Flinders University

Updating Knowledge Articles in CRM

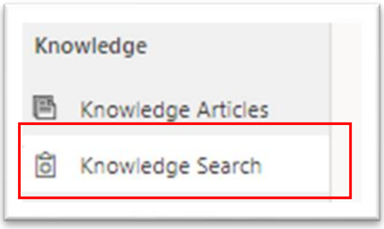
This guide has been created to outline how you can search, create or update a knowledge article in Dynamics CRM

1.0 Searching for a knowledge article

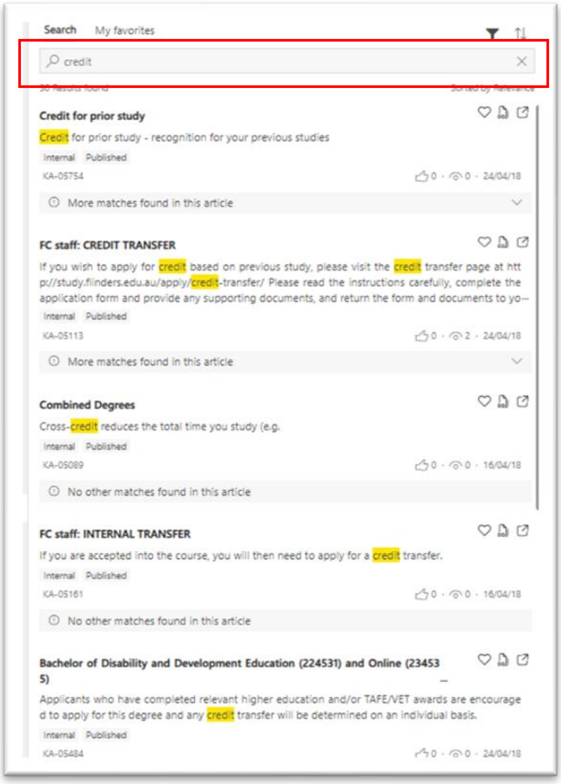
There are 2 ways that you can search for a knowledge article in Dynamics CRM.

1.1 Search via the 'knowledge search' menu

1. The first option is you can use the knowledge search function in the Nav menu.



2. Selecting this option will give you a search bar and it's just a matter of typing in the subject that you'd like to search for e.g. 'Credit' in the search bar.



3. You will now be able to find all the articles that have the word 'credit' applicable to the article.

Note: This search is the recommended option as it will which look for the word 'credit' in all related knowledge articles.

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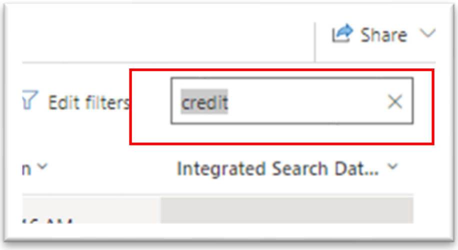
1.2 Search via the ‘knowledge articles’ menu

1. The second option is searching via the knowledge articles menu.

2. Select Knowledge Articles in the Nav menu.
3. In the **Quick find** field (top right hand corner) type in ‘**credit’** then hit “***enter***”.



4. You should now find a list of articles that relate to your search.

Note: The quick find function will only look for articles that have the word ‘credit’ in the title and is not as in depth as the knowledge search function which looks for the word 'credit’ in the whole article.

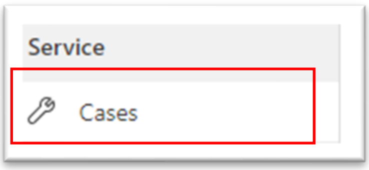
2.0 Creating a Knowledge Article

This section details how you can create a knowledge article from an existing case. This is especially helpful when dealing with cases that are not normally handled or if there are learnings that can be derived from the interaction.

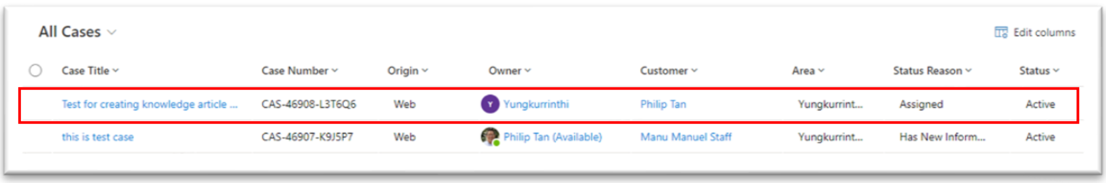
By default, any knowledge articles created will be accessible externally unless it has been flagged as internal only.

2.1 Creating a knowledge article from a case.

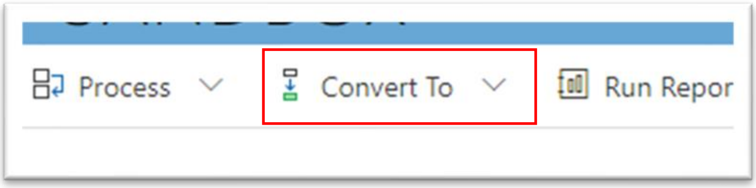
1. Go to and click **Cases** from the *Nav menu*.



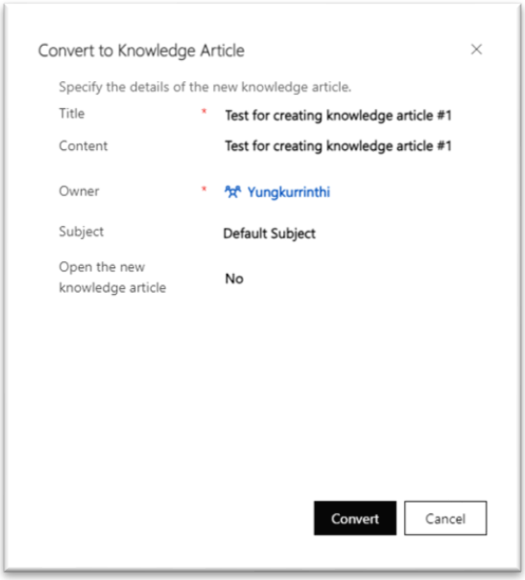
2. Select the Case that you want to create the knowledge article for.



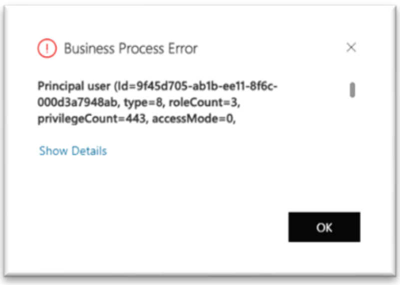
3. Once you have selected the case in question, Click on **Convert to** (in the Action menu) and select **to Knowledge Article**



4. A pop-up will appear. Fill out the **Title**, **content**, **owner** and apply a **subject** (if required) otherwise you can leave it as Default subject. For the option "**open the new knowledge article**", choose **Yes** otherwise **No** (default) will populate.



5. Click on **Convert**.
6. *Note: only authorised users with the correct permissions can create knowledge articles. If you don't have the correct permissions, you'll encounter an error as such:*



7. The knowledge article will now open (if you have the correct permissions). Below is a map for editing/creating knowledge articles.

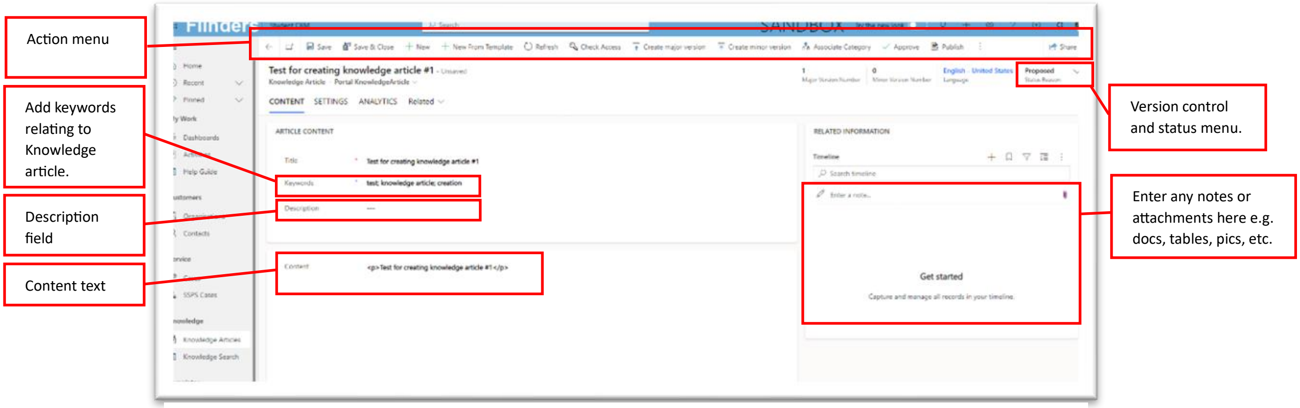
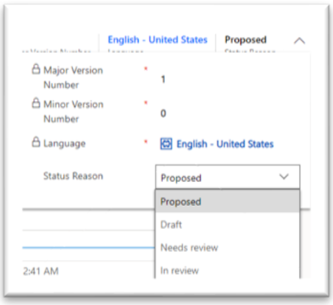


Figure 1: Menu map for knowledge article creation

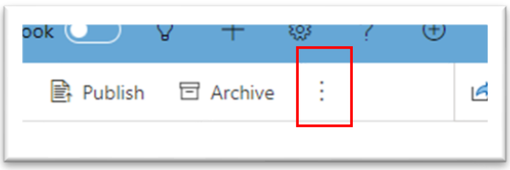
8. Fill in any additional information for the knowledge article:
9. **Keywords** - Add any additional details to the knowledge article to make it easier to search for. Separate keywords with a ;
10. **Description** – Add a more in depth description for the knowledge article.
11. **Content** – If there are any other details relating to the case or article.
12. **Notes** - You can also add notes with attachments.

Definition	Details
Major Version	This is the major version of an article e.g., Main Heading (1.x)
Minor Version	Minor version of an article e.g., Subheading (x.1)

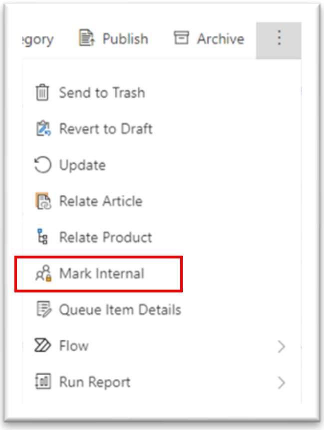
13. Once completed, in the version control and status menu, click on the chevron.



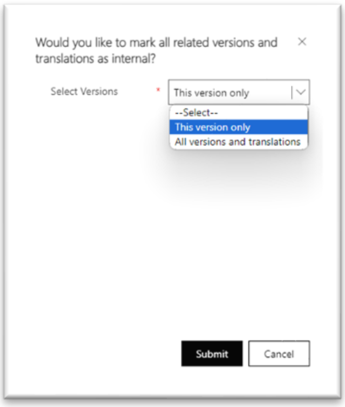
14. Pop up will now appear and click on Status Reason.
15. Select from the list – proposed, draft, needs review or in review.
16. By default, Dynamics CRM will make any knowledge article available to both external and internal users. If you need to change this to only internal follow the following steps:
17. In the action menu, click on the ellipsis.



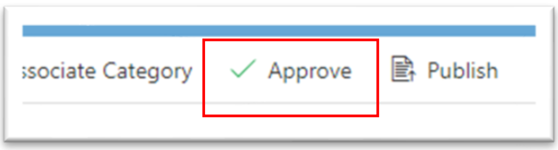
18. A list of options will pop up.



19. Select “***Mark Internal***”.
20. System will now ask you if you want to mark all related versions and translations as internal.



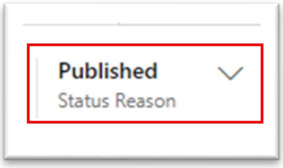
21. Select from “**This version only**” or “**All versions and translations**.”
22. Once you have made your choice, click **Submit**.
23. If you don’t need to have the article reviewed, click on Approve in the Action menu.



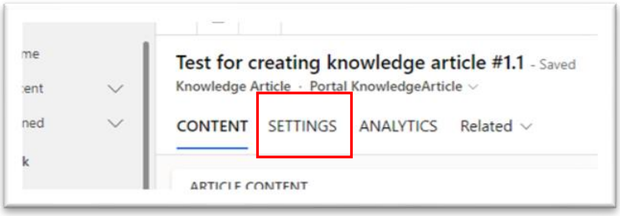
24. You’ll now receive a confirmation for approval of article.

25. Click **OK**.

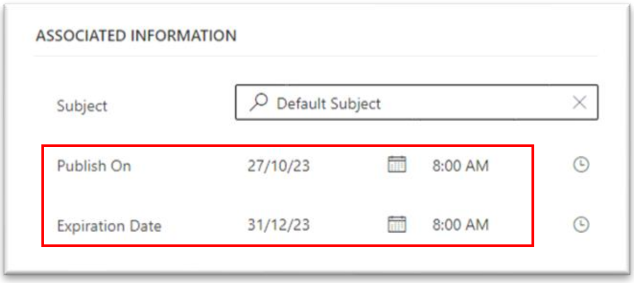
26. Once the article has been approved, you'll notice that the status will now be changed to "**Published**" in the *version control and status menu*.



27. Once the status has been published, click on the **Settings** tab.



28. In the Associated information Section



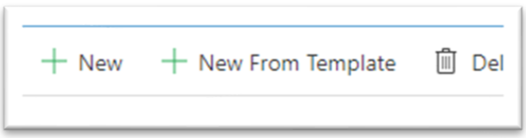
29. Set the date and time for **Publish on**
30. Set the date and time for **Expiration Date**

Note: By specifying the publish on date and expiration date would ensure that the article can be found through the Knowledge Search function.

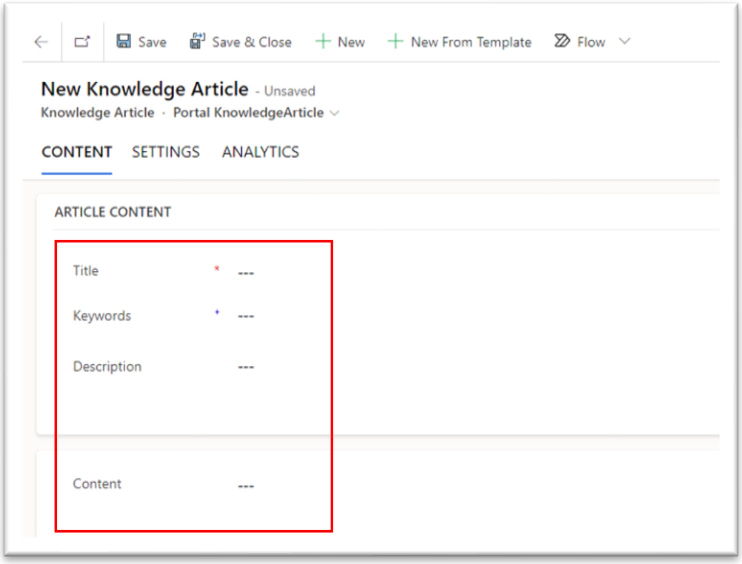
2.2 Creating a knowledge article New or New from template.

1. The only difference between creating new/new from template and converting a case into a knowledge article is that the Title, description and some content has already been prepopulated.
2. Click on Knowledge Articles in Nav menu.

3. In the Action menu, click **New** or **+New from Template**.



4. Complete the following fields:
5. Title – What do you want your knowledge article to be called?
6. Keywords – Enter keywords to enable ease of search
7. Description – Detailed description of the knowledge article.
8. Content – Details, Outline, steps, process or what the article is all about.



9. Follow step 13 onwards from *2.1 Creating a knowledge article from a case.*