

# Edit, Preview, and Publish Knowledge Articles

Last Modified on 06/14/2021 4:37 pm EDT

UGR, MBA, and WEMBA **Knowledge Users** can publish and edit Knowledge Articles that will appear in the Support section of MyWharton Community.

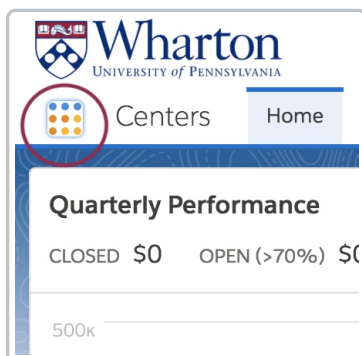
## Before You Start

- You must have Knowledge User privileges in order to publish knowledge articles.

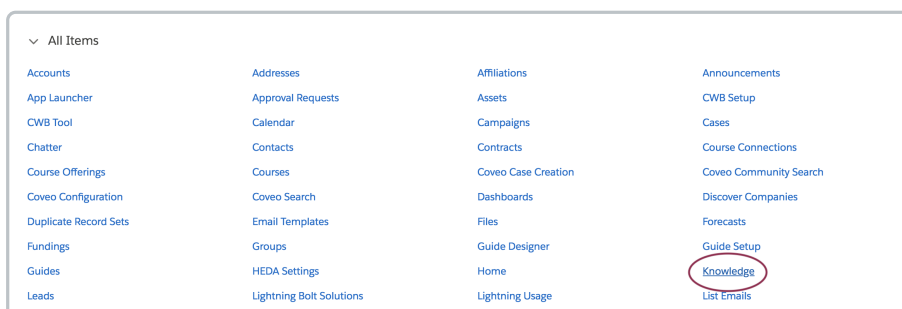
## Publishing Knowledge Articles

To publish a Knowledge Article:

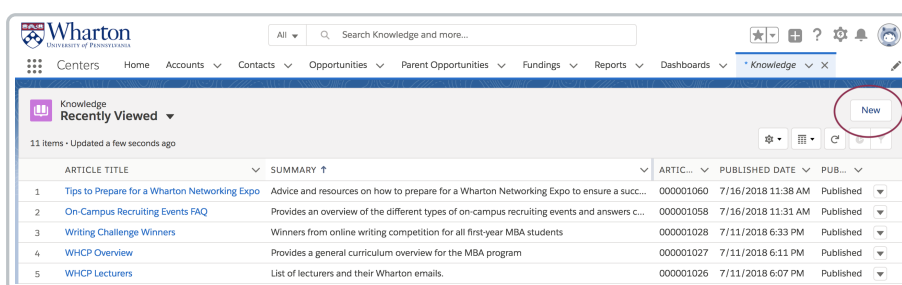
1. Log in to **Salesforce** (<https://wharton-hub.my.salesforce.com/>) and click the **app launcher** in the top left-hand corner under the Wharton logo.



2. Scroll down and under **All Items** click **Knowledge**.



3. Click **New** to create a new Knowledge Article.



4. Give the article a **Title** and enter the information for the article into the applicable fields.  
**IMPORTANT:** Make sure **Visible to Customer** is checked; otherwise students won't be able to see the article in MyWharton Community.

5. Click **Save**.

The screenshot shows the 'New Knowledge' form. The 'Visible to Customer' checkbox is checked and highlighted with a red arrow. The form includes fields for Title, URL Name, Summary, and a Rich Text Area. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

6. Click on **Categories** on the right side of the screen and click **Edit**.

The screenshot shows the 'Categories (0)' section. A red circle highlights the 'Expand All' dropdown menu, which has an 'Edit' button visible below it.

7. Assign a **Category** or **Multiple Categories** to the article and click **Save**.

**IMPORTANT:** If you don't select a student type in the Categories section, your Knowledge Article will be published to **ALL STUDENTS**. Be sure to select a student type if you are only publishing to a specific audience.

The screenshot shows the 'Edit Article Categories' form. The 'Students' category is expanded, and 'MBA' is selected. The 'Selected Categories' list shows 'NextGen Spike (2)' and 'Students (1)'. At the bottom are 'Cancel' and 'Save' buttons.

8. In the upper right-hand corner, select **Publish** to publish the Knowledge Article.

**Knowledge**  
**Communication Fellows Brochure**

Article Number: 000001012 | Publication Status: Draft | Last Modified Date: 7/11/2018 5:11 PM | Version Number: 0

**Publish** **Assign**

**DETAILS** | RELATED | VERSIONS

**Information**

Title: Communication Fellows Brochure

Visible to Customer: ☒

URL Name: Communication-Fellows-Brochure

Summary: Information about the TA program, how it started, how you get involved with it.

Rich Text Area: The Wharton Communication Fellows Program

Was this article helpful?  
👍 0 👎 0

Categories (3) **Expand All**

- > NextGen Spike (2)
- > Students (1)

9. Select **Publish Now** or **Schedule Publication** to publish it at a specific time.

Publish My article

⚠️ Any assignment details will be removed.

☒ Publish Now

☐ Schedule publication on:

**Cancel** **Publish**

10. Change List View to **Published Articles** and **verify** that your Knowledge Article was published.

**Knowledge**  
**Published Articles**

50+ Items • Sorted by Article Title • Filtered by all knowledge - Language, Publication Status • Updated a few seconds ago

ARTICLE TITLE ↑	SUMMARY	MODIFIED DATE	ARTIC...	VI...
1 2401 How-Tos	Describes how to access 2041 Walnut Street	7/11/2018 3:49 PM	000001008	✓
2 2401 Walnut Policies	Policies of 2401 Walnut building.	7/11/2018 3:56 PM	000001018	✓
3 360 Assessment Tutorial	Instructions and FAQs for completing the Wharton Leadership Competency 360 Assessment through Qu...	7/11/2018 3:37 PM	000001006	✓
4 Academic Forms	Forms that you may need throughout your MBA journey.	7/12/2018 3:18 PM	000001029	✓
5 Academic Resources	Please refer to the following pages for important resources you may find useful during your time here at ...	7/12/2018 3:58 PM	000001040	✓
6 Admissions Fellows		7/11/2018 4:09 PM	000001017	✓
7 Capital IQ Usage Policy	S&P Capital IQ is a web-based information platform that can enhance your interview preparation and he...	7/12/2018 9:23 AM	000001009	✓
8 Career Fellows Program Information	Learn about the MBACM Career Fellows program and how to apply. The program is open to second year ...	7/11/2018 5:32 AM	000001005	✓
9 Career Treks	This quick reference sheet shows how to complete basic tasks in JobTrek, a digital tool to help organize ...	7/11/2018 3:57 PM	000001015	✓
10 CareerPath Application Process FAQ	This knowledge article will answer common questions on finding and applying for jobs in CareerPath.	7/11/2018 4:28 PM	000001022	✓

## Editing Knowledge Articles

To edit a Knowledge Article:

1. If you want to edit your article *after it has been published*, click on the **Article Title** in the **Published Articles List** and choose **Edit as Draft**.

**Community** | Home | Chatter | Contacts | Accounts | Reports | Dashboards | **Knowledge**

**Knowledge**  
**Visit a Partner School's Career Management Office**

Article Number: 000001056 | Publication Status: Published | Last Modified Date: 7/31/2018 1:52 PM | Version Number: 2

**Edit as Draft** **Archive**

**DETAILS** | RELATED | VERSIONS

**Information**

Title: Visit a Partner School's Career Management Office

URL Name: Visit-a-Partner-School-s-Career-Management-Office

Summary: Overview of MBA Career Management's partner school "reciprocity" program through which Wharton students can visit another school's career office to use their on-site job search resources.

Article Details

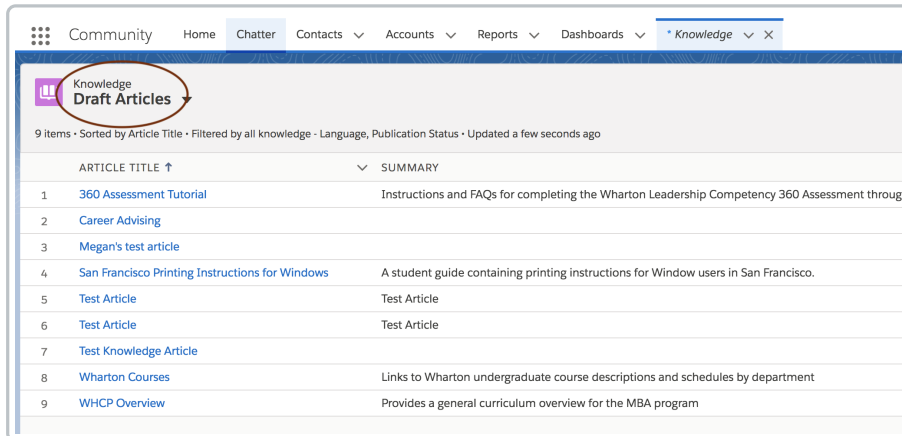
Was this article helpful?  
👍 0 👎 0

Categories (3) **Expand All**

- > NextGen Spike (2)
- > Students (1)

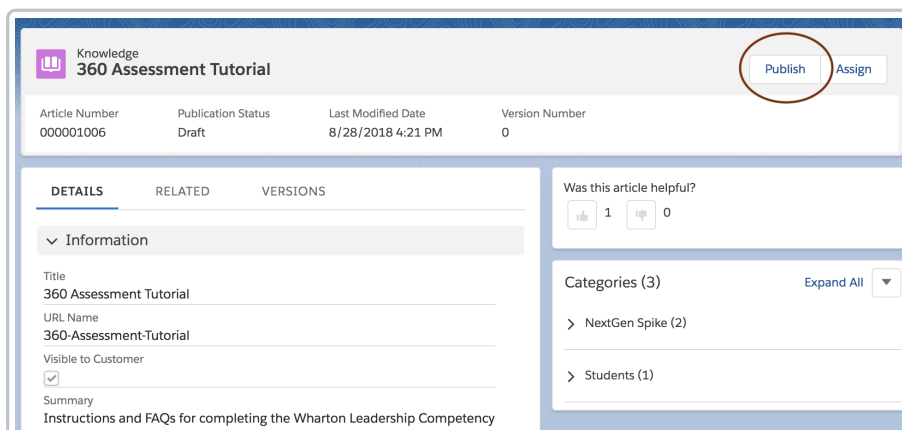
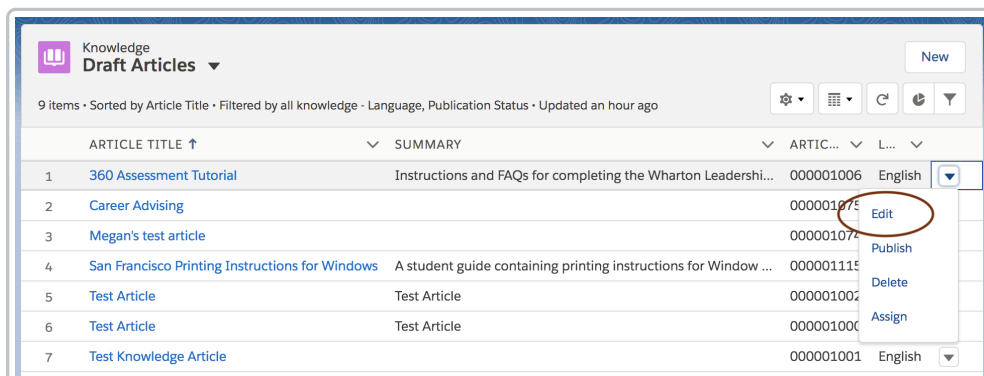
2. If you want to edit your article *before it has been published*, while it is still in the draft phase, make sure you are

in the **Draft Articles List** view by choosing **Draft Articles** from the drop-down menu.



3. Click on the **triangle** next to the right of the article that you want to change and click **Edit**.

**Note:** If you click on the Article Title for a Draft Article, you will only see an option to Publish. You could Publish the article and then Edit it again if you want, but if you're not ready to publish click on the triangle and choose **Edit** instead. Remember to **Publish** the changes when you are ready.



## Editing Topics on Knowledge Articles

If you only need to edit the topics on your knowledge article, you can do this from the Community Workspaces dashboard without having to log in to Salesforce Set up. Changes made in Community workspaces will be reflected both in the Community and in Salesforce Setup.

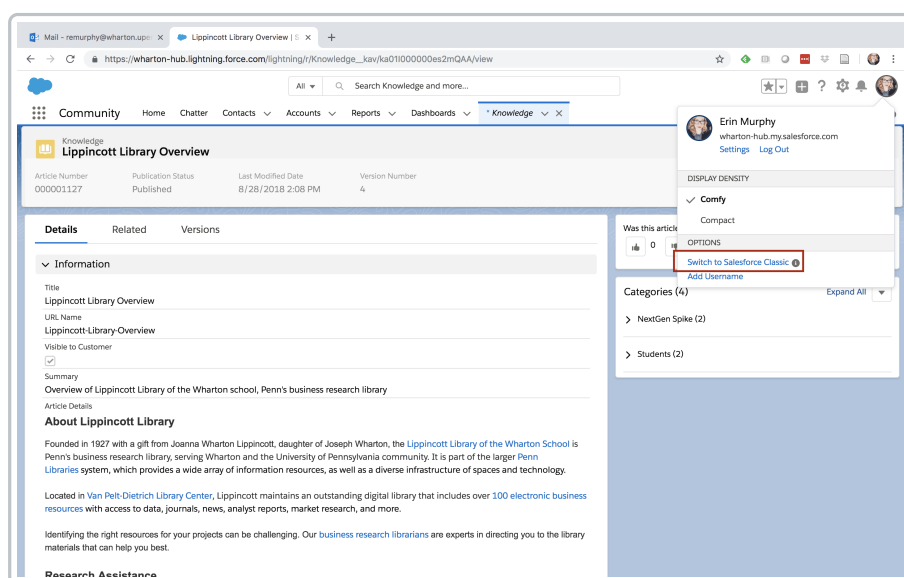
1. From the Community, click on **your icon** in the upper-right hand corner and choose **Community Workspaces**.
2. Click on the **Content Management** tile under **My Workspaces**.

3. Click **Topics** from the menu across the top of the page, and then click **Article Management** from the menu on the left-hand side of the page.
4. Use the search bar to find your knowledge article, or scroll through the list.
5. Click on **your knowledge article title** to open it.
6. Add or remove topics as needed and click **save**. Changes will be reflected immediately in the Community.

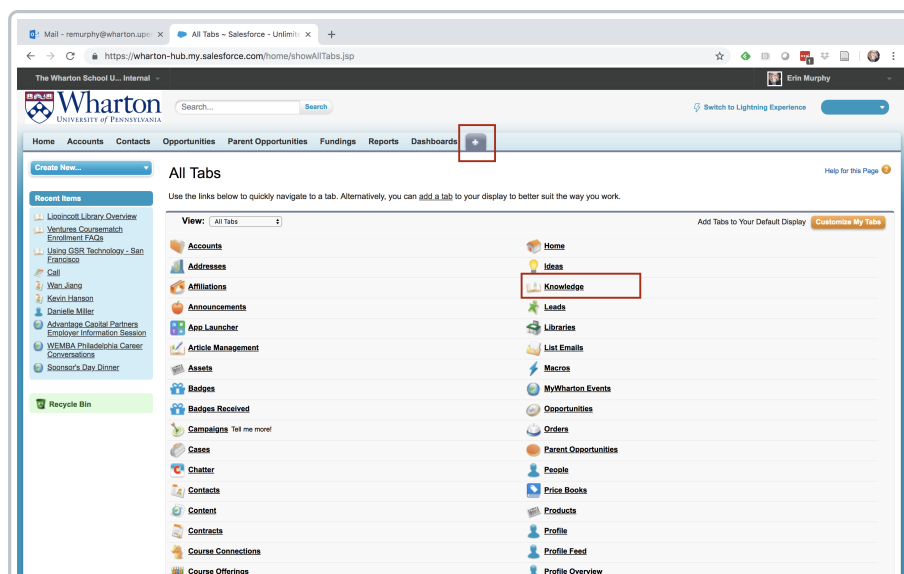
## Previewing Knowledge Articles

If you want to preview your knowledge article before you publish it, you can switch to Salesforce Classic (the old version of Salesforce before the platform upgraded to Salesforce Lightning):

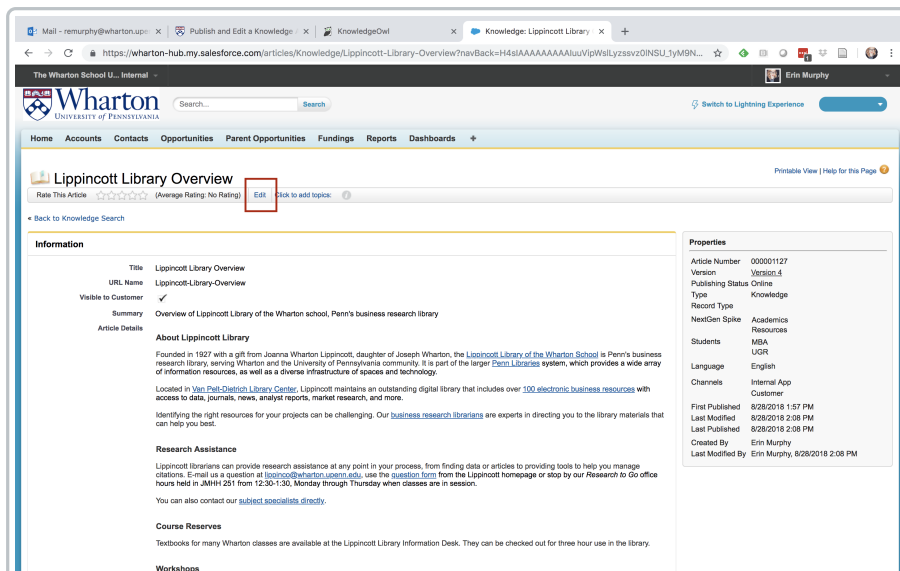
1. Click on your icon in the upper-right hand corner of Salesforce Lightning and then choose **Switch to Salesforce Classic**.



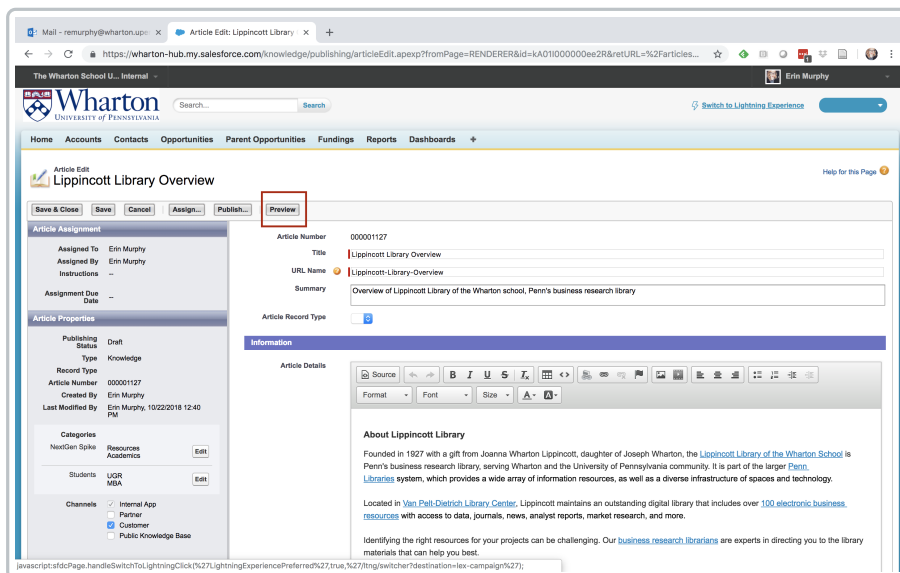
2. Once you are in Salesforce Classic, click the **+ sign** to open up a list of all of the available links and choose **Knowledge**.



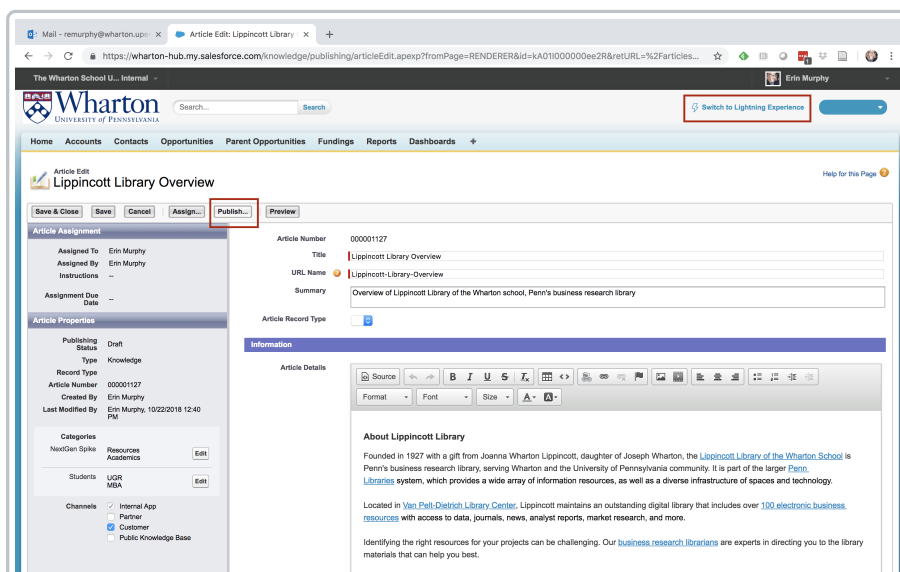
3. Once you are in Knowledge, click on an **article title** and then choose **Edit**.



4. When you are in the Editing window, you can click **Preview** to view any stylistic changes to the articles.



5. Exit out of the preview once you are finished and you can click **Publish** or you can switch back to **Salesforce Lightning** and publish from there.



# Questions?

Contact: MyWharton Support

Email: [mywharton-support@wharton.upenn.edu](mailto:mywharton-support@wharton.upenn.edu)

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