



Knowledge CRM Analytics Dashboards



@salesforcedocs

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1. App installation throws error “Your org does not currently meet minimum data requirements to proceed. Please fix the following issues before creating a 'Knowledge TCRM' Application: In the '[NODE NAME]' node, the '[FIELD NAME]' field doesn't exist, is deprecated, or isn't accessible to the Integration User.” 26
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ABOUT THIS GUIDE

This guide gives insights into the latest updates to the app, what's been added, and how it works in the Lightning UI.

EDITIONS

Available in Lightning Experience.

- Enterprise
- Developer
- Performance
- Unlimited

USER PERMISSIONS

To install and customize the Knowledge CRM Analytics package:

- Download AppExchange Packages

To create the Knowledge CRM Analytics App:

- Analytics View Only Embedded App
- Access to View-Only Licensed Templates and Apps

To view the Knowledge CRM Analytics App:

- Analytics View Only Embedded App
- Access to View-Only Licensed Templates and Apps

Overview

The Knowledge CRM Analytics package consists of Dashboards based on the objects: Knowledge Article, Knowledge Article Version, Knowledge Version History, Data Category, Knowledge ViewStat, Search Activity, Topics, Case, Case Article, Work Orders, Linked Article, Einstein Bot, Approval Process, User and User Role.

They are intended to help track the use of Knowledge Articles inside an organization.

Limitations

- Only one Knowledge Analytics App can be created per org.
- Maximum of 25M dataset rows.
- Maximum of 250 API calls per hour.
- No access to CRM Analytics Studio.
- The information shown in the Dashboards is only from Articles in 'Published' and 'Draft' status.
- Information about Articles that are Archived is not shown.
- Disclaimer: The records displayed in the *Most often found articles* and *Least often found articles* tables rely on the information stored in the Salesforce database. After some testing we confirmed that in some scenarios the information was not updated correctly.

Install and Configure

Before installing and configuring the Knowledge CRM Analytics package, make sure:

- **Knowledge** is enabled in your org. [Learn More](#)
- **CRM Analytics** is enabled in your org. [Learn More](#)
- Access additional help in the Salesforce [Help center](#)

Install the Managed Package

1. From the AppExchange, click **Get it Now**.
2. Choose whether to install in production or a sandbox.
3. Log into your Salesforce org when prompted.
4. Choose **Install for Admins Only**.
5. Click **Install**.
6. Follow the prompts to complete the app installation.

Assign Permissions to the Analytics Integration User

1. Go to **Setup | Users | Permission Sets**
2. Click on **'kcrma Analytics Integration User'**.
3. Click on **'Manage Assignments'**
4. Assign permission to **'Integration User'** (Analytics Cloud Integration User).

Setup Data Category Visibility for the Analytics Integration User

1. Go to **Setup | Users | Permission Sets**
2. Click on **'kcrma Analytics Integration User Permission'**.
3. Click on **'Data Category Visibility'**.
4. Change Category Groups Visibility to **'All Categories'**.

Note: In order to display several Data Categories in an Explore Table, when one article is associated with more than one Data Category, go to Analytics → Settings and check-mark the option *Enable indexing of multivalue fields in CRM Analytics*.

Assign Read Permission to Users

1. Go to **Setup | Company Settings | Company Information | Permission Set Licenses**
2. Click on **'Analytics View Only Embedded App'**.
3. Click on **'Assign Users'** and assign to users.
4. Go to **Setup | Users | Permission Sets**
5. Click on **'kcrma Knowledge CRM Analytics Dashboard User'**.
6. Click on **'Manage Assignments'** and assign to users.

Create the Knowledge Analytics App

1. Go to **Setup | Apps | Installed Packages**.
2. Click on **'Configure'** next to the Knowledge CRM Analytics Managed Package and a new window will be opened. The new window displays a warning message with steps needed for a proper usage of the tool.

Knowledge CRM Analytics App Configuration Page

Configure App Execute Dataflow

Warning: Complete the manual setup steps before proceeding!

Before proceeding, you should assign the correct permission set to the Analytics Cloud Integration User. Otherwise, the installation will fail.

1. Go to Setup | Users | Permission Sets
2. Click on "kcrma Analytics Integration User".
3. Click on "Manage Assignments"
4. Assign permission to "Integration User" (Analytics Cloud Integration User)

If you are using Data Category-based sharing, you should additionally ensure that the Integration User has access to all Data Categories.

1. Go to Setup | Users | Permission Sets
2. Click on "kcrma Analytics Integration User".
3. Click on "Data Category Visibility".
4. Change Category Groups Visibility to "All Categories".

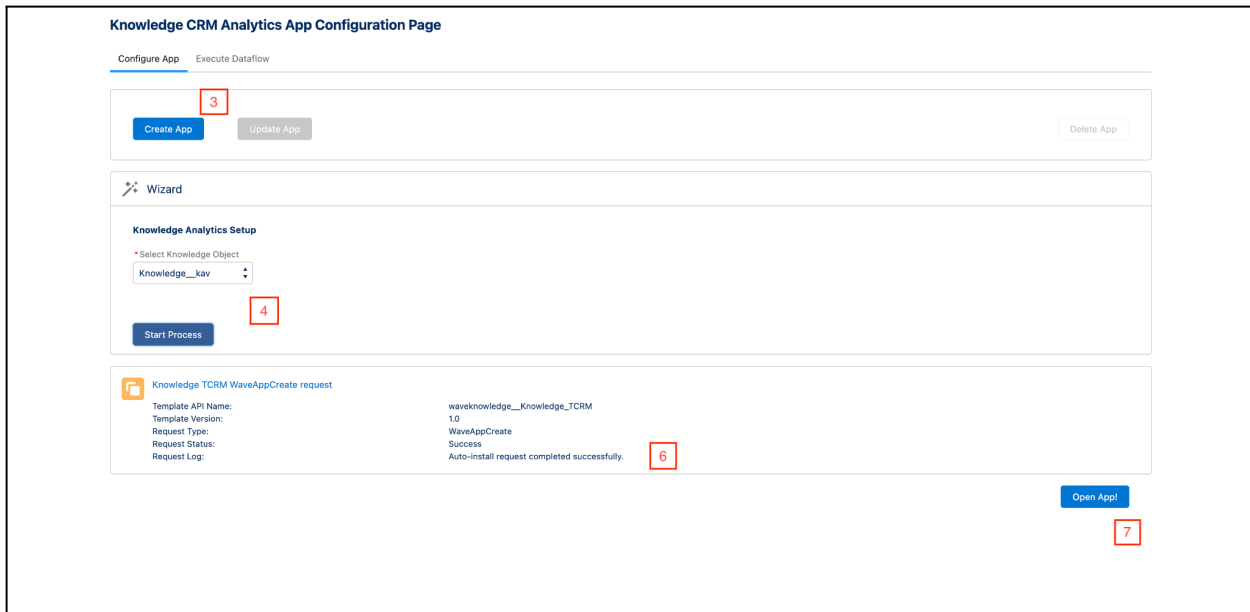
Refer to the Implementation Guide on the AppExchange page for more information.

Create App

Update App

Delete App

3. In the 'Configure App' tab, click on 'Create App' and a wizard menu will be displayed.
4. Select the Knowledge Object in your org and click on 'Start Process'.
5. An installation status section will be displayed with a request status of 'In Progress'
6. Wait until the request status changes to 'Success' (The process takes approximately 10 minutes).
7. An 'Open App' button will be displayed, click on it to be redirected to the tab with the installed dashboards.



Dataflow Execution

Execute the dataflow to refresh the dashboards and get the latest data.

1. Go to **Setup | Apps | Installed Packages**.
2. Click **Configure** next to the Knowledge CRM Analytics Managed package.
3. In the **'Execute Dataflow'** tab, click on **'Start Dataflow'** and a wizard menu will be displayed.
4. An installation status section will be displayed. Wait until the request status changes to **'Success'**.

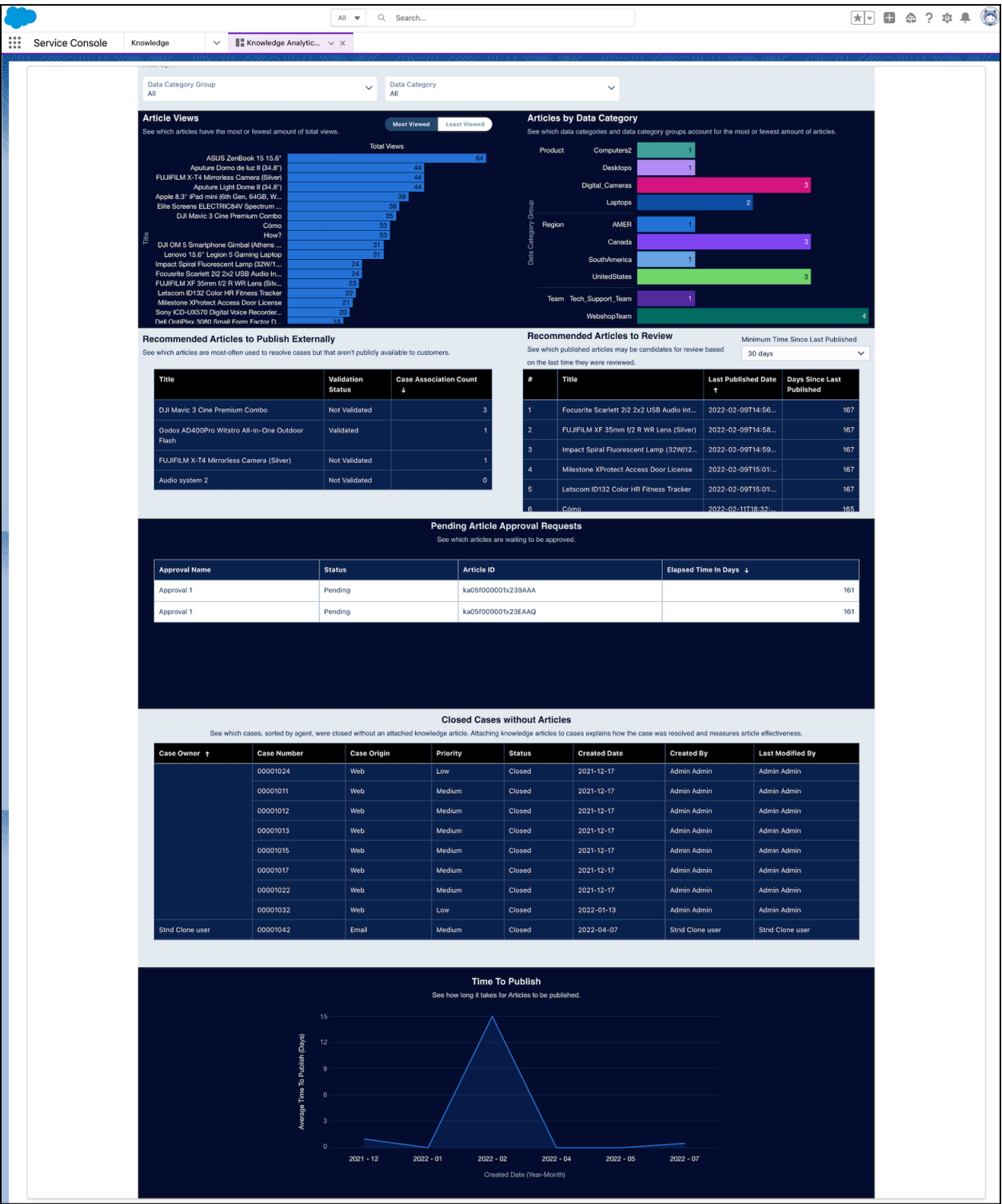
Objects used in the Dashboards

The objects used in the dashboards will depend on the organization's configuration.

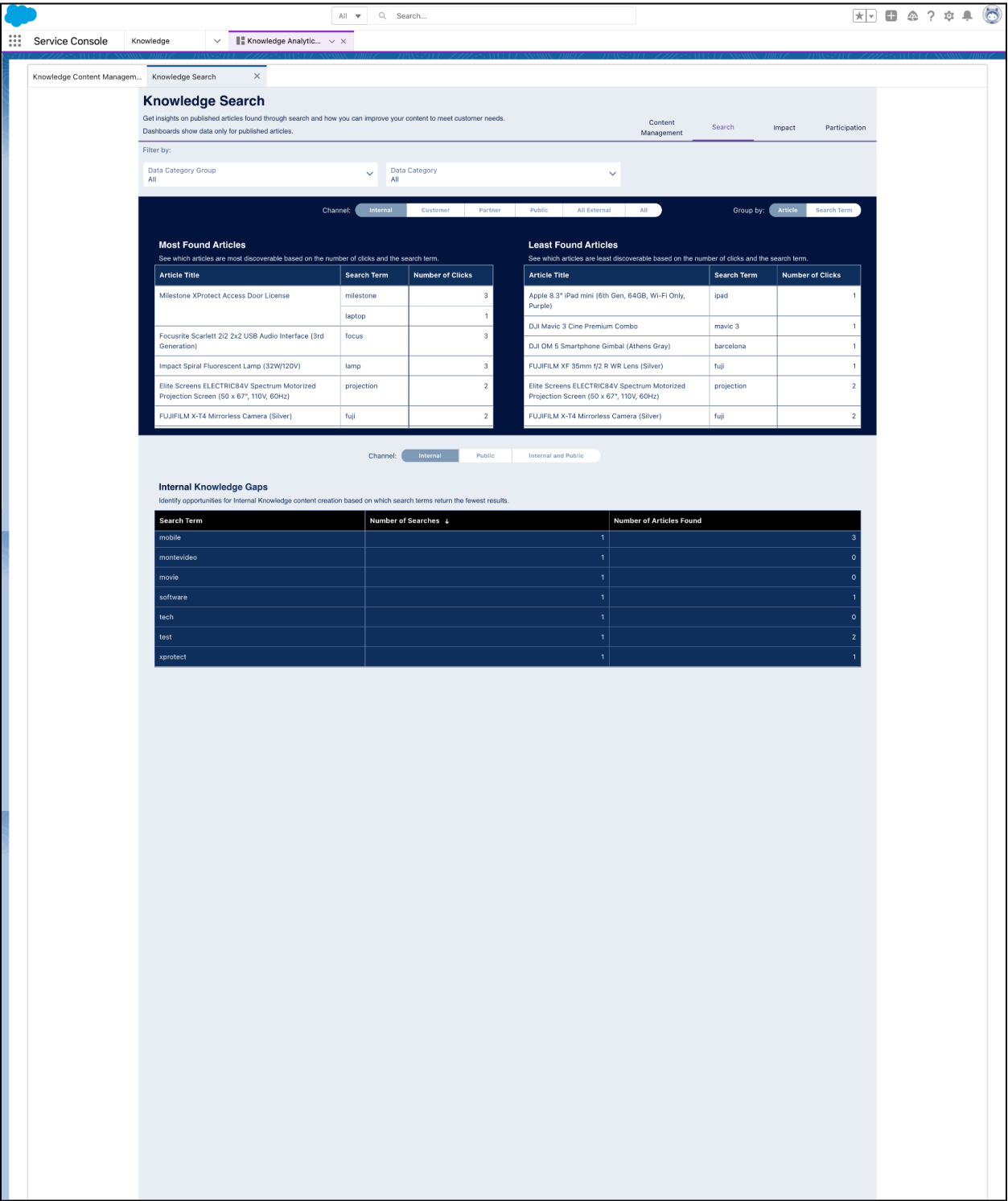
- If **Knowledge Field History** is not enabled in your org, the "Participation" dashboard will not be created.
- If **Knowledge Multiple Languages** is not enabled in your org, the "Primary Language/Translation" toggle in the "Attached Articles Per Object" table will not be created.
- If **Einstein Bots** is not enabled in your org, the "Number of Bot Attachments" column in the "Attached Articles Per Object" table will not be created.
- If the **Knowledge Validation Status** field is not activated, the "Validation Status" column in the "Recommended Articles to Publish Externally" table will not be created.

Dashboards

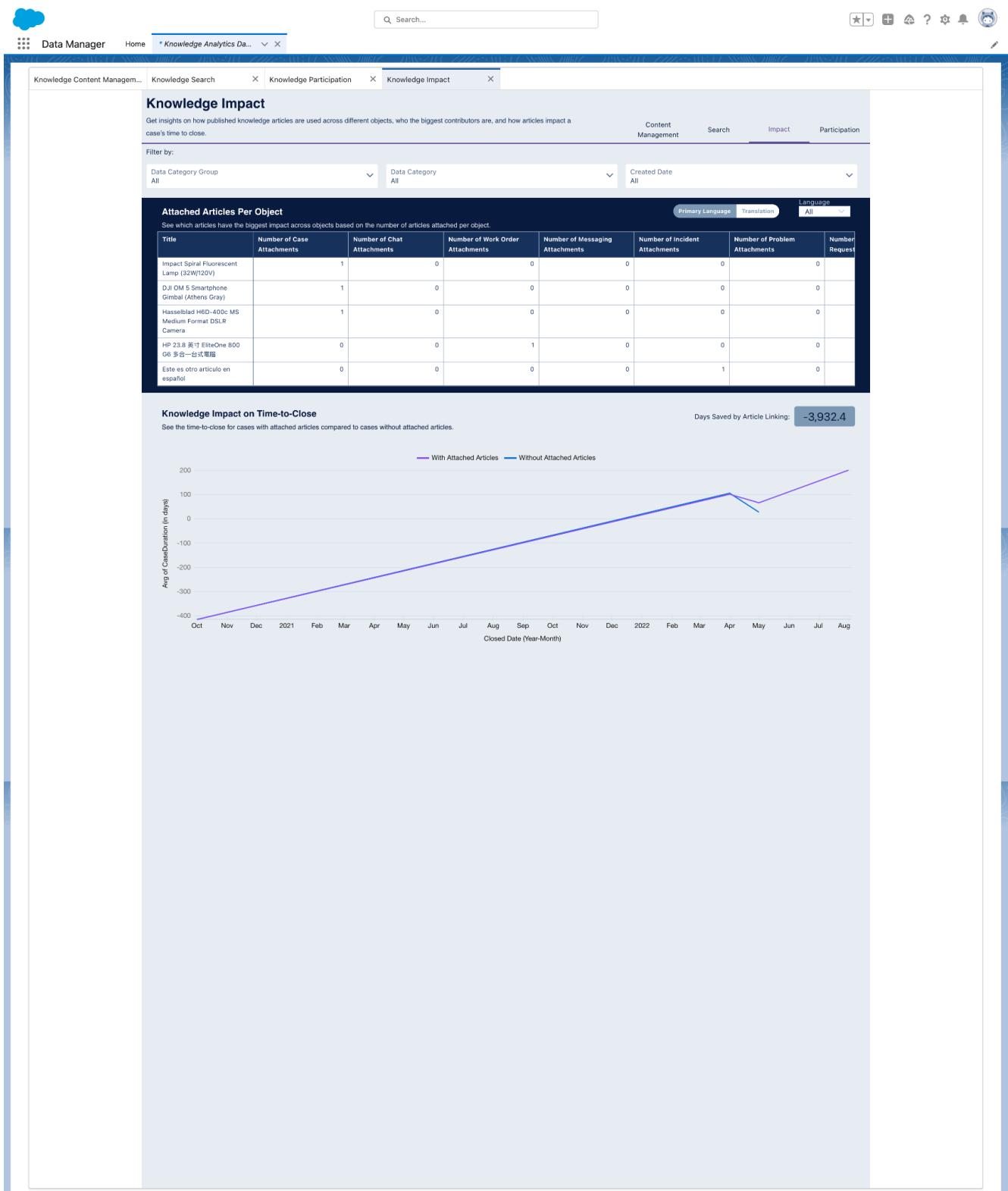
Knowledge Content Management



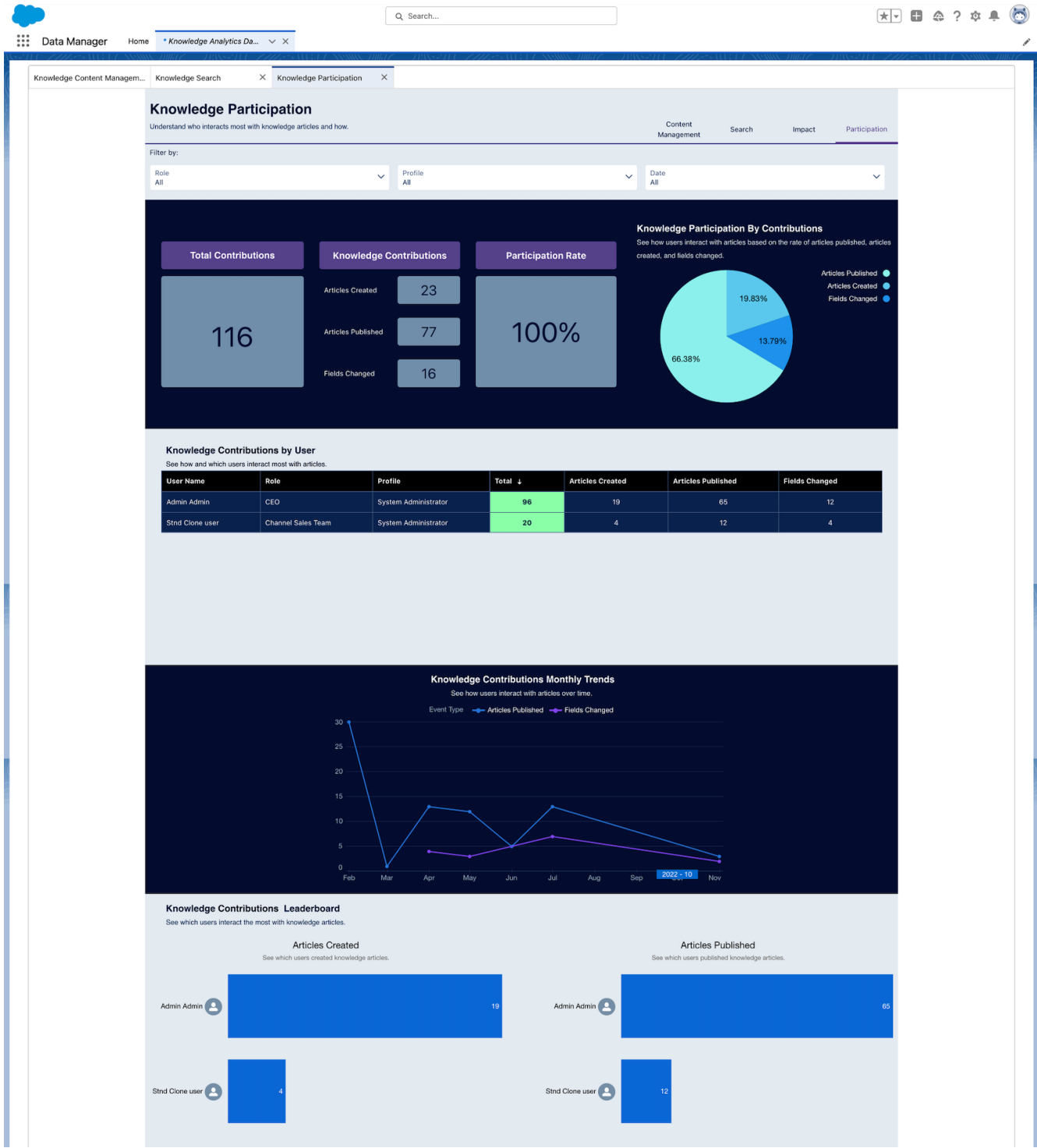
Knowledge Search



Knowledge Impact



Knowledge Participation

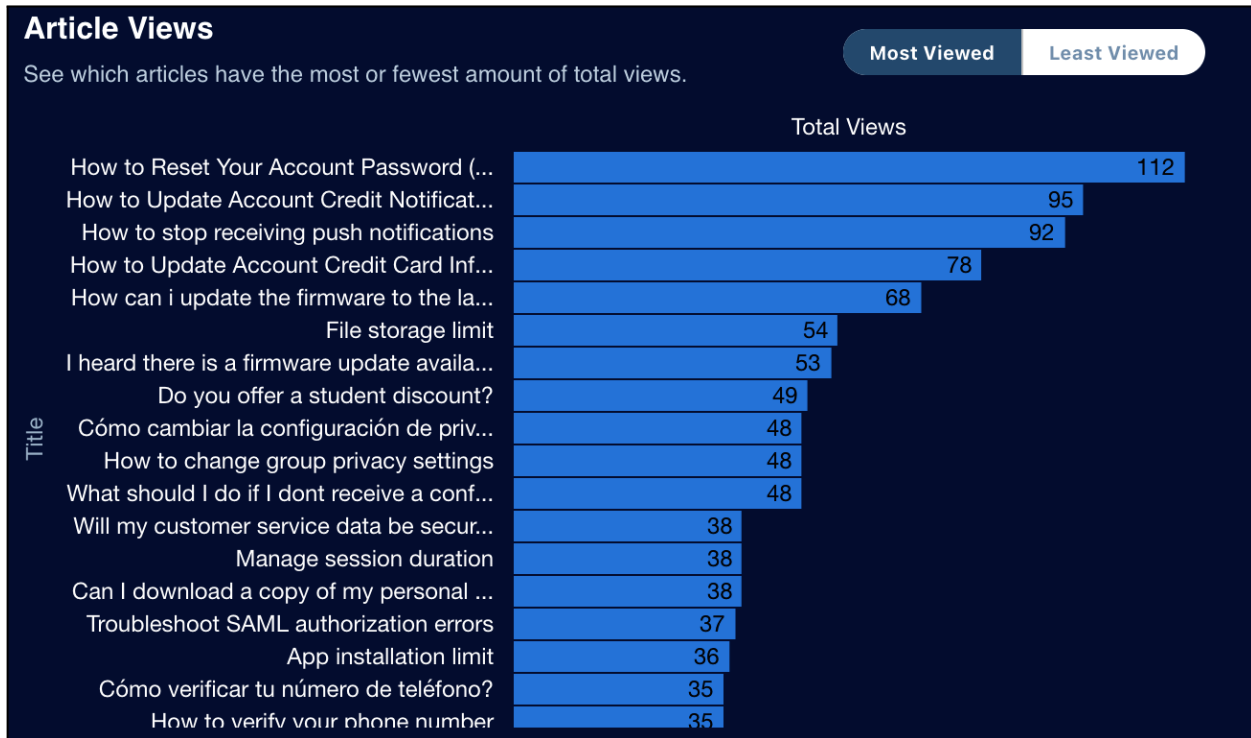




Dashboard Components

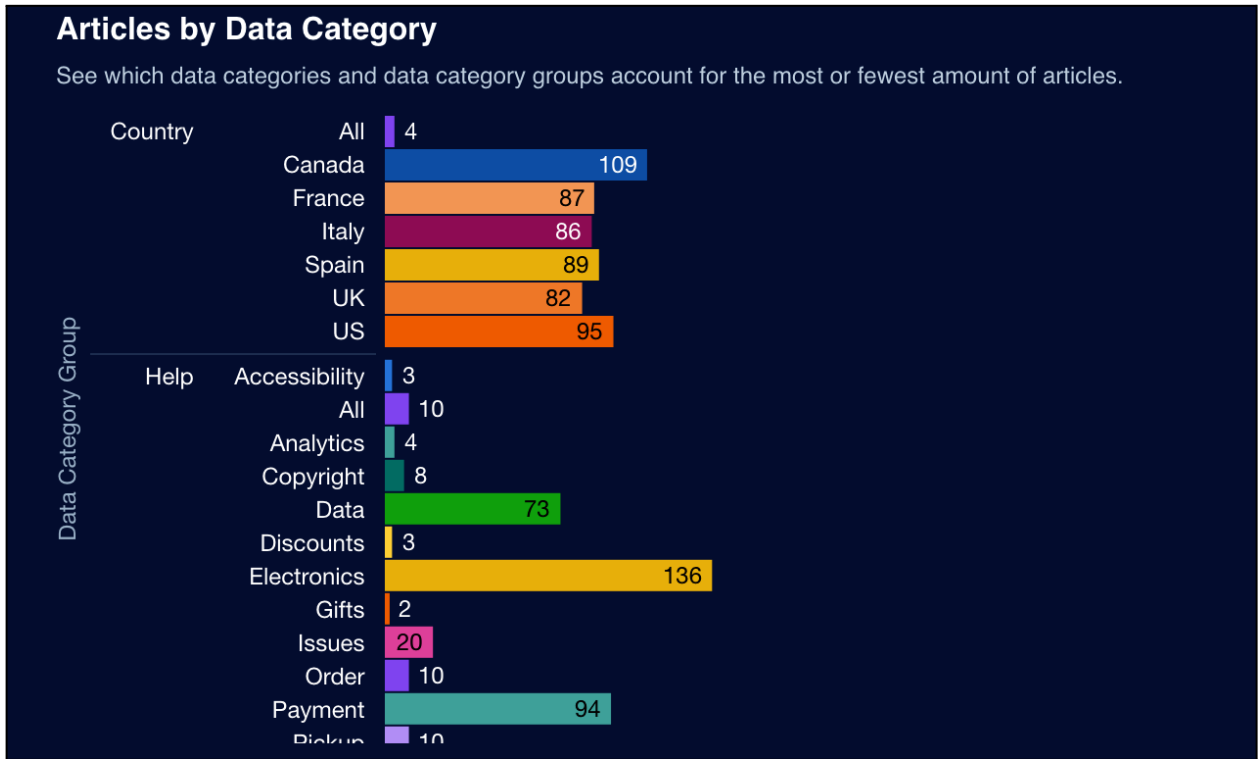
Article Views

See which articles have the most or fewest amount of total views.



Articles by Data Category

See which data categories and data category groups account for the most or fewest amount of articles.



Recommended Articles to Publish Externally

See which articles are most-often used to resolve cases but that aren't publicly available to customers.

Recommended Articles to Publish Externally		
See which articles are most-often used to resolve cases but that aren't publicly available to customers.		
Title	Validation Status	Case Association Count ↓
How can i update the firmware to the last version?	Work In Progress	1,029
How to Update Account Credit Notification Settings (Sample)	Validated	1,002
How to Update Account Credit Card Information (Sample)	Validated	1,001
Laser Rangefinders1475160812	Work In Progress	1,000

Recommended Articles to Review

See which published articles may be candidates for review based on the last time they were reviewed.

Recommended Articles to Review			
See which published articles may be candidates for review based on the last time they were reviewed.		Minimum Time Since Last Published	
		30 days	
#	Title	Last Published Date ↑	Days Since Last Published
1	Automotive1	2022-04-12T20:13:53...	105
2	Beauty138	2022-04-12T20:14:15....	105
3	Beauty137	2022-04-12T20:14:15....	105
4	Beauty140	2022-04-12T20:14:15....	105
5	Beauty141	2022-04-12T20:14:15....	105
6	Beautv142	2022-04-12T20:14:15....	105

Pending Article Approval Requests

See which articles are waiting to be approved.

Pending Article Approval Requests			
See which articles are waiting to be approved.			
Approval Name	Status	Article ID	Elapsed Time In Days ↓
Approve Article	Pending	ka08b000000ZFmvAAG	50
Approve Article	Pending	ka08b000000ZFn0AAG	50
Approve Article	Pending	ka08b000000ZFnyAAG	49

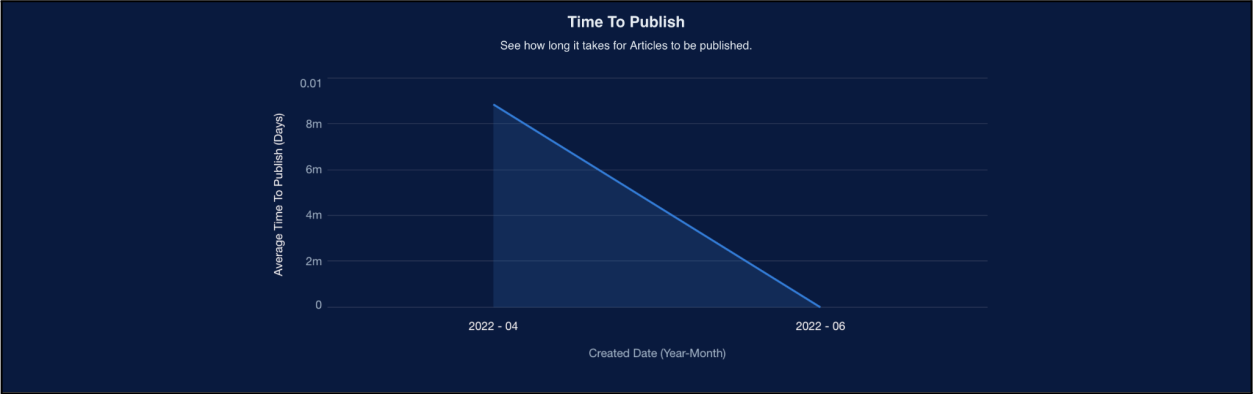
Closed Cases without Articles

See which cases, sorted by agent, were closed without an attached knowledge article. Attaching knowledge articles to cases explains how the case was resolved and measures article effectiveness.

Closed Cases without Articles							
See which cases, sorted by agent, were closed without an attached knowledge article. Attaching knowledge articles to cases explains how the case was resolved and measures article effectiveness.							
Case Owner ↑	Case Number	Case Origin	Priority	Status	Created Date	Created By	Last Modified By
Carolina Larroque	00001532	Web	Medium	Closed	2022-06-07	Carolina Larroque	Carolina Larroque

Time to Publish

See how long it takes for Articles to be published.



Most Found Articles

See which articles are most discoverable based on the number of clicks and the search term.

Most Found Articles		
See which articles are most discoverable based on the number of clicks and the search term.		
Article Title	Search Term	Number of Clicks
File storage limit	increase storage	11
	firewall	3
	file limit	2
How to stop receiving push notifications	disable notification	9
	stop push notifications	2
	notifications	1
Forgot password link loops back to login screen after answer security question correctly	wrong password	5

Least Found Articles

See which articles are least discoverable based on the number of clicks and the search term.

Least Found Articles		
See which articles are least discoverable based on the number of clicks and the search term.		
Article Title	Search Term	Number of Clicks
Can I download a copy of my personal data?	get personal data copy	1
Charged for a free trial	free trial	1
Guidelines for Creating Support Holidays	holidays	1
How do I control what personal data is processed about me?	hide personal data	1
How do I return my order?	returns	1
How much does international shipping cost?	international shipping	1
How to Report Bugs and Issues	bugs	1

Knowledge Gaps

Identify opportunities for Internal Knowledge content creation based on which search terms return the fewest results.

Channel: Internal Public Internal and Public		
Internal Knowledge Gaps		
Identify opportunities for Internal Knowledge content creation based on which search terms return the fewest results.		
Search Term	Number of Searches ↓	Number of Articles Found
firmware	7	3
saml	7	2
fraud	5	0
hp	5	0
instagram social customer	5	3
internet outage	5	0
kcs	5	0

Attached Articles Per Object

See which articles have the biggest impact across objects based on the number of articles attached per object.

Attached Articles Per Object

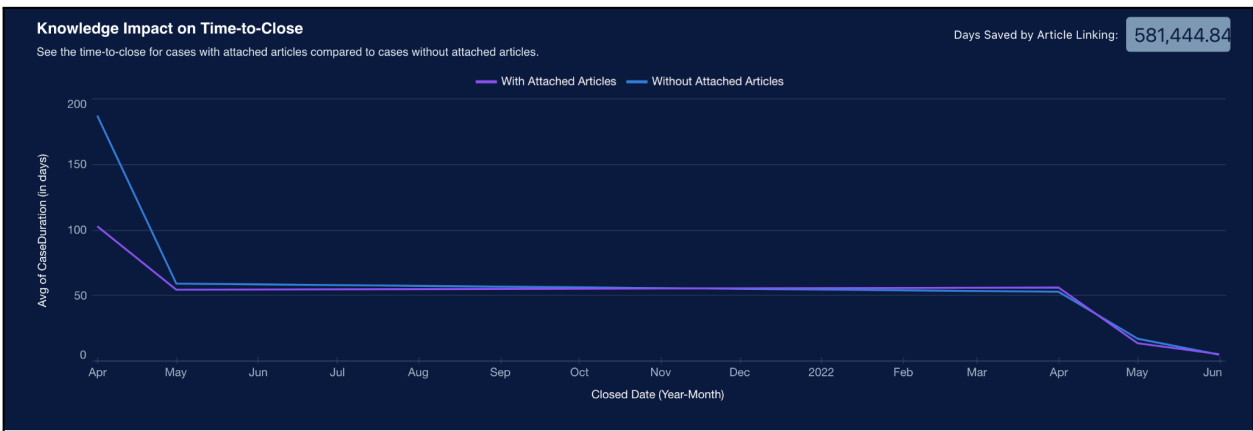
Primary LanguageTranslationLanguageAll

See which articles have the biggest impact across objects based on the number of articles attached per object.

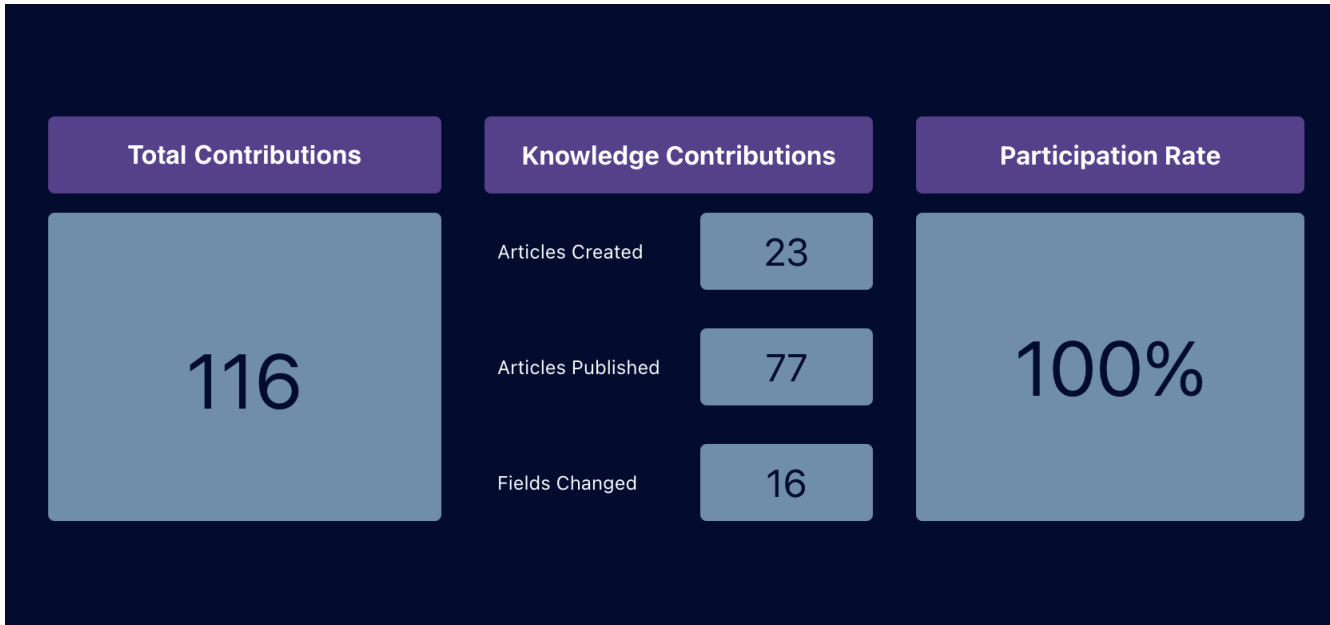
Title	Number of Case Attachments	Number of Chat Attachments	Number of Work Order Attachments	Number of Messaging Attachments	Number of Incident Attachments	Number of Problem Attachments	Number of Attachment
Do you offer a student discount?	1,841	0	0	0	0	0	
Troubleshoot SAML authorization errors	1,147	4	1	0	32	30	
How to verify your phone number	1,150	1	2	0	3	1	
How to change group privacy settings	1,148	1	1	0	2	1	
How do I control what personal data is processed about me?	1,145	1	1	0	1	1	

Knowledge Impact on Time To Close

See the time-to-close for cases with attached articles compared to cases without attached articles.



Knowledge Contributions

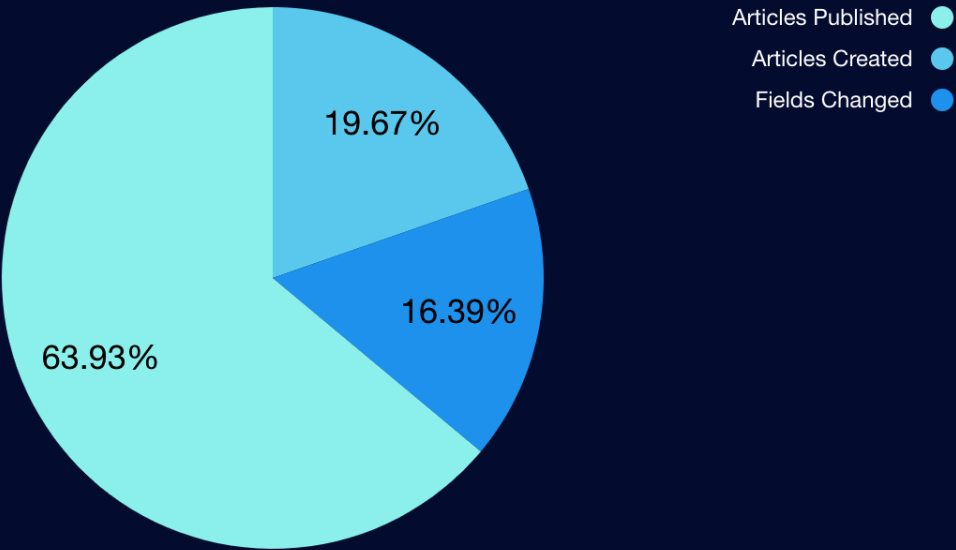


Knowledge Participation by Contributions

See how users interact with articles based on the rate of articles published, articles created, and fields changed.

Knowledge Participation By Contributions

See how users interact with articles based on the rate of articles published, articles created, and fields changed.



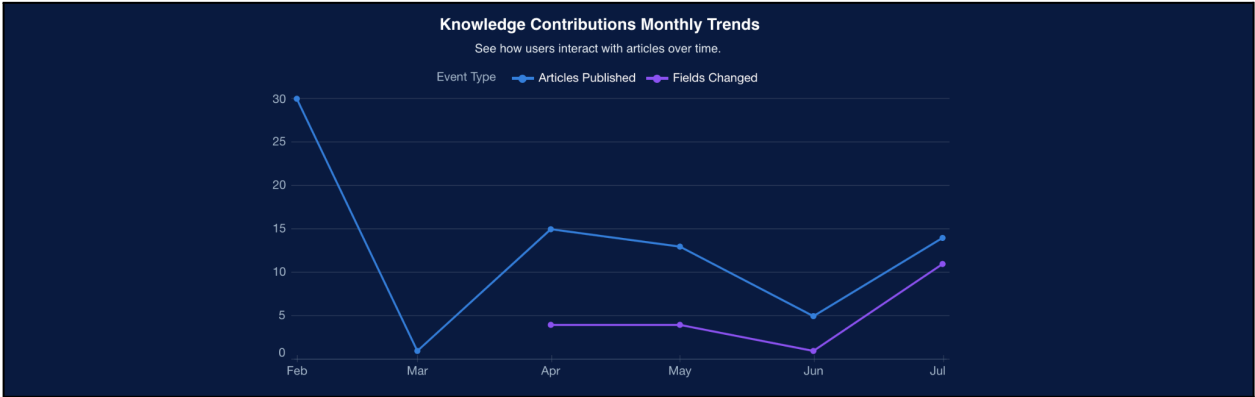
Knowledge Contributions by User

See how and which users interact most with articles.

Knowledge Contributions by User						
See how and which users interact most with articles.						
User Name	Role	Profile	Total ↓	Articles Created	Articles Published	Fields Changed
Admin Admin	CEO	System Administrator	97	20	65	12
Stnd Clone user	Channel Sales Team	System Administrator	25	4	13	8

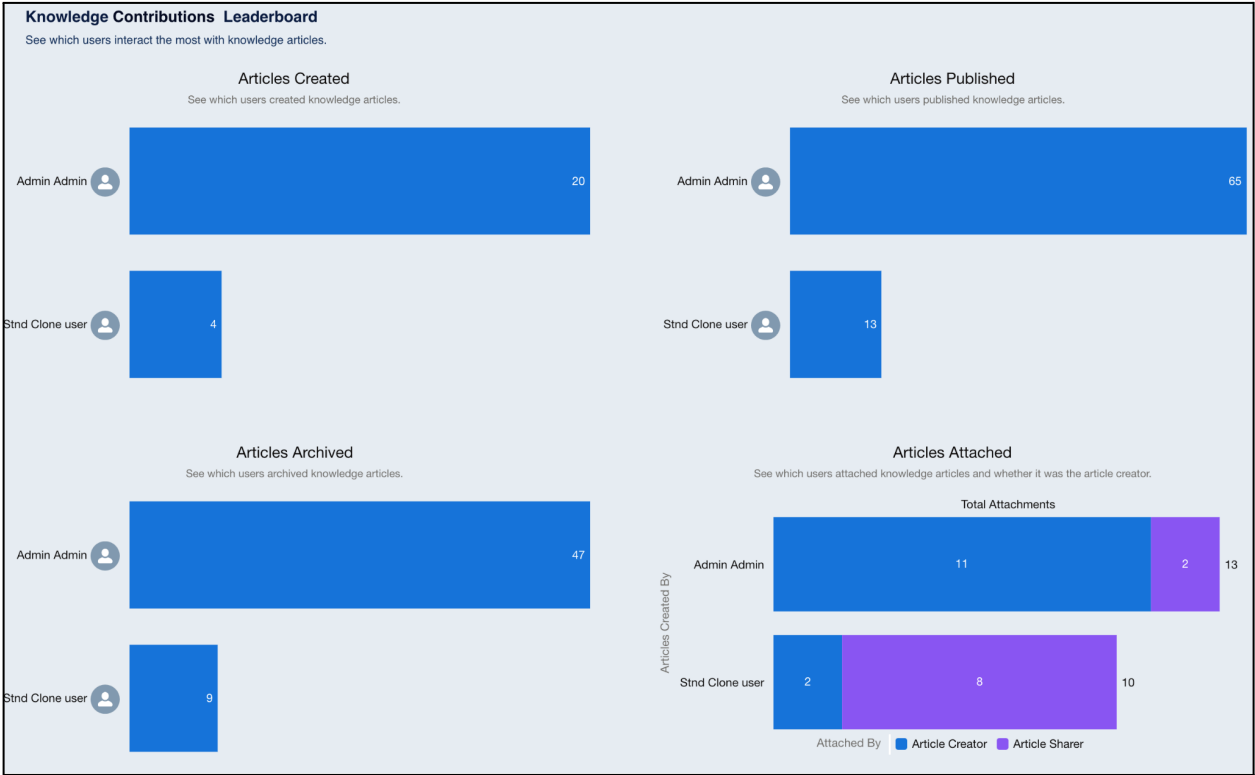
Knowledge Contributions Monthly Trends

See how users interact with articles over time.



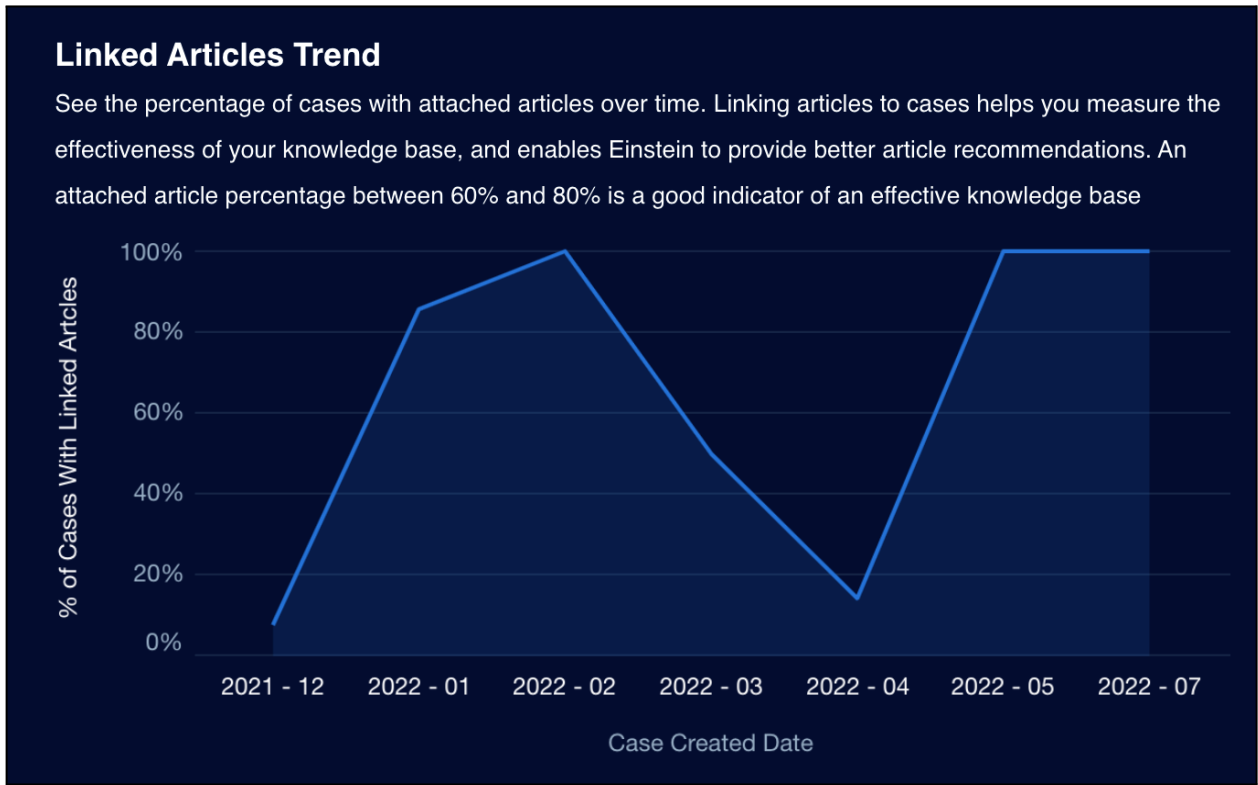
Knowledge Contributions Leaderboard

See which users interact the most with knowledge articles.



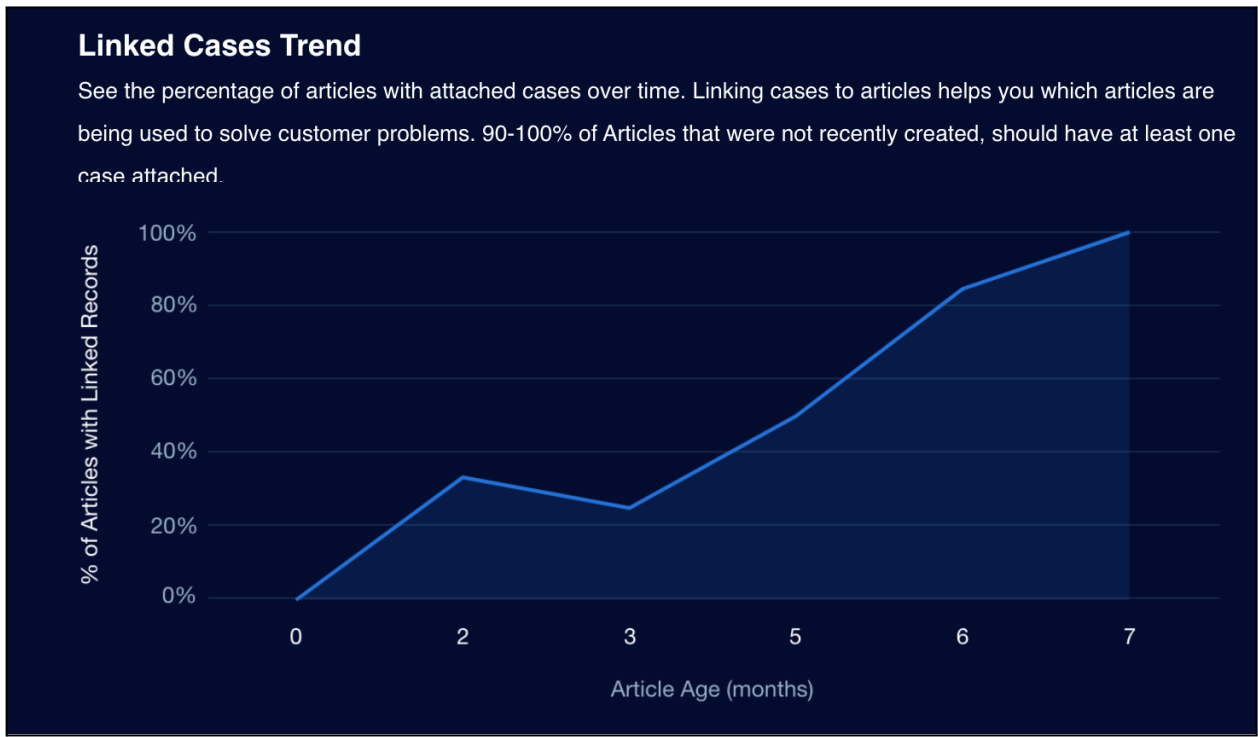
Linked Articles Trend

See the percentage of cases with attached articles over time. Linking articles to cases helps you measure the effectiveness of your knowledge base, and enables Einstein to provide better article recommendations. An attached article percentage between 60% and 80% is a good indicator of an effective knowledge base.



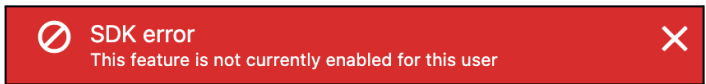
Linked Cases Trend

See the percentage of articles with attached cases over time. Linking cases to articles helps you identify which articles are being used to solve customer problems. It's recommended to have 90-100% of your articles that weren't created recently attached to at least one case.



Frequently Asked Questions

1. App installation throws error *“Your org does not currently meet minimum data requirements to proceed. Please fix the following issues before creating a 'Knowledge TCRM' Application: In the '[NODE NAME]' node, the '[FIELD NAME]' field doesn't exist, is deprecated, or isn't accessible to the Integration User.”*
 - a. Go to **Setup | Users | Permission Sets**
 - b. Click on **‘kcrma Analytics Integration User Permission’**
 - c. Click on **‘Object Settings’**
 - d. Click on the object that has the field that is causing the issue
 - e. Click **‘Edit’** and under **‘Field Permissions’** grant Read Access to the field
2. SDK error: This feature is not currently enabled for this user.



 - a.
 - b. Go to **Setup | Users | Permission Sets**
 - c. Click on **‘Analytics View Only User’** -> **‘Manage Assignments’**
 - d. Assign it to the user.
3. The ‘Knowledge Participation’ dashboard is missing
 - a. The ‘Knowledge Participation’ dashboard uses data from Knowledge Field History, if this functionality is not enabled in the organization, the dashboard won’t be installed.

Application Changelog

[1.4] - 2023-01-24

Added	• Date global filter to the 'Content Management' dashboard page. • Case Reason filter for the 'Knowledge Impact on Time to Close' Dashboard. • "Knowledge CRM Analytics Dashboard User" Permission Set.
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[1.3] - 2023-01-13

Added	• Warning message to the Configuration Page. • 'Articles in Draft State' report include it in the 'Content Management' dashboard. • 'Knowledge Participation Rate' widget include it in 'Participation' dashboard
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[1.2] - 2022-11-24

Added	• Date filter for the 'Attached Articles Per Object' table. • Post-Installation script that creates the Permission Set needed for the Integration User.
Fixed	• Installation issues in organizations that don't have Einstein Bots, Multiple Language or Knowledge Field History enabled.
Removed	• 'Top Knowledge Contributors' table from 'Knowledge Impact' dashboard.

[1.1] - 2022-09-27

Fixed	• CRUD/FLS Enforcement Vulnerability.
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[1.0] - 2022-08-05

- First version of the package