# 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.

∽ All Items				
Accounts	Addresses	Affiliations	Announcements	
App Launcher	Approval Requests	Assets	CWB Setup	
CWB Tool	Calendar	Campaigns	Cases	
Chatter	Contacts	Contracts	Course Connections	
Course Offerings	Courses	Coveo Case Creation	Coveo Community Search	
Coveo Configuration	Coveo Search	Dashboards	Discover Companies	
Duplicate Record Sets	Email Templates	Files	Forecasts	
Fundings	Groups	Guide Designer	Guide Setup	
Guides	HEDA Settings	Home	Knowledge	
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3. Click New to create a new Knowledge Article.

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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.

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

Categories (0)	Expand All
	Edit

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.

CATEGORIES	xpand All SELECTED CATEGORIES
Q     Search Categories       Financial Aid       >       >       Advising       >       >       Opportunities	V NextGen Spike (2)     Courses     Curriculum     Students (1)
<ul> <li>✓ Students</li> <li>✓ MBA</li> </ul>	MBA
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8. In the upper right-hand corner, select **Publish** to publish the Knowledge Article.

Commun	ication Fellows Bro	chure			Publish Assign
Article Number 000001012	Publication Status Draft	Last Modified Date 7/11/2018 5:11 PM	Version Number 0		
DETAILS		SIONS		Was this article helpful?	
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	t the TA program, how it s	started, how you get involved	l with it.		
Rich Text Area The Wharton	Communication Fel	lows Program			

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.

ш	Published Articles					New
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	2401 Walnut Policies	Policies of 2401 Walnut building.	7/11/2018 3:56 PM	000001018	1	
	360 Assessment Tutorial	Instructions and FAQs for completing the Wharton Leadership Competency 360 Assessment through Qu	7/11/2018 3:37 PM	000001006	1	
	Academic Forms	Forms that you may need throughout your MBA journey.	7/12/2018 3:18 PM	000001029	1	
	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	1	
	Admissions Fellows		7/11/2018 4:09 PM	000001017	1	
	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	~	
	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	~	
	Career Treks	This quick reference sheet shows how to complete basic tasks in JobTreks, a digital tool to help organize	7/11/2018 3:57 PM	000001015	1	
0	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 V Accounts V Reports V Dashboards V Knowledge V X	(
Usit a Partner School's Career Management Office	Edit as Draft Archive
Article Number         Publication Status         Last Modified Date         Version Number           000000056         Published         7/31/2018 1:52 PM         2	
DETAILS RELATED VERSIONS	Was this article helpful?
Title Visit a Partner School's Career Management Office	Categories (3) Expand All
URL Name Visit-a-Partner-School-s-Career-Management-Office	> NextGen Spike (2)
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.	> Students (1)
Article Details	

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.

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1	360 Assessment	Tutorial		Instruction	s and FAQs for o	completing the Wha	rton Leader	ship Competenc	y 360 Assessment through
2	Career Advising								
3	Megan's test arti	cle							
4	San Francisco Pr	inting Instructio	ns for Windows	A student g	guide containing	printing instruction	ns for Windo	w users in San Fi	rancisco.
5	Test Article			Test Article					
6	Test Article			Test Article					
7	Test Knowledge	Article							
8	Wharton Course	s		Links to Wh	narton undergra	duate course descri	ptions and s	chedules by dep	artment
9	WHCP Overview			Provides a	general curricul	um overview for the	MBA progra	m	

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.

	Knowledge Draft Articles ▼							Ne
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### **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**.

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Located in Van Pelt-Dietrich Library Center, Lippincott maintains an outstanding digital library that includes over 100 electronic business resources with access to data, journals, news, analyst reports, market research, and more.	
identifying the right resources for your projects can be challenging. Our business research librarians are experts in directing you to the library materials that can help you best.	
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2. Once you are in Salesforce Classic, click the **+ sign** to open up a list of all of the available links and choose **Knowledge**.

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

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Summary	Overview of Lippincott Library of the Wharton school, Penn's business research library	Record Type NextGen Spike Academics			
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	research library, serving Wharton and the University of Pennsylvania community. It is part of the larger Penn Libraries system, which provides a wide array of information resources, as well as a diverse infrastructure of spaces and technology.	Language English			
	Located in Van Pell-Dietrich Library Center, Lippincott maintains an outstanding digital library that includes over 100 electronic business resources with	Channels Internal App Customer			
	access to data, journals, news, analyst reports, market research, and more.	First Published 8/28/2018 1:57 PM			
	Identifying the right resources for your projects can be challenging. Our business research librarians are experts in directing you to the library materials that can help you best.	Last Modified 8/28/2018 2:08 PM Last Published 8/28/2018 2:08 PM			
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	You can also contact our subject specialists directly.				
	Course Reserves				
	Textbooks for many Wharton classes are available at the Lippincott Library Information Desk. They can be checked out for three hour use in the library.				
	Workshops				

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

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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.

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Instructions	-	URL Name 🥥 Lippincott-Library-Overview					
Assignment Due Date	-	Summary Overview of Lippincott Library of the Wharton school, Penn's business research library					
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Publishing Status	Draft	Information					
Type	Knowledge						
Record Type	-	Article Details					
Article Number	000001127						
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	Partner     Customer	resources with access to data, journals, news, analyst reports, market research, and more.					
	Public Knowledge Base	Identifying the right resources for your projects can be challenging. Our business research librarians are experts in directing you to the library					
		materials that can help you best.					

# Questions?

Contact: MyWharton Support

Email: mywharton-support@wharton.upenn.edu