves an article assigned to No Categories. • All Countries is the grandparent of Europe, but all filter criteria must be met.	NOT FOUND. Reasons: • Europe and Canada are not in the same parent/child hierarchy. • The "No Filter" criteria on Products only retrieves an article assigned to No Categories.	FOUND. Reasons: • Europe is an exact match. • On Products, the article is assigned to No Categories and "No Filter" was chosen as a filter.
Americas AND Desktop	NOT FOUND. Reasons: • Laptop and Desktop are siblings rather than members of the same parent/child hierarchy. • All Countries is the parent of America, but all filter criteria must be met.	FOUND. Reasons: • Canada is the child of America. • Computers is the parent of Desktop.	NOT FOUND. Reasons: • America and Europe are siblings rather than members of the same parent/child hierarchy • If an article is not assigned to a category, "No Filter" must be selected in the corresponding category drop-down menu to retrieve the article.

The examples in the table use the Products and Geography category groups. These groups consist of the following hierarchies:

Products Category Group

- All Products
  - Consumer Electronics
    - Cameras
    - Audio
    - Printers
  - Enterprise Electronics

    - Routers
    - Switches
    - PEX
  - Computers
    - Laptops
    - Desktops
    - PDAs

Geography Category Group

- All Countries
  - Americas
    - USA
    - Canada
    - Brazil
  - Asia
    - China
    - Japan
    - India
  - Europe
    - France
    - United Kingdom
    - Poland

SETTING UP DATA CATEGORY VISIBILITY

USER PERMISSIONS

To view role details:	"View Setup and Configuration"
To edit and delete roles:	"Manage Roles"
To edit and delete permission sets and profiles:	"Manage Profiles and Permission Sets"
To view users:	"View Setup and Configuration"
To edit users:	"Manage Internal Users"
To view categories:	"View Data Categories"
To manage data categories:	"Manage Data Categories" AND "View Data Categories"

After creating your data category hierarchy, map your categories to roles, permission sets, or profiles.

Overview of Data Category Visibility Settings

Data category visibility can be set with roles, permission sets, or profiles. Data category visibility determines the individual data categories, categorized articles, and categorized questions that you can see. There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible

With custom data category visibility, you can only see the data categories permitted by their role, permission sets, or profile.

Enforcement of Visibility Settings

To ensure a wide range of relevant information, category group visibility is broadly interpreted. Setting a category as visible makes that category and its entire directly related family line—ancestors, immediate parent, primary children, other descendants—visible to users. For example, consider a Geography category group with continents such as Asia and Europe at the top level, various countries at the second level, and cities at the third level. If France is the only visible category selected, then you can see articles classified with Europe, France, and all French cities. In other words, you can see categories that have a direct vertical relationship to France but you cannot see articles classified at or below Asia and the other continents.

Note: Only the first-level categories in the category group are visible on the Answers tab. In the Geography example, only the continent categories appear on the Answers tab; therefore, if France is the category selected as visible in category group visibility settings, zone members can see questions classified with Europe.

Category group visibility settings are enforced on the Answers tab, the Article Management tab, the Articles tab in all channels (internal app, partner portal, Salesforce.com Community, and Customer Portal), and the public knowledge base. In the following areas, users only see the categories that their visibility settings allow:

- On the Article Management tab, when creating or editing articles
- On the Article Management tab and the Articles tab, the category drop-down menu for finding articles
- On the Answers tab, the categories listed below the zone name

Initial Visibility Settings

If role, permission set, or profile data category visibility has not been set up, all users can see all data categories. However, if data category visibility is set up, users who are not assigned data category visibility by a role, permission set, or profile, only see uncategorized articles and questions unless you make the associated categories visible by default. Role, permission set, and profile visibility settings restrict default visibility settings; in other words, even if a data category is visible by default, it cannot be seen by a user whose role restricts access to that data category.

Note: If data category visibility is defined with roles, permission sets, and profiles, Salesforce uses a logical `OR` between the definitions to create a visibility rule for each user.

Inheritance of Role-Based Visibility Settings

Child roles inherit their parent role's settings and are kept in sync with changes to the parent role. You can customize and reduce the child role's visibility, but you cannot increase it to be greater than that of the parent role. By default, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers. You can change the category group visibility settings for each portal role. Because high-volume portal users don't have roles, you must designate visibility settings by permission set or profile before these users can view categorized articles and questions.

Visibility of Categorized Articles

A user can see an article if he or she can see at least one category per category group on the article. For example, consider an article that is classified with *`California`* and *`Ohio`* in the Geography category group and *`Desktop`* in the Products category group:

- If you have visibility on Ohio and Desktop (but not California), you can see the article.
- If you don't have visibility on either California or Ohio but do have visibility on Desktop, you do not see the article.
- If you have visibility on California but not Desktop, you do not see the article.

Revoked Visibility

Data category visibility can be revoked (set to **None**) for a particular category group. Users in the target role, permission set, or profile can only see articles and questions that aren't classified with a category in that category group. For example, if a user's role has revoked visibility in the Geography category group but visibility to the Products category group, he or she can only see articles that have no categories in Geography and are classified with a category in Products. Because an answers zone can only be assigned to one category group, if the Geography category group was assigned to the zone and a member's role visibility was revoked for that group, the member could only see uncategorized questions.

Editing Data Category Visibility Settings

To edit data category visibility settings:

1. Go to the data category visibility settings page in Setup.
   - For roles: enter `Roles` in the `Quick Find` box, then select **Roles**.
   - For a role on the Customer Portal or partner portal: enter `Users` in the `Quick Find` box, then select **Users**.
   - For permission sets: enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
   - For profiles: enter `Profiles` in the `Quick Find` box, then select **Profiles**.
2. Open a data category group for edit.
   - For roles, in the Category Group Visibility Settings related list, click **Edit** next to the category group you want to modify.
   - For permission sets and profiles:
     a. Click on a permission set or profile name.
     b. Click **Data Category Visibility**.
     c. Click **Edit** next to the data category group you want to assign.
3. Select a visibility setting:

Visibility Setting	Description
`All Categories`	Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a new category group, its visibility is defaulted to `All Categories`.
`None`	Users cannot see any categories in the category group.
`Custom`	Users see your custom selection of categories. For roles, you can choose from the categories that are visible to the parent role. If the parent role's visibility changes to be less than its child's visibility, the child role's category visibility is reset to its parent's category visibility. To select categories, double-click the category in the `Available Categories` box. Alternatively, select a category and then click **Add**. Selecting a category implicitly includes its child and parent categories as well. Categories that are grayed out are not available for selection because their parent has already been selected. Note: If you are customizing a role, permission set, or profile that was previously set to All Categories, you must first remove **All** from the `Selected Categories` box before you can select specific categories.

4. Click **Save**.

Editing Default Category Group Visibility Settings

To modify the default visibility for data categories:

1. From Setup, enter `Default Data Category Visibility` in the `Quick Find` box, then select **Default Data Category Visibility**. All active and inactive category groups are listed.
2. Pick a category group and click **Edit**.
3. To make all the categories in the category group visible by default, select **All Categories**. To make none of the categories visible by default, select **None**. To make some of the categories visible by default, select **Custom**.

4. If you chose Custom, move categories from the Available Categories area to the Selected Categories area as needed. Selecting a category implicitly includes its child and parent categories as well. Move categories from the Selected Categories area back to the Available Categories area to remove default visibility.

PROVIDING A MULTIPLE LANGUAGE KNOWLEDGE BASE

Use the following tasks to provide your Salesforce Knowledge articles in multiple languages.

Enabling Multiple Languages for Salesforce Knowledge

To set up your knowledge base to support multiple languages:

1. If you will send articles to a vendor for translation, you must create a translation queue. For a description of the translation process, see “Supporting Multiple Languages in Your Knowledge Base” in the Salesforce Help.
2. In Setup, enter *`Knowledge Settings`* in the `Quick Find` box, then select **Knowledge Settings** and click **Edit**.
3. Select `Multiple Languages` and add the languages you want to include in your knowledge base. You can only add languages supported by Salesforce.

   Note: You can't remove a language once you've added it to your knowledge base.

4. Optionally, choose the following settings for each language:

Setting	Description
`Active`	Only active languages appear in the New Article dialog and the Submit for Translation dialog. Also, active/inactive status determines whether a published article is visible. For example, if articles are published in Spanish to your partner portal and then you make Spanish an inactive language, the articles are no longer visible to partners.
`Default Assignee`	This value appears in the `Assign To` field of the Submit for Translation dialog. Choose a person or a queue: the individual responsible for translating articles into this language, or the queue used for exporting articles to a localization vendor.
`Default Reviewer`	Select the person who should be assigned to review or publish translations imported in this language.

5. Click **Save**.

Submitting Articles for Translation

To submit articles for translation from the Article Management tab:

1. Select an article or articles and click **Submit for Translation**.
2. Optionally, select a due date for one translation or all translations. You can set dues dates for each language.

   Due dates appear on the Translations list view. They display in red if the date is passed.

3. Select from the languages supported by your knowledge base.
4. Optionally, change the assignee. You can assign the article to another knowledge base user for translation, or assign the article to a queue for export to a translation vendor.
5. If you want email notifications sent to the assignees, check `Send notification email`.
6. Click **Save**.

Translating Articles within Salesforce Knowledge

To translate an article within Salesforce:

1. Click the **Article Management** tab and select **Translations** in the View area.
2. Select **Draft Translations**.
3. Optionally, change the `Assigned To` filter to view articles that are not assigned to you for translation. For example, you may want to view articles assigned to a translation queue.
4. Click **Edit** next to the article and language you want to translate.
5. Enter your translation.
6. Click **Save**.

   Note: You can also edit a published translation. It reverts to draft status until you republish it, although you can choose to keep the existing version published while you update it.

Creating a Queue for Knowledge Article Exports

If your organization wants to use queues in approval processes or send articles for translation outside of Salesforce, you need to create one or more queues. See "Creating Queues" in the Salesforce Help. When authors or reviewers submit an article for review or translation, they select the appropriate queue. For reviews, you can create queues made up of reviewers with different areas of expertise. For translation queues, you can create one queue for each language or combine languages within queues.

To create an article or translation approval queue, add Knowledge Article Version as the object available to the queue.

Exporting Articles for Translation

If your organization sends Salesforce Knowledge articles to a vendor for translation, articles are put into a translation queue.

Note: You can have up to 50 exports in 24 hours and a maximum of 15 pending exports (exports that have not entered a final state such as Completed, Failed, or Canceled).

To generate an export file containing the articles that have been submitted for translation:

1. From Setup, enter *`Export Articles for Translation`* in the `Quick Find` box, then select **Export Articles for Translation**.
2. Select the queue that contains the articles you're exporting.
3. Click either:
   - **All articles** to export every article in the queue.
   - **Updated articles** to only export articles that have been modified or added.

4. Click **Continue**.
5. Select the source and target language pairs you want to export. Salesforce creates a separate .zip file for every article type in each language pair.

   Important: You must retain the .zip file structure for a successful import. For more information, see “Importing Article Translations” in the Salesforce Help.

6. To have the files reviewed or published after being translated, select a user or a queue and then select the name of the user or queue.
7. Select the file character encoding:
   - ISO-8859-1 (General US & Westion European, ISO-LATIN-1)
   - Unicode
   - Unicode (UTF-8) *default*
   - Japanese (Windows)
   - Japanese (Shift_JIIS)
   - Chinese National Standard (GB18030)
   - Chinese Simplified (GB2312)
   - Chinese Traditional (Big5)
   - Korean
   - Unicode (UTF-16, Big Endian)
8. Select the delimiter for the .csv files. The delimiter is the separator for columns when the file is converted to table form. Your options are:
   - Tab (This is the default.)
   - Comma
9. Click **Export Now**.

   You’re notified by email when your export is complete. You can also check the status of your export by viewing the Article Import and Export Queue. From Setup, enter `Article Imports and Exports` in the `Quick Find` box, then select **Article Imports and Exports**.

   For description of status states, see “Viewing Salesforce Knowledge Import and Export Status” in the Salesforce Help.
10. Unzip the exported files, but retain the file structure for a successful import.

Importing Article Translations

Consider the following before importing translated articles into Salesforce:

- You can only import articles that have been exported from the same Salesforce organization. For example, you can't export articles from your test or sandbox organization and import them into your production organization.
- You must place all the translation files (meaning, those exported from Salesforce and translated by your vendor) in a folder whose name is the same as the language code. For example, put French articles in an `fr` folder. Zip up this folder to create your import file.

- To import translated articles successfully, verify that the file structure and their extensions match the file structure and extensions of files exported from Salesforce Knowledge for translation. For example, if the target language is French, the file structure begins as follows:

```
import.properties
 -fr
  --articletypearticlename_kav
   ---articlename.csv
   ---[Article collateral, html, images, etc.]
```

To import translated articles:

1. From Setup, enter *`Import Article Translations`* in the `Quick Find` box, then select **Import Article Translations**.
2. Choose how Salesforce handles translations after they're imported.

Option	Description
`Review imported translations on the Article Management tab before publishing`	Add imported translations to a queue from which users can review them.
`Publish translations immediately on import`	Publish imported translations without reviews.

3. Select the language of the articles you're importing.
4. Optionally, if you chose to have articles reviewed before publishing, select to send the files to a user or a queue and then select the name of the user or queue.
5. Click **Browse**, choose the translation .zip file to upload, and click **Open**.
6. Click **Import Now**.

   If you have more translated articles to upload, repeat steps four through six.

7. Click **Finish**.

   An email notification is sent to you when your import finishes. You can view the status of your import from Setup by entering *`Article Imports and Exports`* in the `Quick Find` box, then selecting **Article Imports and Exports**.

Managing Translations

Once translations are submitted, users with the “Manage Articles” permission can manage them on the **Article Management** tab. To view submitted translations, select **Translations** in the View area. You can edit, preview, publish, assign, and delete translations.

ENABLING ARTICLE OPTIONS FOR CASES

To integrate cases with your knowledge base, begin by adding the Articles related list to case page layouts so agents can search for articles from cases.

The following tasks are optional depending on which features you want to make available to support agents.

Enabling Suggested Articles on New Cases

Suggested articles help knowledge base users solve cases quickly. As soon as a new case is saved, the search engine automatically looks for articles that have keywords in common with the case subject. The user working the case can scan the articles and attach them to the case if needed, or initiate another search with different keywords. Articles attached to the case appear on the Articles related list, which also provides a **Find Articles** button to search the knowledge base at any time.

To enable suggested articles:

1. From Setup, enter `Support Settings` in the `Quick Find` box, then select **Support Settings**.
2. Click **Edit** and choose **Enable suggested articles**. Suggested articles and suggested solutions cannot be enabled at the same time.
3. Choose each audience (channel) that should receive suggested articles when submitting a case. Suggested articles are available for the internal app and the portals.
4. When you're done with the Support Settings page click **Save**.

USER PERMISSIONS

To change support settings:
- "Manage Cases"

  AND

  "Customize Application"

To view articles:
- "Read" on the article's article type

Enabling Article Submission During Case Close

To quickly capture information that helped solve a case, users can close a case and be taken directly to a draft article. When the article is published, it is automatically attached to the original case and is available in the knowledge base for easy search and reference.

To enable the **Save and Create Article** button on the close-case page:

1. From Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings**.
2. Select `Allow users to create an article when closing a case`. You must also choose:
   - A default article type. This determines which fields appear on the draft article. By default the `Title` field on all articles contains the case subject.
   - An article assignee. All draft articles created when a case is closed are sent to the assignee for review. The assignee can edit, publish, delete, or reassign the article. When the article is published, it is automatically attached to the Articles related list on the case detail page.
3. Optionally, create an Apex class that pre-populates fields on the draft article, then select the class from the `Use Apex customization` field. For detailed instructions, see “Example Apex Customization for Submitting Articles from Cases” in the Salesforce Help.
4. When you're done with the Settings page, click **Save**.

   Tip: The `Use a profile to create customer-ready article PDFs on cases` option is described below in Creating an Email Template for Sending Articles.

5. From Setup, enter `Cases` in the `Quick Find` box, select **Page Layouts**, and edit each close-case layout.
   - Click **Layout Properties**.
   - Select the `Enable submissions during case close` checkbox and choose **Submit Articles**. You can only submit articles or solutions, not both.
   - Click **Save**.

USER PERMISSIONS

To edit Salesforce Knowledge settings:
- “Customize Application”

To modify page layouts:
- “Customize Application”

To create articles:
- “Read” and “Create” on the article type used to create articles from cases

  AND

  `Knowledge User` checked on the user detail page

To create cases:
- “Create” on cases

Creating an Email Template for Sending Articles

USER PERMISSIONS

To set up Email-to-Case or On-Demand Email-to-Case:	“Customize Application”
To enable Email-to-Case or On-Demand Email-to-Case:	“Modify all Data” AND “Customize Application”
To customize page layouts:	“Customize Application”
To create or change HTML email templates:	“Edit HTML Templates”
To create or change public email template folders:	“Manage Public Templates”

To create or change Visualforce email templates:	"Customize Application"

If articles are associated with a case, users working on the case can attach PDF versions of the articles to an email simply by choosing a template you create. This capability is available if Email-to-Case or On-Demand-Email-to-Case is set up and the Email related list is visible on case page layouts. See Set Up On-Demand Email-to-Case for more information.

To allow users working on a case to automatically attach article PDFs to an email message:

1. From Setup, enter *`Email Templates`* in the `Quick Find` box, then select **Email Templates**.
2. Click **New Template** to create a template from scratch or click **Edit** next to an existing template. The new or edited template must include the `Articles as PDFs` case field.
3. For example, If you want to edit the *SUPPORT: Case Response with Solution (SAMPLE)* template to include articles instead of solutions, complete these steps:
   a. Click **Edit** next to the *SUPPORT: Case Response with Solution (SAMPLE)* template.
   b. Change the `Email Template Name` to *SUPPORT: Case Response with Article (SAMPLE)*.
   c. Modify the `Template Unique Name` as needed.
   d. Choose **Case Fields** from the Select Field Type drop-down menu.
   e. Choose **Articles as PDFs** from the Select Field drop-down menu.
   f. Copy the value from the `Copy Merge Field Value` field and paste it in the email body.
4. Click **Save**.

   On the case detail page in the Emails related list, users can now click **Send an Email** and choose the new template. Articles associated with the case are automatically converted to PDF attachments, and the attachments can be previewed or deleted if needed before the email is sent.

Note: Both the article and the knowledge base must be in the same language. For example, if your knowledge base language is English but you want a Japanese article converted into a PDF, change your knowledge base language to Japanese (in Setup, enter *`Knowledge`* in the `Quick Find` box, select **Knowledge Settings**, then click **Edit**) before converting the article.

Notes on Field Visibility in Article PDFs

Consider the following information when using email templates that include the **Articles as PDFs** function:

- The fields that appear in article PDFs are determined by your profile if the `Use a profile to create customer-ready article PDFs on cases` checkbox (from Setup, enter *`Knowledge Settings`* in the `Quick Find` box, then select **Knowledge Settings**) is not selected. If you can see all fields in the original article, all fields also appear in the automatically generated PDF. If field-level security restricts you from seeing a field on an article, that field and its data do not appear in the article's PDF.
- If the `Use a profile to create customer-ready article PDFs on cases` checkbox is selected and a profile is chosen from the **Profile** menu (from Setup, enter *`Knowledge Settings`* in the `Quick Find` box, then select **Knowledge Settings**), the chosen profile determines which fields appear in automatically generated PDFs. For example, if you are sending article PDFs to customers, you might choose the Customer Portal User profile to ensure that internal-only fields do not appear in article PDFs.
- Fields in the Properties section of an article, including `First Published`, `Last Modified`, `Last Published`, and `Summary`, are not included in any PDF version regardless of setting or profile.

PROVIDING ARTICLES IN A COMMUNITY

You can use Communities to access your knowledge base articles if your Salesforce organization has a Salesforce Knowledge license. Once Salesforce Knowledge is enabled, complete the following steps to view articles in your communities.

1. Update profiles.
   - Clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles and enable the "Read" permission for article types you want to share with community users.
   - Verify that the tab visibility for the Articles (or Knowledge) tab is Default On.
   - Remember to click **Edit Profiles**, at the bottom of the detail page, and activate the new profile.
2. Add the Articles (or Knowledge) tab to each community:
   a. In Community Management, click **Administration** > **Tabs**.
   b. Select the Articles tab and click the **Add** arrow to move the tab into the Selected Tabs box. To change the order of the tabs, use the **Up** or **Down** arrows.
   c. Click **Save**.
3. Assign the cloned profiles to your community users.
   a. Display the contact detail page.
   b. To create a new user, click **Manage External User** then choose either **Enable Partner User** or **Enable Customer User**.

      To update an existing user, click **Manage External User** then choose **View Partner User** or **View Customer User**
   c. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
   d. Click **Save**.
4. If you want your community users to have different category group visibility settings, change the visibility settings by permission set, profile, or role. For example, you can prohibit users with the Customer Community User profile from seeing articles in a certain category group by changing the data category visibility for that profile.
5. Notify users who create articles that they must select **Customer** for users with Customer Community or Customer Community Plus licenses, or **Partner** for users with Partner Community licenses, as a channel option when creating or modifying an article. If the appropriate channel is not selected, the article is not published in the community.

EDITIONS

Available in: Salesforce Classic

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND is a member of the community they're trying to update

To set up Salesforce Knowledge, create article types and article actions, and modify category groups assignments:
- "Customize Application"

  AND

  "Manage Salesforce Knowledge"

To assign user licenses:
- "Manage Internal Users"

To create data categories:
- "Manage Data Categories"

PROVIDING ARTICLES IN THE CUSTOMER PORTAL

You can use the Customer Portal to provide your customers with access to Salesforce Knowledge articles. Portal users can view and rate articles but cannot create or edit articles.

After you have enabled Salesforce Knowledge and the Customer Portal in your organization, complete the steps below to make articles visible to portal users. For instructions on enabling the Customer Portal and managing profiles, see the Salesforce online help.

1. Update Customer Portal profiles:
   a. Clone the Customer Portal User or Customer Portal Manager profiles to include the "View Articles" user permission.
   b. In the cloned profiles, verify that the tab visibility for the Articles tab is Default On.
2. Activate the new profile:
   a. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.
   b. Click the name of the Customer Portal to open the detail page.
   c. In the Assigned Profiles related list, click **Edit Profiles** and activate the new profile.
3. Add the Articles tab to each Customer Portal:
   a. On the Customer Portal detail page, click **Customize Portal Tabs**.
   b. Select the Articles tab and click the **Add** arrow to move the tab into the Selected Tabs box. To change the order of the tabs, use the **Up** or **Down** arrows.
   c. Click **Save**.
4. Assign the cloned profiles to your Customer Portal users:
   a. Display the contact detail page.
   b. To create a new Customer Portal user, choose **Enable Customer User** from the **Manage External User** drop-down button. To update an existing user, click **View Customer User**.
   c. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
   d. Click **Save**.

      Note: Customer Portal users inherit the same roles and category group visibility settings as their account managers. If you want to modify article access for portal users, change the portal role's category group visibility settings. If data categories are assigned default visibility, users without assigned visibility can see articles associated with those categories.
5. Notify publishers that they must select **Customer** as a channel option when creating or modifying articles to make the articles visible in the portal.
6. To allow users to search for articles from the Home tab, add the Article Search component to the home-page layout. For more information, see "Design Home Page Layouts" in the Salesforce Help.

USER PERMISSIONS

To set up and update the Customer Portal:
- "Customize Application"

To create and edit profiles:
- "Manage Profiles and Permission Sets"

To manage Customer Portal users:
- "Edit Self-Service Users"

To view Salesforce Knowledge articles:
- "Read" on the article's article type

PROVIDING ARTICLES IN A PARTNER PORTAL

You can use the partner portal to provide your partners with access to Salesforce Knowledge articles. Portal users can view and rate articles but cannot create or edit articles.

After you have enabled Salesforce Knowledge and the partner portal in your organization, complete the steps below to make articles visible to portal users. For instructions on enabling the partner portal and managing profiles, see the Salesforce online help.

1. Update Partner User profiles:
   a. Clone the Partner User profiles to include the "View Articles" user permission.
   b. In the cloned profiles, verify that the tab visibility for the Articles tab is Default On.
2. Activate the new profile:
   a. From Setup, enter `Partner` in the `Quick Find` box, then select **Settings**.
   b. Open the partner portal detail page.
   c. In the Assigned Profiles related list, click **Edit Profiles** and activate the new profile.
3. Add the Articles tab to each partner portal:
   a. On the partner portal detail page, click **Customize Portal Tabs**.
   b. Select the Articles tab and click the **Add** arrow to move the tab into the Selected Tabs box. To change the order of the tabs, use the **Up** or **Down** arrows.
   c. Click **Save**.
4. Assign the cloned profiles to your partner portal users:
   a. Display the contact detail page.
   b. To create a new partner portal user, click **Enable Partner User** from the **Manage External User** drop-down button. To update an existing user, click **View Partner User**.
   c. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
   d. Click **Save**.

   Note: Partner portal users inherit the same roles and category group visibility settings as their account managers. If you want to modify article access for portal users, update the portal role's category group visibility settings.
5. Notify publishers that they must select **Partner** as a channel option when creating or modifying articles to make the articles visible in the portal.
6. To allow users to search for articles from the Home tab, add the Article Search component to the home-page layout. For more information, see "Design Home Page Layouts" in the Salesforce Help. Ensure that you assign the layout to the partner user profiles.

EDITIONS

Available in: Salesforce Classic

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To set up and update the partner portal:
- "Customize Application"

To create and edit profiles:
- "Manage Profiles and Permission Sets"

To manage portal users:
- "Manage Portal Users"

  OR

  "Manage External Users"

To view Salesforce Knowledge articles:
- "Read" permission on article type(s) available on the partner portal

IMPORTING ARTICLES INTO SALESFORCE KNOWLEDGE

The Article Importer tool allows you to import articles from an existing knowledge base into Salesforce Knowledge. Importing articles requires the following tasks.

1. Preparing Articles for Import to Salesforce Knowledge
2. Creating a .csv File for Article Import
3. Specifying Parameters for Article Import
4. Creating a .zip File for Article Import
5. Viewing Salesforce Knowledge Import and Export Status

USER PERMISSIONS

To import articles:
- "Manage Salesforce Knowledge"

  AND

  "Manage Articles"

  AND

  "Manage Knowledge Article Import/Export"

  AND

  "Read," "Create," "Edit," and "Delete" on the article type

To view articles:
- "Read" on the article type

To create articles:
- "Manage Articles"

  AND

  "Read" and "Create" on the article type

Preparing Articles for Import to Salesforce Knowledge

Import articles one article type at a time. Sort articles by information type (for example, FAQ or Offer) and ensure each information type has a correspondingSalesforce Knowledge article type that matches its structure and content. For example, if you are importing FAQs, ensure that Salesforce Knowledge has an FAQ article type with enough question and answer fields to accommodate the largest FAQ article. If field-level security is set up for any fields on the article type, verify that you have permission to edit these fields.

Images can only be imported as part of an HTML file. Ensure that all your images are included in an HTML file and referenced with a relative path using the `img` tag and its attribute `src`.

If your articles contain HTML files, use an article type that contains a rich text area field and ensure that the HTML is compliant with the supported tags and attributes. For a list of the tags and attributes used with rich text area fields, see "Using the HTML Editor" in the Salesforce Help.

Note: Test your import using a small set of articles.

Creating a .csv File for Article Import

Each .csv file imports articles into one article type and maps the imported articles' content with the article type's fields. For example, a .csv file might map articles' titles with the standard field `Title` in an article type, meaning that each article's title is imported into the `Title` field.

1. Create one .csv file per article type.
   - There can only be one .csv file and one .properties file.
   - The .csv file and the .properties file must be in the root directory.
   - The compression process must preserve the folder and subfolder structure.
   - The .zip file name can't contain special characters.
   - The .zip file can't exceed 10 MB and the uncompressed files can't exceed 100 MB.

- .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
- .csv file rows can't exceed 400,000 characters.
- .csv file cells can't exceed 32 KB.
- Each article in the .csv file can't have more than 49 translations.

2. In the first row, specify the article type's fields and metadata (such as language data categories or channels). Enter one item in each column. You can use the following fields and metadata to import content:
   - `isMasterLanguage`—identify the article as a master (1) or translation (0). Required to import articles with translations, however, it can't be in a .csv file to import articles without translations. Translations must follow their master articles so that they are associated with the master article preceding it.
   - `Title`—the article or translation's title. Required for all imports.
   - Standard or custom fields—refer to an article type's standard fields using field names and refer to custom fields using API names. Leaving a row cell empty may cause your articles to be skipped if the related article-type field is mandatory.
   - Rich text area field—use the rich text area custom fields to import .html files or images. Refer to an article type's rich text area field using its API name.
   - File field—use the file custom fields to import any file type (.doc, .pdf, .txt, etc.). Refer to an article type's file field using its API name.
   - To categorize the imported articles, use category groups; refer to a category group using its unique name prefixed with `datacategorygroup.` For example, use `datacategorygroup.Products` to specify the category group Products.
   - To specify where the imported articles are available, use the keyword `Channels`.
   - Language—specify the articles' language. Required to import articles with translations. Optional to import articles without translations. If you don't include this column, the articles will automatically belong to the default knowledge base language and you can't import translations along with the master articles.

3. In subsequent rows, specify the articles you want to import. Use one row per article and enter the appropriate information in each article type field column or metadata column.
   - Standard or custom fields—enter the articles' data for each field, except for rich text area fields where you must enter the relative path to the corresponding .html file in your .zip file.

     Note: The article importer does not support sub-fields. If you have fields within fields, you'll need to adjust your structure and content before importing into Salesforce Knowledge.

   - Rich text area field—always enter the .html file path relative to the location of the .csv file. Never enter raw text. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing HTML and images:
     - We recommend that you create separate folders for the .html files (for example, `/data`) and the images (for example, `data/images`).
     - To import images, include the images in an .html file using the `<img>` tag and `src` attribute. Ensure that the `src` value is a relative path from the .html file to the image folder.
     - Images must be `.png`, `.gif`, or `.jpeg` files.
     - Each image file can't exceed 1 MB.
     - .html files can't exceed the maximum size for their field.
     - If a date doesn't match the date format specified in the property file, the related article isn't imported.
     - If an .html file references a file that isn't allowed, the related article isn't imported.
     - If an .html file references an image that's missing, the related article is imported without the image.

- File field—enter the path relative to the file's location. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing files:
  - We recommend that you create a folder for your files (for example, `/files`).
  - Each file must not exceed 5 MB.
- Category groups—use category unique names to categorize articles. Use the plus symbol (+) to specify more than one category. For example, `Laptop+Desktop`. Note the following information about data category groups:
  - Leaving the cell row empty causes your article to be set to No Categories.
  - If you specify a category and its parent (for example, Europe+France) the import process skips the child category France and keeps the parent category Europe, because application of a parent category implicitly includes the category's children.
  - When importing articles with translations and associated data categories, only the master article retains the data categories. The article translations have no associated data category upon import.
- Channels—specify articles' channels using the keywords:
  - `application` for Internal App. If you don't specify a channel, `application` is the default.
  - `sites` for Public Knowledge Base.
  - `csp` for Customer.
  - `prm` for Partner.

  Use the plus (+) symbol to specify more than one channel (for example, `application+sites+csp` to make an article available in all channels).

  Note: When importing articles with translations and associated channels, only the master article retains the channels. The article translations have no associated channels upon import.

The following example .csv files import articles in a Product Offer article type. The first example is for imports of articles without translations. The second is for imports with translations. The .csv files contain titles, summaries, and descriptions. They also classify the articles in the category group Products and make them available for specific channels. The `description__c` field is a rich text area and only supports paths to .html files. The `summary__c` field is a text field and only supports raw text. The "Best Desktop Computer Deals" article has no summary; the cell is left blank because the `summary__c` field is not mandatory.

Title	summary__c	description__c	datacategorygroup .Products	Channels
Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_ Electronics	application+csp
Best Desktop Computer Deals		data/bestdeals.html	Desktop	application+csp
Free Shipping on Laptop and Desktops		data/freeship.html	Laptop+Desktops	application+csp

Example `articlesimport.csv` file:

```
Title,summary__c,description__c,datacategorygroup.Products,Channels
Free Digital Camera Offer, Get the new Digital
Camera.,data/freecam.html,Consumer_Electronics,application+csp
Best Desktop Computer Deals,,data/bestdeals.html,Desktop,application+csp
Free Shipping on Laptop and Desktops,,data/freeship.html,Laptop+Desktops,application+csp
```

isMaster Language	Title	summary__c	description__c	datacategorygroup .Products	Channels	Language
1	Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_ Electronics	application +csp	en_US
0	Libérer l'Offre d'Appareil photo digital	Obtenir le nouvel Appareil photo digital.	data/freecam/fr.html			fr
0	Liberte Oferta Digital de Cámara	Consiga la nueva Cámara Digital.	data/freecam/es.html			es
1	Best Desktop Computer Deals		data/bestdeals.html	Desktops	application +csp	en_US
0	Meilleures Affaires d'ordinateurs de bureau		data/bestdeals/fr.html			fr
0	Mejores Tratos de ordenadores		data/bestdeals/es.html			es
1	Free Shipping on Laptops and Desktops		data/freeship.html	Laptops+ Desktops	application +csp	en_US
0	Libérer Affranchissement sur Portables et Ordinateurs		data/freeship/fr.html			fr
0	Liberte Franqueo en Laptops y Ordenadores		data/freeship/es.html			es

Example `articlestranslationsimport.csv` file:

```
isMasterLanguage,Title,summary__c,description__c,datacategorygroup.Products,Channels,Language
1,Free Digital Camera Offer,Get the new Digital
Camera,data/freecam.html,Consumer_Electronics,application+csp,en
0,Libérer l'Offre d'Appareil photo digital,Obtenir le nouvel Appareil photo
digital.,data/freecam/fr.html,,,fr
0,Liberte Oferta Digital de Cámara,Consiga la nueva Cámara Digital.,data/freecam/es.html,,,es
1,Best Desktop Computer Deals,,data/bestdeals.html,Desktops,application+csp,en
0,Meilleures Affaires d'ordinateurs de bureau,,data/bestdeals/fr.html,,,fr
0,Mejores Tratos de ordenadores,,data/bestdeals/es.html,,,es
1,Free Shipping on Laptop and
Desktops,,data/freeship.html,Laptops+Desktops,application+csp,en
0,Libérer Affranchissement sur Portables et Ordinateurs,,data/freeship/fr.html,,,fr
0,Liberte Franqueo en Laptops y Ordenadores,,data/freeship/es.html,,,es
```

Specifying Parameters for Article Import

Specify import parameters in a property file using key names and corresponding values. For example, use the key `DateFormat` to specify that a date custom field appears in the `DateFormat=dd/MM/YYYY` format or specify the character encoding to be used for the import.

Create a file with the `.properties` extension and specify the required parameters, as described in this table.

Key	Description	Default Value
DateFormat	Format of the date to read in the .csv file	yyyy-MM-dd

Key	Description	Default Value
DateTimeFormat	Format of the date and time to read in the .csv file	yyyy-MM-dd HH:mm:ss
CSVEncoding	Character encoding used to read the .csv file	ISO8859_15_FDIS
CSVSeparator	.csv file separator	,
RTAEncoding	Default encoding used for the HTML files (if not specified in the `charset` attribute from the HTML `meta` tag). Note: Salesforce does not support UTF-32 character encoding. We recommend using UTF-8. If you use specify UTF-16 character encoding, ensure your HTML files specify the right byte-order mark.	ISO8859_15_FDIS

Note: You must specify only Java date formats. Make sure the date format is not misleading. For example, if you choose the format yyyy-M-d, a date entered as 2011111 can be interpreted as 2011-01-11 or 2011-11-01. Specify at least :

- Two digits for month and day format (MM, dd)
- Four digits for year format (yyyy)

If a date in the .csv file does not match the date format specified in the property file, the related article is not imported.

Example `offerarticlesimport.properties` property file:

```
DateFormat=yyyy-MM-dd
DateTimeFormat=yyyy-MM-dd HH:mm:ss
CSVEncoding=ISO8859_15_FDIS
CSVSeparator=,
RTAEncoding=UTF-8
```

Creating a .zip File for Article Import

To complete the import, create a .zip file containing:

- The .csv file.
- The folder containing the .html files to import.
- The folder containing the image files referenced in the .html files.
- The .properties file.

The import .zip file must meet the following requirements:

- There can only be one .csv file and one .properties file.
- The .csv file and the .properties file must be in the root directory.
- The compression process must preserve the folder and subfolder structure.

- The .zip file name can't contain special characters.
- The .zip file can't exceed 10 MB and the uncompressed files can't exceed 100 MB.
- .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
- .csv file rows can't exceed 400,000 characters.
- .csv file cells can't exceed 32 KB.
- Each article in the .csv file can't have more than 49 translations.

Upload your .zip file:

1. From Setup, enter `Import Articles` in the `Quick Find` box, then select **Import Articles**.
2. Select the appropriate **Article Type** for the imported articles.
3. Click **Browse** to select the .zip file, and click **OK**.
4. If your import contains translations, select the `Contains translations?` checkbox.

   Note: If this checkbox is selected, your .csv file must contain the isMasterLanguage, Title, and Language columns. If this checkbox is not selected, your csv file can't contain the isMasterLanguage column but must contain the Title column. The Language column is optional for imports of articles without translations.

5. Click **Import Now**.

   When the import is complete you receive an email with an attached log that provides details about the import.

Viewing Salesforce Knowledge Import and Export Status

To check the status of your imports and exports, from Setup, enter `Article Imports` in the `Quick Find` box, then select **Article Imports**. If you've enabled multiple languages for Salesforce Knowledge, you see two tables: one for article and translation imports and another for exports for translation.

Status descriptions are as follows:

Status	Description	Possible Action
Pending	The import or export will start as soon as the previous pending import or export completes.	You can click **Cancel** to cancel the import or export.
Processing	The import or export is processing.	If you want to stop the process, or if the process has been stopped, call Salesforce Support. Salesforce may stop an import or export if a maintenance task has to be performed or the import or export exceeds one hour.
Stopping/Stopped	Salesforce Support is stopping or has already stopped the import or export.	Contact Salesforce Support to restart the import or export, or click **Cancel** to cancel an entry.
Aborted	The import or export has been canceled. The articles that already imported or	You can restart an import or export, click **Del** to delete an entry, or click **Email Log** to

Status	Description	Possible Action
	exported successfully are available in Salesforce.	receive the completion email and check the details of your import or export.
Completed	The import or export is complete. Successfully imported articles are visible on the Article Management tab on the `Articles` subtab. Successfully imported translations are visible on the Article Management tab on the `Translations` subtab.	Note that this status doesn't mean the import or export is successful. Click **Email Log** to see the log file attached to the completion email and check the details of your import or export. Click the exported .zip file name to save or open the file on your system.

USING KNOWLEDGE-CENTERED SUPPORT PRACTICES IN SALESFORCE KNOWLEDGE

Salesforce Knowledge is now "KCS Verified" by the Consortium for Service Innovation, which recognizes best practices in customer support methodologies. By implementing Knowledge-Centered Support (KCS) features in your organization, you can create more efficient collaboration within your team of Salesforce Knowledge users, and provide pertinent and accurate information to your customers.

This chapter lists some important steps in implementing this exciting group of features that make the best practices in the industry available to your organization. These implementation steps include:

- Defining KCS User Profiles
- Enabling KCS Settings
- Defining Validation Status Picklist Values
- Creating Users
- Creating Public Groups
- Assign Article Actions to Public Groups
- Creating and Activating Knowledge Actions
- Creating Approval and Publishing Queues
- KCS Approval Processes and Article Actions

Defining KCS User Profiles introduces four different types of users, each with different article-related access levels and permissions. Examples throughout this chapter refer back to these users to illustrate how your implementation of KCS capabilities impacts your organization's Knowledge users and how they work. This chapter also uses example validation statuses, public groups, queues, and approval processes to demonstrate how to implement KCS-related features in your own organization.

To learn more about KCS best practices, see the Consortium for Service Innovation.

Defining KCS User Profiles

Your Salesforce Knowledge users are a mixture of different levels of job experience and expertise in the products and services your company offers. This chapter outlines four basic types of KCS users and some of the permissions they need to perform their jobs.

Scott: The KCS Reader

Scott Jackson is relatively new to the company, so he's a basic user of the knowledge base. Currently, he has read-only access to articles, so he can search and view articles. Readers don't author or publish, so he won't belong to a public group or need to submit articles for approval.

He needs the following permissions to perform his job duties:

Scott	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	**Manage Articles**	**Read**	**Create**	**Edit**	**Delete**
Search articles from and attach articles to cases		✓			
Search for and read articles from the Articles tab		✓			

Amber: The KCS Candidate

Amber Delaney is a candidate-level user and can create and publish articles with statuses of either `Work in Progress` or `Not Validated`. If Amber works on an article with a different validation status, she must send it to a queue for approval before it's published.

Amber is part of the KCS Candidate public group and submits the articles she can't publish to the Publishing External queue.

She needs the following permissions to perform her job duties:

Amber	**Permission**	**Article Type-Specific Permissions**			
Salesforce Knowledge Functionality	**Manage Articles**	**Read**	**Create**	**Edit**	**Delete**
Search articles from and attach articles to cases		✓			
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Edit published or archived articles	✓	✓	✓	✓	

Anne: The KCS Contributor

As a contributor, Anne Murphy is a more advanced KCS user. She understands the standards for articles in the organization and can create articles and publish articles with `Validated Internal` status. She can also work on articles authored by other users if they have either `Work in Progress` or `Not Validated` statuses, and can change them to `Validated Internal`. Since she doesn't have permission to publish articles to an external audience, she must submit those customer-facing articles to the Publishing External queue.

Note: Article approvers require the "Manage Articles" permission and at least the "Read" permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.

Anne is a member of the KCS Contributor public group.

She needs the following permissions to perform her job duties:

	Permission	**Article Type-Specific Permissions**			
Salesforce Knowledge Functionality	**Manage Articles**	**Read**	**Create**	**Edit**	**Delete**
Create new articles from cases using the simple editor		✓	✓		
Create new articles from cases using the standard editor	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Create new articles from answers		✓	✓		
Search for and read articles from the Articles tab		✓			

	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	**Manage Articles**	**Read**	**Create**	**Edit**	**Delete**
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓
Assign articles from Article Management tab	✓	✓		✓	
Edit published or archived articles	✓	✓	✓	✓	
Archive articles from the Article Management tab	✓	✓	✓	✓	✓

Pat: The KCS Publisher

Pat Brown is Knowledge domain expert and is responsible for reviewing and publishing articles to an external audience.

Pat is a member of the KCS Publisher public group. Pat also belongs to the Publishing External queue.

He needs the following permissions to perform his job duties:

	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	**Manage Articles**	**Read**	**Create**	**Edit**	**Delete**
Create new articles from cases using the simple editor		✓	✓		
Create new articles from cases using the standard editor	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Create new articles from answers		✓	✓		
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓
Publish article from Article Management tab	✓	✓	✓	✓	✓
Assign articles from Article Management tab	✓	✓		✓	

	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	**Manage Articles**	**Read**	**Create**	**Edit**	**Delete**
Edit published or archived articles	✓	✓	✓	✓	
Archive articles from the Article Management tab	✓	✓	✓	✓	✓

Understanding Job Functions for KCS Roles

Each user profile defines a user's permission to perform different job duties and functions. To enable users to perform these functions, you create public groups for each role and assign only the necessary article actions to that group. The criteria you create in the approval process defines which validation status can be automatically approved and published and which article must be approved and published by a domain expert.

For example, Anne, the KCS Contributor, can create a `Validated External` article, but based on the article actions assigned to her public group, the approval process sends her article to Pat, the KCS Publisher, to be published. Pat, as a KCS Publisher, can publish his own articles without submitting them to a queue.

The following table lists the job functions that each role needs to perform on articles in the organization

Job Function	KCS Reader	KCS Candidate	KCS Contributor	KCS Publisher
Create and publish `Work in Progress`	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish `Not Validated`	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish `Validated Internal`	No	Needs approval	Automatically approved and published	Yes
Create and publish `Validated External`	No	Needs approval	Needs approval	Yes
Update and publish `Work in Progress`	No	No	Automatically approved and published	Yes
Update and publish `Not Validated`	No	No	Automatically approved and published	Yes
Update and publish `Validated Internal`	No	No	Automatically approved and published	Yes
Update and publish `Validated External`	No	No	Needs approval	Yes

Creating Users

To give your knowledge users access to the KCS-related features in Salesforce Knowledge, you need to create user profiles with the appropriate user permissions, and then assign users to these profiles. In addition, you need to specify which users in your company are Salesforce Knowledge users.

For detailed steps on granting user permissions and setting up and assigning users, see Enabling Salesforce Knowledge and Managing Users on page 20.

Enabling KCS Settings

You'll need to configure several KCS-related features on the Knowledge Settings page to enable users to create articles from more places and get articles approved and published more easily.

Before enabling Salesforce Knowledge, you must create at least one article type. For more information on setting up article types, see "Defining Article Types" in the Salesforce Help.

To enable the KCS-related features for your users:

1. From Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings**.
2. Select `Allow users to create and edit articles from the Articles tab`.

   This gives your KCS users the ability to create or update articles from the Articles tab without having to use the Article Management tab.

3. Select `Activate the Validation Status field for articles`.

   When you activate the `Validation Status` field, users can select values to show whether the content of the article has been validated or not.

   Your organization can create custom picklist values that show the state of an article in the article publication lifecycle and can be used as criteria in approval processes to determine which articles a user can publish and which need approval first. Additionally, when doing searches, users can select a validation status and search for articles with that status. In our example, values that appear in the picklist are: `Validated`, `Not Validated`, `Work in Progress`, `Validated Internal`, and `Validated External`.

   See Defining Validation Status Picklist Values for information on adding custom validation statuses to your organization.

4. Select `Allow users to create an article from a case` to let Knowledge users create new articles while working with cases.

   Select the option to let users create articles with the standard editor so that they can use the full functionality of the HTML editor.

Defining Validation Status Picklist Values

USER PERMISSIONS

To create or change validation status picklist values:

- "Customize Application"

  AND

  "Manage Salesforce Knowledge"

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of an article in the article publication lifecycle. In our example, these validation statuses control which types of articles users can publish and which types they need to submit for approval.

For our KCS-enabled organization, we'll create the following picklist values:

- *`Work in Progress`* for draft articles
- *`Validated Internal`* for articles that are validated for internal use only
- *`Validated External`* for articles that are validated for external use

The statuses `Validated` and `Not Validated` are available by default. Since this example doesn't use `Validated`, you can either edit and rename it as one of the statuses you'll use, or delete it.

1. From Setup, enter *`Validation Statuses`* in the `Quick Find` box, then select **Validation Statuses**.
2. On the picklist edit page, click **New** to add new values to the validation status field. You can also edit, delete, reorder, and replace picklist values.
3. Add one or more picklist values (one per line) in the text area.
4. To set the value as the default for the picklist, be sure to select the `Default` checkbox.
5. Click **Save**.

Note: `Validation Status` works in conjunction with Channels. For example, if an article's status is set to *`Published External`* but the customer channel is not selected, it will not be visible externally.

Creating Public Groups

USER PERMISSIONS

To create or edit a public group:

- "Manage Users"

To create or edit another user's personal group:

- "Manage Users"

Salesforce Knowledge uses public groups as a way to assign users to specific functions related to articles. When you assign article actions to a public group, you can grant users in that group the ability to do things like publish articles with a specified validation status. Public groups are also used in approval processes to manage the publishing workflow.

For example, when a member of the KCS Candidate public group submits an article with the status `Work in Progress` for approval, it is automatically approved and published. If the same user submits an article with `Validated Internal` status, it moves to the Publishing External queue to be reviewed before being published.

Use the following steps to create these example public groups for different KCS users:

- KCS Candidate
- KCS Contributor
- KCS Publisher

Remember that KCS Reader users don't belong to a public group since they don't create or publish articles.

1. From Setup, enter *`Public Groups`* in the `Quick Find` box, then select **Public Groups**.
2. Click **New**, or click **Edit** next to the group you want to edit.
3. Enter the following information:

Field	Description
`Label`	The name used to refer to the group in any user interface pages.
`Group Name` (public groups only)	The unique name used by the API and managed packages.
`Grant Access Using Hierarchies` (public groups only)	Select **Grant Access Using Hierarchies** to allow automatic access to records using your role hierarchies. When selected, any records shared with users in this group are also shared with users higher in the hierarchy. Deselect **Grant Access Using Hierarchies** if you're creating a public group with All Internal Users as members, which optimizes performance for sharing records with groups. Note: If **Grant Access Using Hierarchies** is deselected, users that are higher in the role hierarchy don't receive automatic access. However, some users—such as those with the "View All" and "Modify All" object permissions and the "View All Data" and "Modify All Data" system permissions—can still access records they don't own.
`Search`	From the `Search` drop-down list, select the type of member to add. If you don't see the member you want to add, enter keywords in the search box and click **Find**. Note: For account owners to see child records owned by high-volume portal users, they must be members of any portal share groups with access to the portal users' data.
`Selected Members`	Select members from the Available Members box, and click **Add** to add them to the group.
`Selected Delegated Groups`	In this list, specify any delegated administration groups whose members can add or remove members from this public group. Select groups from the Available Delegated Groups box, and then click **Add**. This list appears only in public groups.

4. Click **Save**.

Note: When you edit groups, sharing rules are usually automatically reevaluated to add or remove access as needed. If these changes affect too many records at once, a message appears warning that the sharing rules won't be automatically reevaluated, and you must manually recalculate them.

Assign Article Actions to Public Groups

USER PERMISSIONS

To create public groups and assign them to article actions:

- "Customize Application"

  AND

  "Manage Users"

  AND

  "Manage Salesforce Knowledge"

After you've created public groups for candidates, contributors, and publishers, you'll need to assign article actions to those groups.

Article actions allow users to participate in the article publishing process. By default, all article actions are assigned to users with the "Manage Articles" user permission, and users can complete an action as long as they have the correct article type permission. You can control article action access by assigning public groups to article actions and adding users who need to perform those actions to the relevant public groups. To further restrict actions like publishing, you can create approval processes that allow users to publish only those articles that have specific validation statuses. For example, a contributor can publish a `Work in Progress` article, but the approval process for that role might require that articles with `Validated Internal` status be sent for approval before they're published.

Note: Although you can add any user to a public group, only users with the "Manage Articles" user permission and the appropriate object permissions can perform article actions.

To assign article actions to public groups:

1. From Setup, enter *`Knowledge Article Actions`* in the `Quick Find` box, then select **Knowledge Article Actions**.
2. Click **Edit**.
3. For the action you want to assign, select the appropriate radio button and choose a public group.

   If you don't modify an article action, all users with the "Manage Articles" permission can perform that action. The following table shows the article actions with their public group assignments:

Article Action	Public Group
Publish Articles	KCS Publisher
Archive Articles	KCS Candidate, KCS Contributor, KCS Publisher
Edit Published and Archived Articles	KCS Contributor, KCS Publisher
Delete Articles	KCS Publisher

4. Click **OK** and then click **Save**.

Creating and Activating Knowledge Actions

EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

USER PERMISSIONS

To enable Salesforce Knowledge Actions:

- "Customize Application"

Knowledge actions are templates that link a workflow action to an article type.

When knowledge actions are enabled, you can use them to link article types to specific workflow article actions, such as publishing. For example, if you want to have each FAQ published as a new version each time it completes the approval process, you can create a knowledge action that links the FAQ article type to the `Publish as New` action. Then, when you create an approval process for FAQs, select the new Knowledge Action.

Note: When you create the approval process, make sure to change the final approval action to `Unlock the record for editing` to let users publish the article.

To maximize memory usage when publishing large groups of articles, Salesforce may delay publication and adds the articles to the publication queue. This happens when the number of articles and translations multiplied by the number of rich text areas is greater than 100. You can view the publishing queue to check the status of the articles on the Automated Process Actions page.

1. From Setup, enter *`Knowledge Action`* in the `Quick Find` box, then select **Knowledge Action**.
2. Click **New Knowledge Action**.
3. Select the article type for the action. The workflow rules and approval process that you associate with the action must belong to the same article type.
4. Enter a unique name for the knowledge action.
5. Select the type of action you want to apply to the article type. For example, `Publish as New` publishes the article as a new version.
6. Enter a description.
7. Click **Save**.
   The Knowledge Action detail page appears showing you the rules and approval processes that use the knowledge action.
8. When you're ready to use the knowledge action in an approval or workflow process, click **Activate** on the Knowledge Action detail page.

Creating Approval and Publishing Queues

Depending on the validation status of an article, candidates and contributors must have some or all of the articles they create reviewed and approved before they can be published. To get articles reviewed, approved, and published quickly, authors submit articles to a queue. In this example, we need to create the Publishing External queue that both candidates and contributors use to submit articles for approval.

USER PERMISSIONS

To create or change queues:
- "Customize Application"

  AND

  "Manage Public List Views"

To change queues created by other users:
- "Customize Application"

  AND

  "Manage Public List Views" and "Manage Users"

1. From Setup, enter *Queues* in the `Quick Find` box, then select **Queues**.
2. Click **New**.
3. Enter the `Label` and `Queue Name`.

   For our example, use "Publishing External" for the `Label` and "Publishing_External" for the `Queue Name`.
4. Choose email notification settings for the queue:

To Notify	You Must
One email address when new records are placed in the queue	Add an email address to `Queue Email`. You can add an email address for an individual user or an email distribution list.
All queue members individually when new records are placed in the queue	Leave `Queue Email` blank.
All queue members and the `Queue Email` individually when new records are placed in the queue	Add an email address to `Queue Email` and check `Send Email to Members`.

5. Add `Knowledge Article Version` as the object available to the queue.
6. Choose the queue members.

   You can select users, roles, or public groups. Only queue members and users above them in the role hierarchy can take ownership of records in the queue, depending on your organization's sharing settings.
7. Click **Save**.

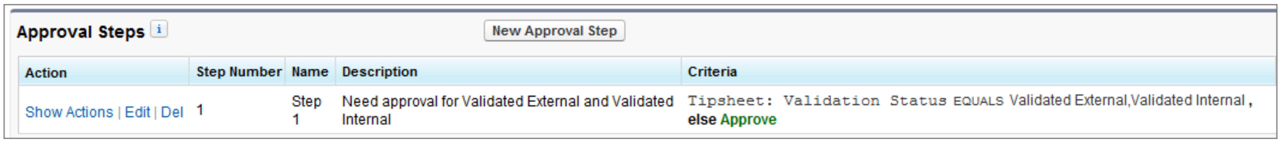
KCS Approval Processes and Article Actions

Ensuring that the content in your articles is accurate and helpful is foundational to getting accurate information to those who need it most. Creating processes where Knowledge experts review, validate, and approve articles for publication is critical to creating a trustworthy knowledge base. Implementing approval processes with Salesforce Knowledge gives you additional control over the content and publication of your articles.

When an approval process is associated with an article type, users with the "Manage Articles" permission might see both the **Publish...** and **Submit for Approval** buttons from an article's detail page. (Which buttons they see is determined by both permissions and article actions). These users can publish an article without submitting it for approval. To limit this ability to certain users, assign the "Publish Articles" article action to a select group of users instead of giving it to all users with the "Manage Articles" permission.

The ability to publish articles without prior approval is governed by an approval process that is specific to each user's public group. For example, create an approval process for each group of users who need approval for at least one type of validation status:

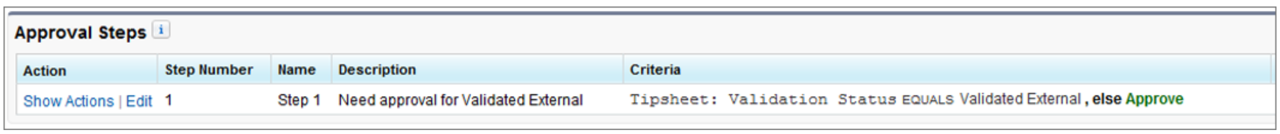
- For KCS Candidates, set criteria to let them approve and publish the article unless the validation status is set to `Validated Internal` or `Validated External` (`Valdiation Status EQUALS Validated External, Validated Internal, else Approve`). When approval is necessary, assign the article to the Publishing External queue.



Approval Steps New Approval Step

Action	Step Number	Name	Description	Criteria
Show Actions | Edit | Del	1	Step 1	Need approval for Validated External and Validated Internal	Tipsheet: Validation Status EQUALS Validated External,Validated Internal , else Approve

- For KCS Contributors, set criteria to let them approve the article unless the validation status is set to `Validated External` (`Valdiation Status EQUALS Validated External, else Approve`). When approval is necessary, assign the article to the Publishing External queue.



Approval Steps

Action	Step Number	Name	Description	Criteria
Show Actions | Edit	1	Step 1	Need approval for Validated External	Tipsheet: Validation Status EQUALS Validated External , else Approve

Using this workflow criteria, Amber, a KCS Candidate, can publish `Work in Progress` articles but not `Validation Internal` or `Validation External` articles. Anne, as a KCS Contributor, can publish articles with the status of `Not Validated`, but doesn't have permission to publish `Validated External` articles.

For information on setting up approval processes, refer to Creating Workflow Rules and Approval Processes on page 26.

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