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# Lightning Knowledge Guide

Salesforce, Spring '18





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# SET UP AND MANAGE YOUR SALESFORCE KNOWLEDGE BASE

Give your website visitors, clients, partners, and service agents the ultimate support tool. Salesforce Knowledge lets you create and manage a knowledge base with your company information and securely share it when and where it's needed.

Your Salesforce Knowledge base is built from knowledge articles, which are documents of information. Articles can include information on process, like how to reset your product to its defaults, or frequently asked questions, like how much storage your product supports.

Experienced service agents and internal writers write the articles. The articles are then published to a range of channels: Internal App, customer and partner communities, or public websites. Where and what information is published is based on the article layout profile and the field level security.

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Lightning Knowledge, which is Generally Available, is recommended for orgs new to Knowledge, or for existing orgs that can easily consolidate to one article type.

 **Note:** Enabling Lightning Knowledge changes your Org's Data Model to use Record Types rather than Article Types. Orgs with multiple articles types require data migration to consolidate article types before enabling Lightning Knowledge.

Important: After you enable Lightning Knowledge, you can't disable it. Test in a Sandbox or Trial org before enabling in production.

## [Salesforce Knowledge Documentation Overview](#)

Find the information you need about Salesforce Knowledge.

## [Compare Salesforce Knowledge in Salesforce Classic and Lightning Experience](#)

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Compare Lightning Knowledge with Classic Knowledge and decide if you're ready to enable Lightning Knowledge in your org.

## [Lightning Knowledge Limitations](#)

Keep these limitations in mind when making the switch to Lightning Knowledge.

## [Set up Lightning Knowledge](#)

Enable Lightning Knowledge, create Knowledge record types, customize your record type page layouts, set access for Knowledge users, and create a Lightning Knowledge process.

## [Use Your Lightning Knowledge Base](#)

Search articles, author and manage articles, use the Knowledge sidebar in the Lightning Service Console, and create Knowledge reports.

## [Define Data Categories for Your Lightning Knowledge Articles](#)

Create data categories and data category groups to help Knowledge users and customers find what they need. Some data category information doesn't apply to Lightning Knowledge.

## SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

## EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

# Salesforce Knowledge Documentation Overview

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Find the information you need about Salesforce Knowledge.

## Overview of Salesforce Knowledge

- [Set Up and Manage Your Salesforce Knowledge Base](#)
- [Plan Your Knowledge Base](#)
- [Work with Articles and Translations](#)
- [Salesforce Knowledge Guide](#)

## Classic Knowledge

### Set up Classic Knowledge

- [Build Your Knowledge Base](#)
- [Knowledge Article Types](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Knowledge User Access](#)
- [Workflow and Approvals for Articles](#)

### Use Your Salesforce Knowledge Base in Salesforce Classic

- [Search Articles and External Sources on the Knowledge Tab](#)
  - [Find Knowledge Articles in a Salesforce Console in Salesforce Classic](#)
  - [How Does Search Work?](#)
  - [Articles or Knowledge Tab](#)
  - For searching and viewing Salesforce Knowledge Articles on your Android device, see [Access Salesforce Knowledge Articles with Salesforce for Android \(Beta\)](#) and [Salesforce App Differences from the Full Salesforce Site](#)
- [Create and Edit Articles](#)
- [Publish Articles and Translations](#)
- [Report on Salesforce Knowledge Articles](#)

### Translate Salesforce Knowledge Articles

- [Support a Multilingual Knowledge Base](#)
- [Translate Articles Within Salesforce Knowledge](#)
- [Export Articles for Translation](#)
- [Import Translated Articles](#)

## Lightning Knowledge

### Set up Lightning Knowledge

- [Enable Lightning Knowledge](#)
- [Set up Lightning Knowledge](#)
- [Create Lightning Knowledge Record Types](#)

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- [Create Lightning Knowledge Home](#) on page 10
- [Set Access for Lightning Knowledge](#) on page 11

### Use Your Salesforce Knowledge Base in Lightning Experience

- [Authoring Actions in Lightning Knowledge](#) on page 18
- [Search Articles in the Main Search Box and the Knowledge Sidebar](#) on page 17
- [Use the Knowledge Sidebar in the Lightning Service Console](#) on page 19

## Trailhead

- [Knowledge Basics](#)

## Define Data Categories for Your Salesforce Knowledge Articles

- [Data Categories in Salesforce.com](#)
- [Create and Modify Category Groups](#)
- [Add Data Categories to Category Groups](#)

## Share Your Salesforce Knowledge Base

- [Find, Attach, and Email Articles with the Case Feed Articles Tool](#) (Classic)
- [Enable Salesforce Knowledge in Your Community](#) (Classic)
- [Use Knowledge with Live Agent](#) (Classic)
- If you want visitors to your public 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](#).

## Knowledge and the Salesforce App

- [What's Available in Each Version of the Salesforce App](#)
- [Customer Service Features: What's Not Available in the Salesforce App](#)

## Develop with Salesforce Knowledge

- The [Salesforce Knowledge Developers Guide](#) has Salesforce Knowledge specific development information along with tutorials and examples.
- The [REST API Developer Guide](#) has information on supporting articles with the REST API.
- The [SOAP API Developer Guide](#) has information on the Salesforce Knowledge API:
  - [Guidelines](#)
  - [Objects](#)
  - [Calls](#)
- The [Metadata API Developers Guide](#) has information on Salesforce Knowledge Metadata API objects.
- The [Visualforce Developers Guide](#) has information on Salesforce Knowledge Visualforce components.

- The [Lightning Platform Apex Code Developers Guide](#) has information on the Apex KnowledgeArticleVersionStandardController Class.

## Compare Salesforce Knowledge in Salesforce Classic and Lightning Experience

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Compare Lightning Knowledge with Classic Knowledge and decide if you're ready to enable Lightning Knowledge in your org.

Lightning Knowledge has changed the way Knowledge works in Salesforce. For example, standard record types replace article types, and the Knowledge sidebar for Lightning Service Console replaces Knowledge One for the Service Console in Salesforce Classic.

Lightning Knowledge works differently than Classic Knowledge, but currently has limitations. Let's compare Knowledge in Salesforce Classic and Lightning Experience.

Feature	Classic Knowledge	Lightning Knowledge
Setup	Salesforce Classic Setup	Lightning Knowledge Setup
Types of articles	Article Types	Standard Record Types
Languages	Multiple Languages mode and translation available	Search and read translated articles
Use Knowledge in the console	Add Knowledge One to the Service Console	Add the Lightning Knowledge component via the Lightning App Builder
Page layouts	Fields only, per article type and user profile	Fields, actions, and related lists, per record type and user profile
Record home (articles)	Custom record home	Default Record Home and Record Home that is configurable via the Lightning App Builder
Object home	Knowledge One and Article Management tab	Knowledge home page with list views
Access and permissions	CRUD, profile permissions, page layouts, and custom article actions per public group	CRUD, profile permissions, and page layouts
Files	Files are attached in custom file fields	Files are stored in the standard Files Object and attached in the files related list

### EDITIONS

Available in: Salesforce Classic, Lightning Experience



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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.



## Lightning Knowledge Limitations

Keep these limitations in mind when making the switch to Lightning Knowledge.

-  **Note:** Enabling Lightning Knowledge changes your org's data model to use record types rather than article types. Orgs with multiple article types require data migration to consolidate article types before enabling Lightning Knowledge.
-  **Note:** After you enable Lightning Knowledge, you can't disable it. Test in a sandbox or trial org before enabling it in production.

### Important considerations before enabling Lightning Knowledge

- You can have only one article type when enabling Lightning Knowledge. Currently, no migration tools can help with merging your article types. To enable Lightning Knowledge, migrate your articles to one article type and disable or delete your other article types, or wait until migration tools are available to enable Lightning Knowledge.
- Submit for Translation action is not available in Lightning Knowledge. (You can still do this in Salesforce Classic when Lightning Knowledge is enabled.)
- Creating or managing translations is not available in Lightning Knowledge. (You can still do this in Salesforce Classic when Lightning Knowledge is enabled.)
- For articles with more than 30 versions, the versions above 30 show in Salesforce Classic, but not in Lightning Experience.
- After you enable Lightning Knowledge, the Article Type field is no longer accessible via SOQL (or the API). This can impact custom code that queries for the 'ArticleType' field.
- If your org currently has a Visualforce tab named "Knowledge," you get an "Insufficient Privileges" error when trying to access the Knowledge tab in Lightning Knowledge. To avoid this error, rename or delete your existing Visualforce tab, or rename your Knowledge Base from "Knowledge" to something else.

### General usage limitations for Lightning Knowledge

- Delete archived articles is not available in Lightning Knowledge. (You can still do this in Classic when Lightning Knowledge is enabled.)
- In a Lightning Knowledge enabled org, the ModifyAll permission is necessary to delete archived articles
- Article actions with public groups are not used when Lightning Knowledge is enabled. This is replaced by new user profile permissions.
- You currently can't remove a published article while editing it. Instead, the article remains published while you edit the new version as a draft. You can still do this in Classic when Lightning Knowledge is enabled.
- The action to restore a past version of an article is not available in Lightning. (You can still do this in Classic when Lightning Knowledge is enabled.)
- Top results searches don't include Knowledge article results when Lightning Knowledge is enabled.
- Mass actions (such as mass archiving and mass publishing) are not available in Lightning Knowledge.
- For list views, you must specify one language and one publishing status on all Knowledge list views. If one language and one publishing status are not specified in ListViews, we default to "Published" for Publishing Status and the default user language for language.
- We don't support multiple-selection on PublishStatus or Language, or the "IN" and "OR" operators in list view filters.
- Data categories can't be shown in Knowledge list views.
- You can't see vote information in the new ratings component unless there's a Published (also known as online) version of the article. This affects article drafts and archived articles, because all online versions are removed when an article is archived.

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- Most Knowledge actions aren't available in the Lightning Process Builder.
- Translation files cannot be exported from the Files Related list for translation.
- Master Article: When only importing a master article *with its record type info*, Knowledge creates the article with the record type.
- Master Article: When importing a master article *with its translation and record type*, Knowledge creates the article and its translation, but not the record type.
- Modifying search results in Knowledge search layouts does not change the results in Lightning Knowledge Global Search or Classic Global Search.
- Spell Check (Chrome): Knowledge overrides Chrome's right-click Spell Check menu.

#### Console limitations for Lightning Knowledge

- The Knowledge footer is not in the Lightning Service Console.
- The following actions aren't available in the Knowledge sidebar for the Lightning Service Console: attach as a PDF to case email and insert article Community URL to case publishers.
- In the Knowledge sidebar, File Custom Fields and File Related Lists cannot be shared through the email publisher when performing an insert article to email action.
- Case field to Data Category mapping for search filters isn't currently available in the Lightning Knowledge Component.

#### Limitations in Salesforce Classic after enabling Lightning Knowledge

- Page Layouts selections for Actions and Related lists are not available in Salesforce Classic Record Home.
- Two Column Page Layouts are not available in Salesforce Classic Knowledge Record Home
- Some actions, such as Change Record Type, aren't available in Salesforce Classic.
- Knowledge list views aren't available in Salesforce Classic.
- Filtering a search by Knowledge Record Type is not available in Salesforce Classic.
- Filtering a search by archived articles is not available in Salesforce Classic (except in Article Management).
- Files in the Files Related list in Lightning Experience don't display in Salesforce Classic.
- Files in the Article File Fields in Salesforce Classic don't display in Lightning Experience.

#### Limitations for using Lightning Knowledge with other Salesforce products

- File attachments in your Classic Knowledge implementation don't transfer to Lightning Knowledge. After migrating your articles to Lightning Knowledge, add the Files Related List to your page layout and use the Files Related List on each article to add files to your articles.
- You can't detach or remove a file from the Files component after it has been associated with an article. When the file is shared with a record via the record feed, the workaround is to delete the feed post.
- To remove an attached file from an article, delete the file from File home.
- Reporting with record types is not supported in Lightning Knowledge.
- The rich text editor is limited for Lightning Knowledge. Smart links and anchors aren't supported in Lightning Knowledge.
- If you are using Salesforce for Android or iOS, recent articles are not displayed on object home.
- The Files Related List on Knowledge articles is not supported in Communities.

## Set up Lightning Knowledge

Enable Lightning Knowledge, create Knowledge record types, customize your record type page layouts, set access for Knowledge users, and create a Lightning Knowledge process.

### Enable Lightning Knowledge

Enable Lightning Knowledge to use your Knowledge base in Lightning Experience. After you enable Lightning Knowledge, you can't disable it.

### Create Lightning Knowledge Record Types

Create record types to distinguish types of Knowledge articles. In Lightning Knowledge, standard record types replace custom article types.

### Customize Your Lightning Knowledge Record Type Page Layouts

For each record type you create, you can customize the page layout. You can control the form and structure for each type of article you have in your Lightning Knowledge base.

### Create Lightning Knowledge Home

Create the Lightning Knowledge home page to access Knowledge in Lightning Experience. For orgs created in Spring '17 or later, the Lightning Knowledge home page is created for you.

### Set Access for Lightning Knowledge

Give your knowledge agents access to articles in Lightning Knowledge. Specify which agents in your company are Salesforce Knowledge users, those who can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

### Define Validation Status Picklist Values

When the `validation_status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

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## Enable Lightning Knowledge

Enable Lightning Knowledge to use your Knowledge base in Lightning Experience. After you enable Lightning Knowledge, you can't disable it.

1. From Salesforce Classic Setup, enter `Knowledge` in the `Quick Find` box and click **Knowledge Settings**.
2. If you're new to Knowledge, enable Knowledge in Salesforce Classic by selecting **Yes** and clicking **Enable Salesforce Knowledge**.
3. On the Knowledge Settings page, click **Edit**.
4. Select **Enable Lightning Knowledge**.
5. Click **Save**.

After Lightning Knowledge is enabled, the node **Knowledge Object Setup** appears. This is where you control your Lightning Knowledge settings and page layouts.

Whenever you change the name and API name of your Knowledge Base in **Knowledge Object Setup**, we recommend you do a hard refresh of your browser to avoid server errors.

 **Note:** Enabling Lightning Knowledge changes your Org's Data Model to use Record Types rather than Article Types. Orgs with multiple articles types require data migration to consolidate

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article types before enabling Lightning Knowledge. **IMPORTANT:** After you enable Lightning Knowledge, you can't disable it. Test in a Sandbox or Trial org before enabling in production.

## Create Lightning Knowledge Record Types

Create record types to distinguish types of Knowledge articles. In Lightning Knowledge, standard record types replace custom article types.

Different content has different needs. For example, your FAQ pages are different from your tutorials, which are different from your policy statements. Record types let you control the content and layout for each type of article.

1. From Salesforce Classic Setup, go to **Build > Knowledge > Knowledge Object Setup**.
2. Under Record Types, click **New**.
3. Select an existing record type to use as a template. The new record type includes all picklist values from the existing record type that you select.
4. Enter a label for your record type.
5. If desired, enter a description.
6. Select **Active** if you want this record type to be usable immediately.
7. Select the profile access for this record type.
8. Click **Next**.
9. Select the page layout that users with this profile see for record with this record type.
10. Click **Save**.

### SEE ALSO:

- [Tailor Business Processes to Different Users](#)
- [Create Custom Fields](#)

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## Customize Your Lightning Knowledge Record Type Page Layouts


For each record type you create, you can customize the page layout. You can control the form and structure for each type of article you have in your Lightning Knowledge base.


Record type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. You can customize the fields, actions, and related lists for each record type and user profile.

For example, you might customize page layouts by user profile when sensitive data is involved. By assigning a page layout by user profiles, you can display more sensitive fields of the same article to only the agents who need to access them.

1. From Salesforce Classic Setup, enter *Knowledge* in the **Quick Find** box, then select **Knowledge Object Setup**.
2. Scroll down to the Page Layouts related list or click the Page Layouts link at the top of the page.
3. To create a page layout, click **New** and follow the prompts. To edit an existing layout, click **Edit** and make your changes.

Make your changes. 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.

 **Important:** If you navigate away from your record-type layout before clicking save, your changes are lost.

 **Note:** The **Title** and **URL Name** standard fields are required.

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### USER PERMISSIONS

To customize the record-type layout:

- Customize Application

Task	Description
Add a section	Drag and drop the section element into the palette.
Change the name of a section	Click its title. You cannot rename the Information section.
Specify 1 or 2 columns	Select 1 or 2 columns for this layout. For 2-column layouts, you can set the navigation flow direction (up-down or left-right).
Remove a field from a section	Drag it to the right side of the palette or click the  icon next to the field.
Remove a section from the article-type layout	Click the  icon next to the section name.
Save your changes and continue editing the article type layout	Click <b>Quick Save</b> .

### Tip:

- 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.

4. To assign various layouts to the article type based on a user profile, click **Page Layout Assignments**.
5. Click **Edit Assignment**.
6. Select the profile, or profiles (using SHIFT), you want to change and select the layout from the **Page Layout To Use** drop-down.

SEE ALSO:

[Page Layout Tips](#)

## Create Lightning Knowledge Home

Create the Lightning Knowledge home page to access Knowledge in Lightning Experience. For orgs created in Spring '17 or later, the Lightning Knowledge home page is created for you.

Everything you need, all in one place. Search, view, author, and manage articles on a single Knowledge home page in Lightning Experience. Plus, you can do several authoring actions without leaving Knowledge home.

For published articles, you can:

- Create an article
- Archive a published article
- Edit a published article as a new draft

For article drafts, you can:


- Create an article
- Publish a draft article
- Delete a draft article
- Edit a draft article

For archived articles, you can:

- Create an article
- Restore an archived article

Allow other users to access these actions using standard user permissions. You can also make these actions available on the record home with page layouts.

Lightning Knowledge home uses the same list views you enjoy elsewhere in Salesforce. By default, you have list views for drafts, published articles, and archived articles. Don't forget to customize your list views to select which fields you want to display and sort with. For custom list views, keep in mind that you can't choose fields that aren't on the article record. This means that data categories, ratings, view count, and cases aren't available fields for your list views.

 **Important:** If you don't specify a language for your list views, the default language is the user language, otherwise it is the Knowledge master language. We don't support multiple-selection on PublishStatus or Language, or the "IN" and "OR" operators in list view filters.

Use the Lightning App Builder to configure record home flexipage to match your users' workflow. In addition to out of the box components, this includes components built by partners and developers from the AppExchange. You can even build your own components. The

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Lightning Home Record Home functionality gives Admins the flexibility to move the Ratings, Files, Versions, Data Category Viewer, and Data Category Chooser components to the areas of the page that work best for users,

SEE ALSO:

[Authoring Actions in Lightning Knowledge](#)

## Set Access for Lightning Knowledge

Give your knowledge agents access to articles in Lightning Knowledge. Specify which agents in your company are Salesforce Knowledge users, those who can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

Lightning Knowledge uses new user profile permissions instead of public groups to give agents access to article actions. By default, all internal users with Read permissions, can read articles. However, you need to assign permissions to agents who are publishing, archiving, deleting, and managing articles.



**Note:** To do more than read articles, agents need the Knowledge User license.

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 user.
3. If you are creating a user, complete all the required fields.
4. Select the **Knowledge User** checkbox.
5. Click **Save**.

User permissions control access to different tasks. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you can create a permission set called "Article Manager" that includes the permissions to create, edit, publish, assign, delete, and archive articles.

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

Lightning Knowledge Task	User Permissions Needed
To manage record types:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)  AND "Create", "Edit", and "Delete" on Knowledge
To manage article actions:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)
To search for and read articles:	"Read" on Knowledge
To search articles on cases and attach articles to cases:	"Read" on Knowledge

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### USER PERMISSIONS

To create or edit users:

- Manage Internal Users

To create article types and article actions (Classic Knowledge only):

- Customize Application  
AND  
Manage Salesforce Knowledge

To create record types and article actions (Lightning Knowledge only)

- Customize Application  
AND  
Manage Salesforce Knowledge  
AND  
Create, Edit, and Delete on Knowledge

**Lightning Knowledge Task****User Permissions Needed**


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To create articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read” and “Create” on Knowledge

---

To edit draft articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read” and “Edit” on Knowledge

---

To delete draft articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Edit”, and “Delete” on Knowledge

---

To publish articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on Knowledge

AND

“Publish Articles” (New in Lightning Knowledge)

---

To change the record type of a draft article:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read” and “Edit” on Knowledge

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To archive published articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Edit”, and “Delete” on Knowledge

AND

“Archive Articles” (New in Lightning Knowledge)

---

To create a draft of a published article:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on Knowledge

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**Lightning Knowledge Task****User Permissions Needed**

To restore an archived article as a new draft:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on Knowledge

AND

“Archive Articles” (New in Lightning Knowledge)

To create data categories

“Manage Data Categories” permission. (This permission is on by default in the System Administrator profile.)

To enable agents to perform their specific tasks, create [public groups](#) for each role and assign only the necessary [article actions](#) to those groups.



**Example:** Your Salesforce Knowledge agents are a mixture of different levels of job experience and expertise in the products and services your company offers. These examples outline four basic types of users and some of the permissions they need to perform their jobs.

**Scott: The Reader**

Scott Jackson is relatively new to the company, so he’s a basic agent 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.

Scott	Permission	Knowledge Permissions			
		Read	Create	Edit	Delete
<b>Salesforce Knowledge Functionality</b>	<b>Manage Articles</b>				
Search articles from and attach articles to cases		✓			
Search for and read articles		✓			

**Amber: The Candidate**

Amber Delaney is a candidate-level agent 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	Knowledge Permissions			
		Read	Create	Edit	Delete
<b>Salesforce Knowledge Functionality</b>	<b>Manage Articles</b>				
Search articles from and attach articles to cases		✓			
Search for and read articles		✓			

Amber	Permission		Knowledge Permissions			
	Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
	Create or edit article	✓	✓	✓	✓	
	Edit draft articles	✓	✓		✓	
	Edit a published article as a new draft or restore an archived article as a new draft	✓	✓	✓	✓	✓

### Anne: The Contributor

As a contributor, Anne Murphy is a more advanced Knowledge 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 Contributor public group and she needs the following permissions to perform her job duties.

Salesforce Knowledge Functionality	Permission		Knowledge Permissions		
	Manage Articles	Read	Create	Edit	Delete
Create articles	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Search for and read articles		✓			
Edit draft articles	✓	✓		✓	
Delete articles (version or entire)	✓	✓		✓	✓
Archive articles	✓	✓		✓	✓

### Pat: The Publisher

Pat Brown is Knowledge domain expert and is responsible for reviewing and publishing articles to an external audience. He is a member of the Publisher public group. Pat also belongs to the Publishing External queue. He needs the following permissions to perform his job duties.

Salesforce Knowledge Functionality	Article Type-Specific Permissions				
	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases		✓			
Create and edit articles	✓	✓	✓	✓	
Edit draft articles	✓	✓		✓	
Delete articles (version or entire)	✓	✓		✓	✓
Publish articles	✓	✓	✓	✓	✓
Edit a published article as a new draft or restore an archived article as a new draft	✓	✓	✓	✓	
Archive articles	✓	✓		✓	✓

### How they all work together

Each user profile defines an agent's permission to perform different job duties and functions. To enable agents to perform these functions, you create a user profile for each role and assign only the necessary permissions to that group.


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

Job Function	Reader	Candidate	Contributor	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

Job Function	Reader	Candidate	Contributor	Publisher
Update and publish Validated Internal	No	No	Automatically approved and published	Yes
Update and publish Validated External	No	No	Needs approval	Yes

## Define Validation Status Picklist Values

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

 **Note:** In Salesforce Classic, validation status picklist values aren't retained when you export articles for translation. Articles with picklist values can be imported, however, and their values are retained as long as the values exist in your organization.

1. From Salesforce Classic 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.  
When you replace a picklist value, the system replaces it in all versions of the article, including any archived versions.
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**.

SEE ALSO:

[Validation Rules](#)

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

### USER PERMISSIONS

To create or change validation status picklist values:

- [Customize Application](#)

## Use Your Lightning Knowledge Base

Search articles, author and manage articles, use the Knowledge sidebar in the Lightning Service Console, and create Knowledge reports.

### [Search Articles in the Main Search Box and the Knowledge Sidebar](#)

Perform a Knowledge search in the main search box at the top of every page, and in the Knowledge sidebar for the Lightning Service Console.

### [Authoring Actions in Lightning Knowledge](#)

Manage Knowledge articles from Knowledge home and the article record home in Lightning Experience.

### [Use the Knowledge Sidebar in the Lightning Service Console](#)

The Knowledge sidebar keeps agents connected to your Knowledge base while they're working in the console. Agents can see suggested articles for the case they're viewing, or perform a search to find more articles. They can use the sidebar to attach an article to (or remove an article from) a case, follow and unfollow articles, and search within Knowledge.

### [Report on Salesforce Knowledge Articles](#)

Use Salesforce Knowledge custom reports to track how articles are created, maintained, and delivered.

#### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.


Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

## Search Articles in the Main Search Box and the Knowledge Sidebar


Perform a Knowledge search in the main search box at the top of every page, and in the Knowledge sidebar for the Lightning Service Console.

In Lightning Experience, Knowledge search is available in both the main search box and the Knowledge sidebar. The advanced search option lets you pre-filter your results by language, publishing status, validation status, record type, or data category group.

1. In the main search box, begin typing *knowledge*. Search starts recommending content and options for scoping search to specific objects.
2. Select **Limit search to Knowledge**.
3. Optionally, click **Advanced Search** to pre-filter your results by language, publishing status, validation status, record type, or data category group. Filters you've selected appear in the search box.
4. Enter your search terms.

 **Note:** You can enter up to 100 characters. If you enter more than 100 characters, only the first 100 characters are used when you run the search.

5. Press *Enter* to run the search.

 **Note:** You can also search Knowledge using the Knowledge sidebar for the Lightning Service Console. Use **Advanced Search** to add pre-filters, enter your search terms, and run the search.

#### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

SEE ALSO:

[How Does Search Work?](#)

## Authoring Actions in Lightning Knowledge

Manage Knowledge articles from Knowledge home and the article record home in Lightning Experience.

Quickly access authoring actions in Knowledge home and the article record home using the drop-down next to each article. Administrators, agents, and internal employees with the correct profile permissions can perform these actions.

On the published articles list view in Knowledge Home, you can:

- Create an article
- Archive an article
- Edit an article as a new draft

On the article drafts list view in Knowledge Home, you can:

- Create an article
- Publish a draft
- Delete an article
- Edit an article

On the archived articles list view in Knowledge Home, you can:

- Create an article
- Restore an archived article

For the article record home, you can control the available authoring actions with record type page layouts. Additionally, you can add the following components to your record home:

- Ratings: Automatically enabled.
- Files: Add the Files related list in your record type page layout.
- Versions: Select Track Field History and Set History Tracking in Knowledge Object Setup. These options make the article version history and field changes available for Knowledge users to view in the versions component.
- Data Category Viewer and Chooser: Give the correct Knowledge users "Edit" access on Knowledge, and they can view and change an article's data categories.

SEE ALSO:

[Set Access for Lightning Knowledge](#)

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

## Use the Knowledge Sidebar in the Lightning Service Console

The Knowledge sidebar keeps agents connected to your Knowledge base while they're working in the console. Agents can see suggested articles for the case they're viewing, or perform a search to find more articles. They can use the sidebar to attach an article to (or remove an article from) a case, follow and unfollow articles, and search within Knowledge.

The Knowledge sidebar helps agents quickly find relevant Knowledge articles for their cases and perform some basic actions, such as attaching an article to a case.

### Suggested Articles

Suggested articles are delivered right to the Knowledge sidebar, so agents can find relevant articles without running a search. Suggested articles are automatically enabled when Lightning Knowledge is enabled.

### Search and Sort Your Results

Use the search box in the sidebar to perform a Knowledge search. If you'd like, use Advanced Search for pre-filtering to narrow the search results you see.

To sort your search results, click the sort icon and select a sort option from the list. You can sort your search results by relevance, publish date (for published articles), last modified date (for article drafts), A to Z, and Z to A. Sorting doesn't apply to suggested articles.

By default, articles are sorted by relevance. If you go back to suggested articles or go to a new case, the sort order is reset to relevance.

### Attach and Remove Articles in the Sidebar


Agents can attach Knowledge articles to cases and remove articles from cases using the drop-down next to any article.

### Follow and Unfollow with the Sidebar

Agents can follow and unfollow an article from the sidebar using the drop-down next to the article. Following articles helps agents save articles that they want to read later.

Administrators, agents, and internal employees with read access to Knowledge can follow articles, and they can follow articles in any state, such as published or draft. To let Knowledge users follow and unfollow articles, enable feed tracking in **Setup > Chatter > Feed Tracking**.

The Knowledge sidebar is automatically added to your sample Lightning Service Console. To add the Knowledge sidebar to a custom Lightning Service Console, add Knowledge to your selected items in the Lightning App Builder.

 **Tip:** The Knowledge Sidebar isn't limited to the console. You can add it to the Lightning Case record home using the Lightning App Builder.

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

## Report on Salesforce Knowledge Articles

Use Salesforce Knowledge custom reports to track how articles are created, maintained, and delivered.

As an administrator, you can create custom report types so agents can create reports on Salesforce Knowledge articles. Custom report types are the only way to make reports about articles available for your readers. Salesforce does not provide sample article reports or a standard report folder for articles.



**Tip:** The *Knowledge Base Dashboards and Reports* AppExchange package provides over two dozen reports that help you monitor the knowledge base and analyze usage metrics.

### [Create a Folder for Article Reports](#)

Create a public folder where you can store article reports for your users.

### [Article Reports](#)

Create a custom report type to report on Salesforce Knowledge article data.

### [Create an Article Report](#)

Run your custom report on your Salesforce Knowledge articles and save them to your article reports folder.

### [Fields Available on Salesforce Knowledge Reports](#)

The fields you can use in a knowledge report depend on the type of information you are reporting on.

### EDITIONS

Available in: **Salesforce Classic**, **Lightning Experience**

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

### USER PERMISSIONS

To create or update custom report types:

- **Manage Custom Report Types**

To create a public reports folder:

- **Manage Public Reports**



## Create a Folder for Article Reports

Create a public folder where you can store article reports for your users.

1. In the Report Folder section of the Reports tab, click **Create New Folder**.
2. Enter *Article Reports* in the `Folder Label` field.
3. Optionally, modify the `Group Unique Name`.
4. Choose a `Public Folder Access` option.  
Select read/write if you want users to be able to add and remove reports.
5. Choose a folder visibility option.
6. Click **Save**.

Reports you store in this folder are available on the Reports tab.

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

### USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

## Article Reports

Create a custom report type to report on Salesforce Knowledge article data.

To create a custom report:

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types** and click **New Custom Report Type**.

See [Create a Custom Report Type](#)

2. In the Primary Object drop-down menu, select the article-related object you want to report on:

Primary Object	Description
Article types (Classic Knowledge only)	Compare information such as creation dates, published channels, and number of associated cases for your custom article type, such as an FAQ. To access any history and custom fields for the custom article type, add the article type's version as a secondary object.
Knowledge Articles	Compare information about individual articles, such as their creation dates, published channels, and number of associated cases. If you choose this custom report type, you can also include article view and vote statistics. In reports using the Knowledge Articles primary object, each article has five records (rows): one for each channel (All Channels, Internal App, Customer, Partner, and Public Knowledge Base).
Knowledge Article Searches	Analyze the number of searches per day, month, or year for each channel and role.
Knowledge Article Version	Compare information about individual translations, such as their creation dates, published channels, and number of associated cases. If you choose this custom report type, you can also include article view and vote statistics.
Article Version History	Compare information about individual article versions, such as their creation dates, published channels, and number of associated cases.
Knowledge Article Views	Analyze the number of views per day, month, or year for each channel and role.
Knowledge Article Votes	Analyze the number of votes per day, month, or year for each channel and role.
Knowledge Keyword Search	See which keywords users are looking for in your knowledge base.
Knowledge Search Activity	<ul style="list-style-type: none"> <li>• Analyze the number of searches per day, month, or year for each channel and language.</li> <li>• For each search, see the:             <ul style="list-style-type: none"> <li>– Date</li> <li>– ID and title of the article that was clicked</li> </ul> </li> </ul>

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

### USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

- See which keywords users are looking for in your knowledge base.
  - For each keyword, see the average number of:
    - Results
    - Articles that appear in the search results
  - For each article, see the average number of:
    - Clicks
    - Unique users who clicked it
- 

**3.** Complete the required fields and click **Save**.

In the Store in Category drop-down menu, we recommend choosing **Customer Support Reports** or **Other Reports**. This is the category where users find the custom report type on the Reports tab.

**4.** Make your choices on the Define Report Records Set page.

Primary Object	Available Secondary Objects
Article types (Classic Knowledge only)	Article type Versions
Knowledge Articles	Article View Statistics, Article Vote Statistics, Case Article
Knowledge Article Searches	None
Knowledge Article Version	Article View Statistics, Article Vote Statistics
Article Version History	None
Knowledge Article Views	None
Knowledge Article Votes	None
Knowledge Keyword Search	None
Knowledge Search Activity	None

**5.** Click **Save**.

**6.** As needed, remove and rearrange fields from your report layout.

To learn which fields are available on each primary object, see [Fields Available on Salesforce Knowledge Reports](#) on page 25.

 **Note:** An article's score is calculated slightly differently in the API than it is in a custom report. We recommend standardizing on one or the other and not attempting to use both.

## Create an Article Report

Run your custom report on your Salesforce Knowledge articles and save them to your article reports folder.

Using your [custom report types](#), create article reports and save them to your [article reports folder](#).

1. On the Reports tab, click **New Report**.
2. Choose the category where your custom report types are stored; for example, **Customer Support Reports** or **Other Reports**.  
The Cases with Articles report is available by default in the Customer Support Reports folder.
3. Find your report type and click **Create**.
4. When viewing your report, click **Save As** and save it in the new Article Reports folder to make the report available to other users.

### Note:

- In reports using the Knowledge Article custom report type, there are at least five rows per article (one for each channel, including "All Channels").
- Daily values are reported independently for the last 90 days and monthly values for the last 18 months. After those time periods, use the monthly aggregate and yearly aggregate values, respectively.
- In reports using the Knowledge Article Votes, Knowledge Article Views, or Knowledge Article Searches custom report types, each row represents a day, channel, and role combination. For example, if a user with the Kingmaker role views articles in the internal app and the next day the same reader views more articles in the internal app, the Article Views report has two rows: one for each unique date.
- In reports using Knowledge Article Version (KAV), except Knowledge Article Version History, you can filter by data category. You can add up to four filters and set their logic to AT, ABOVE, BELOW, or ABOVE OR BELOW. The logic between filters is OR. You can use the same category group multiple times, however, you must use the same operator each time.
- To report on Approval Processes for Knowledge Articles, use **Process Instance** and **Process Instance Node** when creating a custom report type. Then filter the report on object type, which is the article type.

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

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### USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

## Fields Available on Salesforce Knowledge Reports

The fields you can use in a knowledge report depend on the type of information you are reporting on.

The following tables list the available fields by primary object for Salesforce Knowledge reports.

### Fields Available on Article types (Classic Knowledge only) Reports

The Article Type primary object allows you to add a secondary object of the article type version.

**Table 1: Article Type Report Primary Object Fields**

Field	Description
Archived By	User who archived the article.
Archived Date	Date the article was archived.
Article Number	Unique number automatically assigned to the article.
Article Type ID	The ID associated with the article type.
Case Association Count	Number of cases attached to the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
Custom fields	Any custom fields created on the article types. Add the article type's version as a secondary object to access any custom fields for the article type.
First Published Date	Date the article was originally published.
Knowledge Article Version	The article's version number.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Last Published Date	Date the article was last published.
Master Language	The original language of the article.

#### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

#### USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

 **Note:** Currently you can't use Knowledge Article Version and Last Modified Date in the same report.

**Table 2: Article Type Report Secondary Object Fields**

Field	Description
Archived By	User who archived the article.
Article Type	The article type associated with the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
Custom fields	Any custom fields created on the article types. Add the article type's version as a secondary object to access any custom fields for the article type.
Is Latest Version	Indicates if the article is the most recent version.
Is Master Language	Indicates that the article is not a translation, but the original article.
Knowledge Article Version ID	Unique ID automatically assigned to the article translation.
Language	The article's language.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Out of Date	Indicates that the master article has been updated since this translation was published.
Publication Status	Indicates whether the article or translation is in progress (draft), published, or archived.
Summary	Description of the article provided by the author.
Title	The article's title.
Translation Completed Date	Date the translation was completed.
Translation Exported Date	Date the article was exported for translation.
Translation Imported Date	Date the translation was imported.
URL Name	Text used as hyperlink for the article.
Validation Status	Indicates if the article is valid or not.
Version Number	The version number of the article.

Field	Description
Visible in Customer	Indicates that the article is published in the Customer Portal.
Visible in Internal App	Indicates that the article is published in the internal app (Articles tab).
Visible in Partner	Indicates that the article is published in the partner portal.
Visible in Public Knowledge Base	Indicates that the article is published in the public knowledge base.

## Fields Available on Knowledge Articles Reports

Field	Description
Article Number	Unique number automatically assigned to the article.
Article Type	The article type associated with the article.
Case Association Count	Number of cases attached to the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
First Published Date	Date the article was originally published.
Is Latest Version	Indicates if the article is the most recent version.
Knowledge Article Version ID	Unique ID automatically assigned to the article translation.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Last Published Date	Date the article was last published.
Summary	Description of the article provided by the author.
Title	The article's title.
URL Name	Text used as hyperlink for the article.
Validation Status	Indicates if the article is valid or not.
Version Number	The version number of the article.
Visible in Customer	Indicates that the article is published in the Customer Portal.
Visible in Internal App	Indicates that the article is published in the internal app (Articles tab).

Field	Description
Visible in Partner	Indicates that the article is published in the partner portal.
Visible in Public Knowledge Base	Indicates that the article is published in the public knowledge base.

### Fields Available on Knowledge Article Searches Reports

Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.
Count	The number of article searches applicable to the duration shown (day, month, or year).
Cumulative Count	The total number of article searches for the history of the record.
Date	Last date on which an article search took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are Daily, Monthly, and Yearly. For example, a record where the Count is 70 and the Duration is Monthly indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Related Role	Name of the role that applies to the record. Each row in the report represents searches per channel per role.

### Fields Available on Knowledge Article Version Reports

Field	Description
Archived By	User who archived the article.
Archived Date	Date the article was archived.
Article Number	Unique number automatically assigned to the article.
Article Type	The article type associated with the article.
Case Association Count	Number of cases attached to the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
First Published Date	Date the article was originally published.
Is Latest Version	Indicates if the article is the most recent version.



Field	Description
Is Master Language	Indicates that the article is not a translation, but the original article.
Knowledge Article Version ID	Unique ID automatically assigned to the article translation.
Language	The article's language.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Date the article was last published.	Date the article was last published.
Master Language	The original language of the article.
Out of Date	Indicates that the master article has been updated since this translation was published.
Publication Status	Indicates whether the article or translation is in progress (draft), published, or archived.
Summary	Description of the article provided by the author.
Title	The article's title.
Translation Completed Date	Date the translation was completed.
Translation Exported Date	Date the article was exported for translation.
Translation Imported Date	Date the translation was imported.
URL Name	Text used as hyperlink for the article.
Validation Status	Indicates if the article is valid or not.
Version Number	The version number of the article.
Visible in Customer	Indicates that the article is published in the Customer Portal.
Visible in Internal App	Indicates that the article is published in the internal app (Articles tab).
Visible in Partner	Indicates that the article is published in the partner portal.
Visible in Public Knowledge Base	Indicates that the article is published in the public knowledge base.

### Fields Available on Knowledge Article Views Reports

You can add up to 6 of the 8 fields below.

Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.
Count	The number of article views applicable to the duration shown (day, month, year).
Cumulative Count	The total number of article views for the history of the record.
Date	Last date on which an article view took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are Daily, Monthly, and Yearly. For example, a record where the Count is 70 and the Duration is Monthly indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Related Role	Name of the role that applies to the record.
Score	Article's average view rating. Scoresake into account a half-life calculation. Every 15 days, if an article has not been viewed its average rating moves up or down. This calculation ensures that over time, older or outdated articles don't maintain artificially high or low ratings compared to newer, more frequently viewed articles.
Total Views	Number of times a published article has been viewed.

### Fields Available on Knowledge Article Votes Reports


Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.
Count	The number of article votes applicable to the duration shown (day, month, year).
Cumulative Count	The total number of article votes for the history of the record.
Date	Last date on which an article vote took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are Daily, Monthly, and Yearly. For example, a record where the Count is 70 and the Duration is Monthly indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Related Role	Name of the role that applies to the record.

### Fields Available on Knowledge Keyword Search Reports

Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.

Field	Description
Count	The number of keyword searches applicable to the duration shown (day, month, year).
Date	Last date on which a keyword search took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are <code>Daily</code> , <code>Monthly</code> , and <code>Yearly</code> . For example, a record where the Count is 70 and the Duration is <code>Monthly</code> indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Found	Indicates whether the keyword shown was found during a search of the knowledge base.
Keyword	Search term used to search published articles in the knowledge base.

## Fields Available on Knowledge Search Activity Reports

Field	Description
Average Click Rank	The order in which the article appeared in search results when results are sorted by relevance and when readers clicked it from the list of results.
Channel	The channel that's applicable to the article. Possible values are <code>All Channels</code> , <code>Internal App</code> , <code>Customer</code> , <code>Partner</code> , and <code>Public Knowledge Base</code> .
Clicked Article Title	The title of the clicked article taken when the search results are sorted by relevance by the reader.
Duration	The time period the search count is applied to. Possible values are <code>Daily</code> , <code>Monthly</code> , and <code>Yearly</code> . For example, a record where the Count is 70 and the Duration is <code>Monthly</code> indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
	 <b>Note:</b> Activity totals are collected nightly and aren't in real time.
Language	The language filter that's applied to the reader's search.
Number of Results	The number of search results that were returned for the search term. If Duration is also included, this value is aggregated based on the time period specified.
Number of Searches	The number of searches for the duration that's shown (day, month, or year).
Number of Users	The number of individual users who clicked the article.
Search Date	The date of the search.
Search Term	The first 100 characters of the search term that was used to search published articles in the knowledge base.

## Define Data Categories for Your Lightning Knowledge Articles

Create data categories and data category groups to help Knowledge users and customers find what they need. Some data category information doesn't apply to Lightning Knowledge.

### [Data Categories in Salesforce.com](#)

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

### [Create and Modify Category Groups](#)

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

### [Add Data Categories to Category Groups](#)

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.

### [Filter Articles with Data Category Mapping](#)

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

## Data Categories in Salesforce.com

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

Salesforce Knowledge uses data categories to classify articles and make them easier to find. For example, to classify articles by sales regions and products, create two category groups: Sales Regions and Products. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level and North America, Europe, and Asia at the second level. The Products group could have All Products as the top level and Phones, Computers, and Printers at the second.

Data Category Limits	Details	
Maximum number of data category groups and active data category groups	5 category groups, with 3 groups active at a time	5 category groups, with 3 groups active at a time
Maximum number of categories per data category group	100 categories in a data category group	100 categories in a data category group
Maximum number of levels in data category group hierarchy	5 levels in a data category group hierarchy	5 levels in a data category group hierarchy

### EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

Data Category Limits	Details	
Maximum number of data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article

In an answers zone, data categories help organize questions for easy browsing. Each answers zone supports one category group. For example, if you're a computer manufacturer you might create a Products category group that has four sibling categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. On the Answers tab, zone members can assign one of the four categories to each question and then browse these categories for answers to specific questions.

### Example:

#### Logical Classification of Articles

As a knowledge base administrator, you can organize your knowledge base articles into a logical hierarchy and tag articles with the attributes that are significant to your business.

#### Easy Access to Questions

As an answers administrator, you can choose which data categories are visible on the Answers tab. Zone members can tag a question with a category, which makes finding questions and answers easier for other members.

#### Control of Article and Question Visibility

As a knowledge base or answers community administrator, you can centrally control the visibility articles or questions by mapping roles, permission sets, or profiles to categories in the category groups. When an article or question is categorized, users with visibility can automatically see it.

#### Article Filtering

As a support agent, when articles are classified into logical categories, you can quickly and easily locate the article you need by filtering your organization's knowledge base. To ensure you see all relevant articles, filtering by category has expansive results that include a category's upward and downward relatives in the category hierarchy. For example, if your category hierarchy for products has the levels All Products > Computers > Laptops > Gaming Laptops and you are helping a customer with a laptop problem, filtering by Laptops returns articles classified with Laptops as well as articles classified with Computers, All Products, or Gaming Laptops. Effectively, you are made aware of useful related articles like a free shipping offer for all products or an upgrade offer for gaming laptops. (To prevent irrelevant results, category filtering doesn't return nonlinear relatives like siblings and cousins. Articles about Desktops, a sibling of Laptops, would not display.)

#### Article and Question Navigation

As an end user, you can navigate the categories on the Articles tab or Answers tab to find the information you need to solve your problem.

#### Managing Category Groups for Articles and Questions

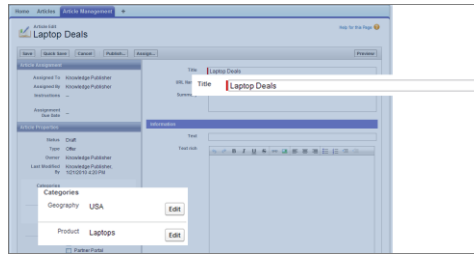
If your organization has Salesforce Knowledge and an answers community, you can create separate category groups or use the same category group for articles and questions.

#### Data Categories in Articles

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.

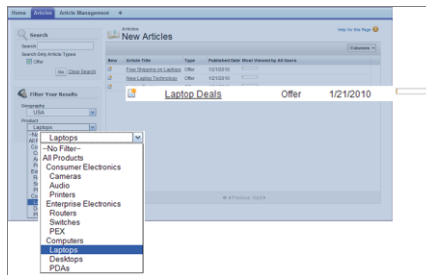
As an illustration, the figure below shows a knowledge base administrator's view of an article about laptop deals; using the article edit page, the administrator has classified the article with Laptops in the Products category group, and USA in the Geography category group.

### An Article About Laptop Deals on the Article Management Tab



The next figure now illustrates an agent finding that same article published on the Articles tab; the agent has selected Laptops and USA respectively in the Products and Geography drop-down menus to retrieve an article that is classified with both Laptops and USA.

### An Article About Laptop Deals on the Articles Tab



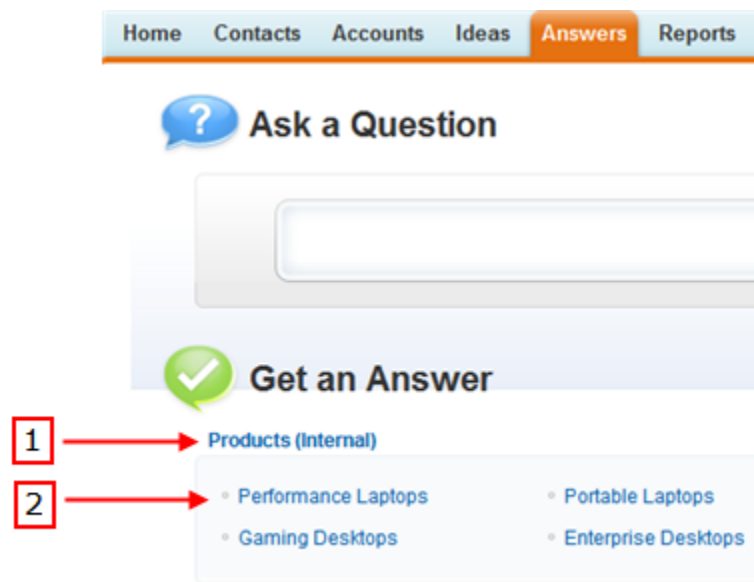
When you add categories to a category group, you build a hierarchy that can contain up to five levels of depth and up to 100 categories total. Each category can have one parent, many siblings, and many children. A robust and well-organized category hierarchy helps users find the articles that are relevant to them quickly and easily.

By default, all Salesforce Knowledge users have access to all categories; however, you can [restrict category visibility by role, permission set, or profile](#).

### Data Categories in Answers Zones

An answers zone supports one category group, and members can assign one category to each question. 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. The categories within the group display on the Answers tab below the zone name.

## Answers tab displaying categories



By default, all zone members have access to all categories; however, you can [specify category visibility](#).

### Data Category 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, Article Management, and Knowledge tabs 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. Readers 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 for Data Categories


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.




## Create and Modify Category Groups

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. To create a category group, click **New** in the Category Groups section.  
By default, you can create a maximum of five category groups and three active category groups. To edit an existing category group, hover your cursor over the category group name and then click the **Edit Category Group** icon (  ).
3. Specify the **Group Name** up to a maximum of 80 characters. This name appears as the title of the category drop-down menu on the Article Management and Articles tabs, and, if applicable, in the public knowledge base. The **Group Name** does not appear on the Answers tab.
4. Optionally, modify the **Group Unique Name** (the unique name used to identify the category group in the SOAP API).
5. Optionally, enter a description of the category group.
6. Click **Save**.  
You receive an email after the save process completes.

### Activating Category Groups

When you add a 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 (  ).

You can now [add categories](#) to your category group. When you create a category group, Salesforce automatically creates a top-level category in the group named **A11**. Optionally, double-click **A11** to rename it.

### EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

### USER PERMISSIONS

To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:


- Manage Data Categories

## Add Data Categories to Category Groups

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.

Administrators can create data categories for Salesforce Knowledge articles, questions in a zone, or ideas to classify and find articles, questions, or ideas. You can also use data categories to control access to articles, questions, and ideas.

By default, you can create up to 100 categories in a data category group and have up to 5 levels in a data category group hierarchy. To request more categories or hierarchy levels, contact Salesforce.


 **Note:** On the Answers tab, only first-level data categories display. Therefore, when creating data categories for a portal or community, ensure that the categories you want visible have a sibling relationship and not a parent-child relationship.

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 up to a maximum of 40 characters.

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.

### EDITIONS

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- View Data Categories

To create, edit, or delete data categories:

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## Filter Articles with Data Category Mapping

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

### Important:

- Filtering articles based on case information is only supported in text and picklist fields.
- Filters are applied to Knowledge results after the case has been saved.
- Filters are applied after a Knowledge search and only to the articles returned in the search.
- Using Filters does not return a list of all articles that match the filter criteria. Instead, the filters are applied to the initial pool of article results returned.
- Results may be filtered after a search.
- A category group can only be used once in a data category mapping.
- Suggested articles are returned if `Suggest articles for cases considering case content` is enabled. When suggested articles is disabled, search uses data category mappings. Case subject fields are used when there are no data category mappings.

To implement data category mapping, select which case fields map to which data categories and set a default data category for cases that have no value for the mapped fields.

For information on data categories, see [Data Categories in Salesforce.com](#) on page 32.

1. From Setup, enter *Data Category Mappings* in the `Quick Find` box, then select **Data Category Mappings**.
2. In the `Case Field` column, use the drop-down list to add a field.
3. In the `Data Category Group` column, use the drop-down list to map the information from the lookup field to a data category.
4. In the `Default Data Category` column, use the drop-down list to assign a data category when the field value does not match any categories from the category group.
5. Click **Add**.

### EDITIONS

Available in: Salesforce Classic, Lightning Experience

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### USER PERMISSIONS

To map data category groups

- `Customize Application`  
AND  
`Manage Salesforce Knowledge`

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