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.
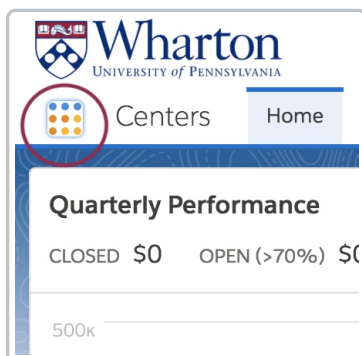
> **Before You Start**
>
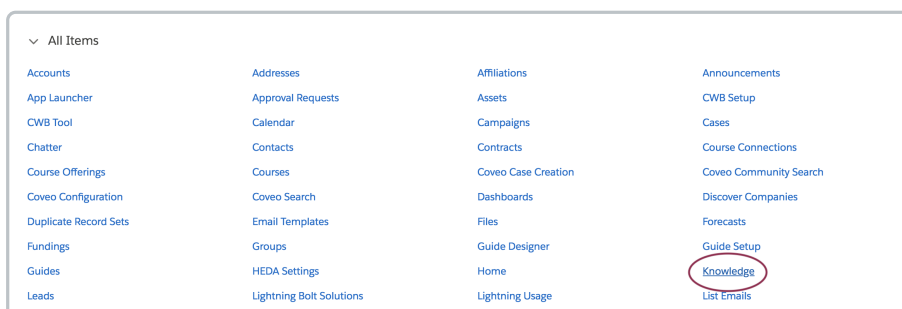> - You must have Knowledge User privileges in order to publish knowledge articles.

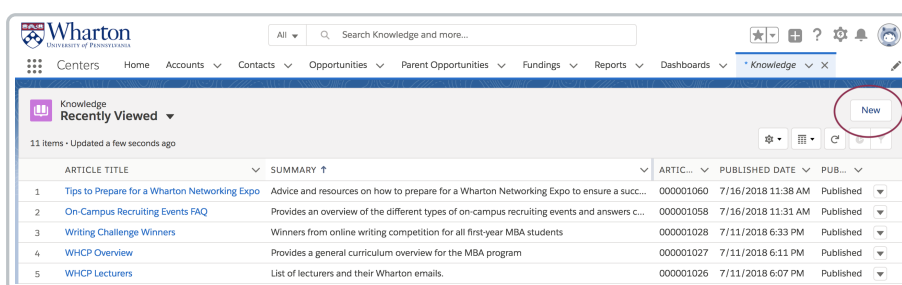## Publishing Knowledge Articles

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**.

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

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

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

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

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**.

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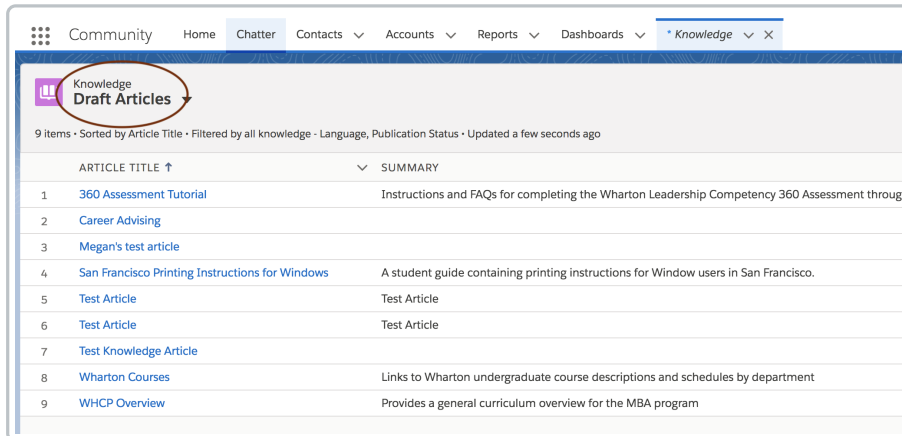
3. Click on the **triangle** next to the right of the article that you want to change and click **Edit**.
   Note: If you click on the Article Title for a Draft Article, you will only see an option to Publish. You could Publish the article and then Edit it again if you want, but if you're not ready to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

Editing Topics on Knowledge Articles

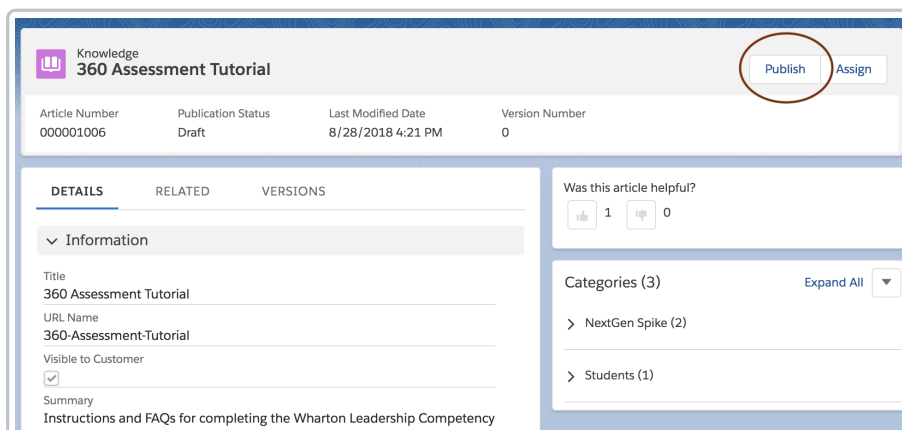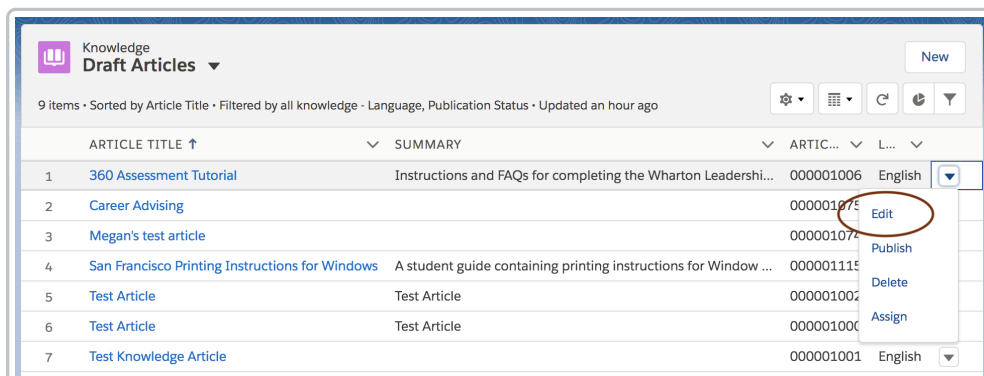If you only need to edit the topics on your knowledge article, you can do this from the Community Workspaces dashboard without having to log in to Salesforce Set up. Changes made in Community workspaces will be reflected both in the Community and in Salesforce Setup.

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.
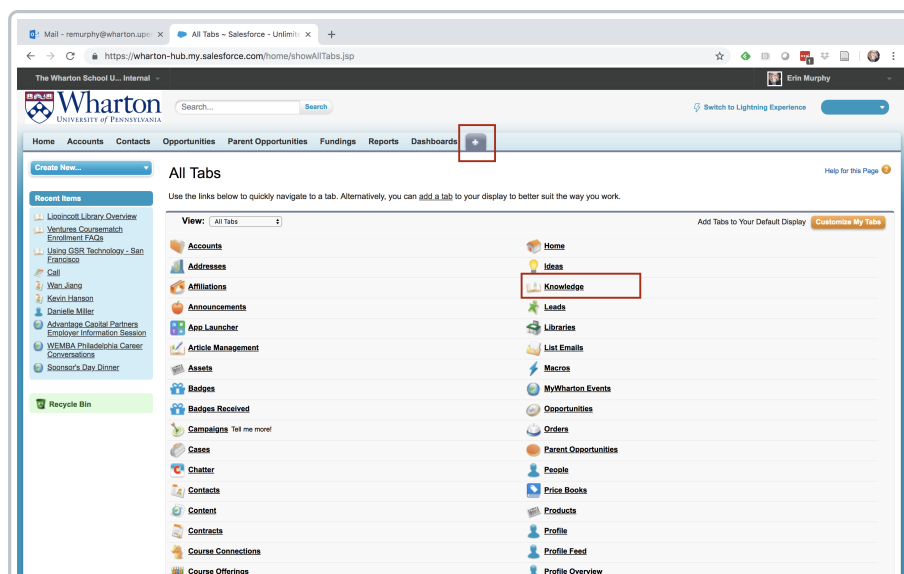
Previewing Knowledge Articles

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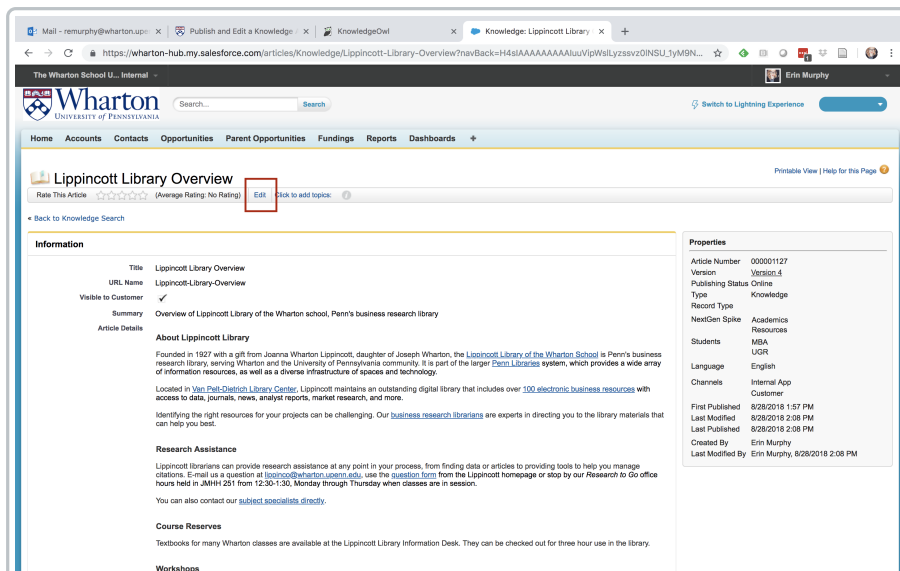
1. Click on your icon in the upper-right hand corner of Salesforce Lightning and then choose **Switch to Salesforce Classic**.
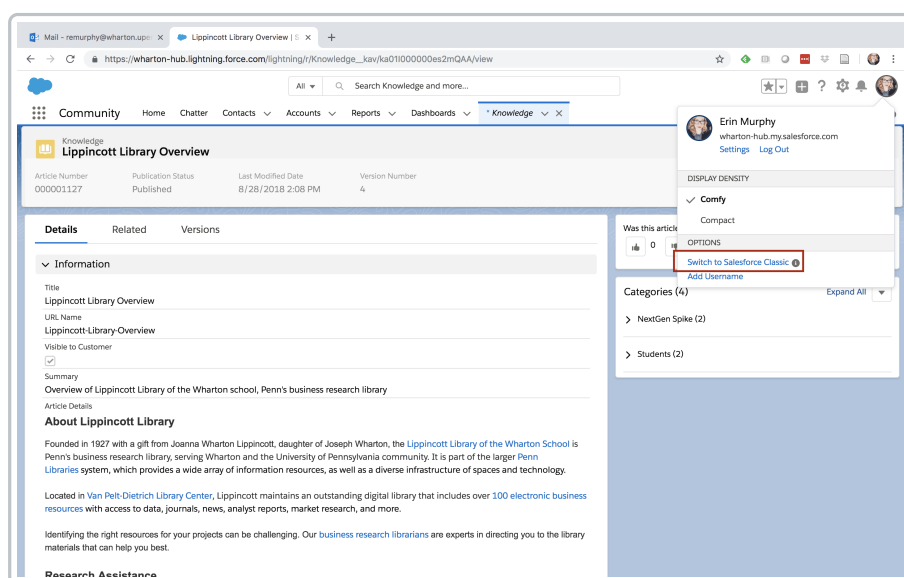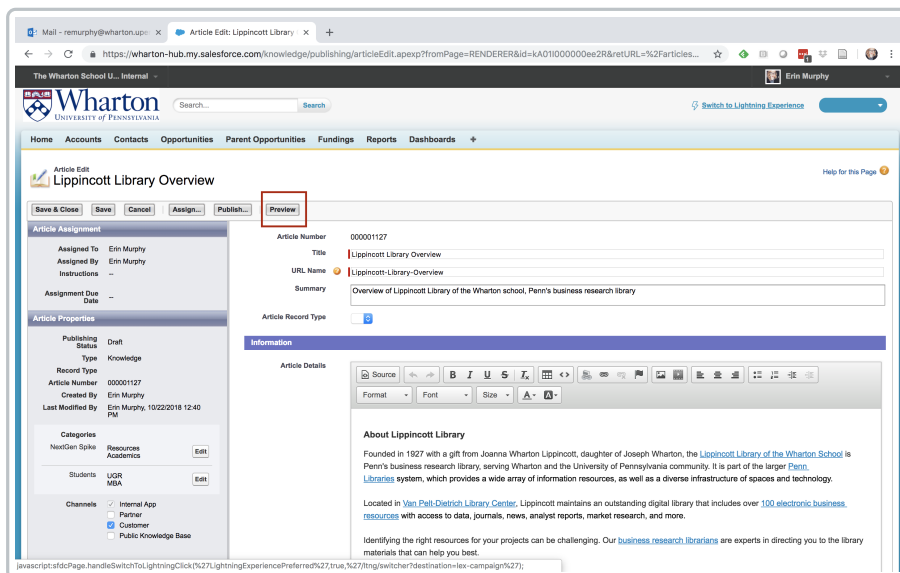

2. Once you are in Salesforce Classic, click the **+ sign** to open up a list of all of the available links and choose **Knowledge**.
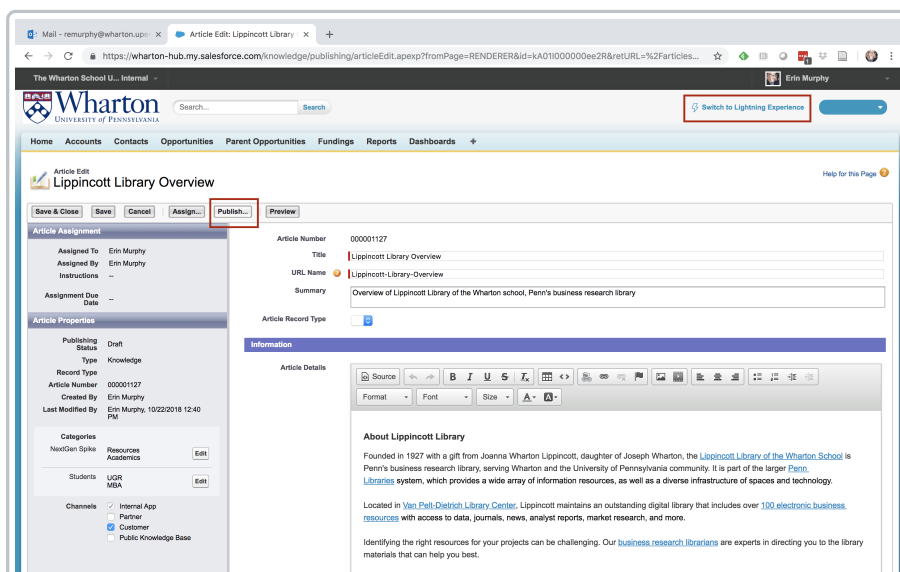

3. Once you are in Knowledge, click on an **article title** and then choose **Edit**.

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