



Salesforce.com: Winter '12

Creating a Public Knowledge Base with Salesforce Knowledge



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Introduction

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

User Permissions Needed	
To install and customize the public knowledge base:	“Customize Application”

Overview

A public knowledge base is one of the channels where articles display to users or customers. Salesforce.com provides a package on the AppExchange so you can set up a public knowledge base that customers can browse anonymously without having to authenticate as registered users. This unmanaged package includes Visualforce pages that you can customize based on the needs of your organization.

Requirements

Before installing and configuring the public knowledge base package, make sure:

- Salesforce Knowledge is set up in your organization. Refer to the [Salesforce Knowledge Implementation Guide](#) for detailed information.
- The Translation Workbench is set up in your organization. See [Setting Up the Translation Workbench](#).
- You have a Force.com site already setup for your public knowledge base. Refer to the [Force.com Sites Implementation Guide](#) for more information. When setting up your Force.com site, note the following:

Do not configure the site home page or the site template. These settings are covered later in this guide.

Do not configure the public access settings for your site. These settings are covered later in this guide.

The public knowledge base does not support login and registration. Therefore, you do not need to enable these functions in the portal associated with your Force.com site.

Keep your Force.com site inactive until you complete all the steps in this guide.



Note: You can only display one category group per Force.com site.

Installation Overview

To install, configure and customize the public knowledge base:

1. [Install the Public Knowledge Base Package.](#)
2. [Configure the PKB Site Setup Object.](#)
3. [Configure the Force.com Site for Salesforce Knowledge.](#)
4. [Customize the Public Knowledge Base.](#)

Installing the Public Knowledge Base Package

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

User Permissions Needed	
To install packages:	"Download AppExchange Packages"

To install the public knowledge base package:

1. Go to the following URL on the AppExchange, and click **Get It Now**:
<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001gFH9EAM>
2. Enter your username and password, read the user terms, select the checkbox, and click **Continue**.



Note: If you are installing into a sandbox, replace the “www.salesforce.com” portion of the installation link with “test.salesforce.com”. Note that this package is removed from your sandbox organization whenever you create a new sandbox copy.

3. If the package is password protected, enter the password you received from the publisher.
4. Review the package items and click **Continue**.
5. Review the API access that package components have been granted to ensure they are acceptable.
6. Choose the `Grant access to admins only` security option, and click **Next**.
7. When prompted that the package is ready to be installed, make sure the `Ignore Apex test failures` checkbox is not selected, and click **Install**.

When you receive a message that the components contained in the package have been successfully installed, you are ready to deploy the package.

8. Click **Deploy Now** followed by **Deploy**.

To deploy your package at a later time, click **Deploy Later**. When you are ready to deploy the package, click **Your Name** > **Setup** > **View Installed Packages**, select **PKB Site Setup**, and click **Deploy**.

Configuring the PKB Site Setup Object

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

User Permissions Needed	
To configure the PKB Site Setup object:	“Customize Application”

When you install the Public Knowledge Base package available on the AppExchange, a new custom object or tab labeled PKB Site Setup is automatically created. This tab determines the category group and other information that displays on your public knowledge base site. To configure your PKB Site Setup tab:

1. Click the plus icon (+) next to the main tabs to view all tabs available to you.

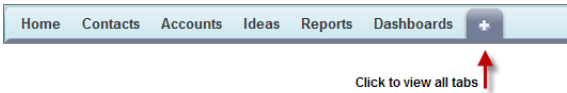


Figure 1: Viewing All Tabs in Salesforce

2. Click the **PKB Site Setup** tab.
3. Click **New**.
4. Specify the following information:

Field	Description
Name	The name of this PKB Site Setup tab.
Associated PKB Site Name	The Site Name of the Force.com site created for Salesforce Knowledge. To view the Site Name field, go to Your Name > Setup > Develop > Sites and click Edit next to the Force.com site for Salesforce Knowledge.  Important: There is no validation to ensure you enter the correct name. This field is case-sensitive.
Site Main Language	The default language for your site. The main site language should be the same as your default knowledge base language. See Setting Up Salesforce Knowledge
Site Secondary Languages	The other languages your knowledge base supports. These languages must be active in your knowledge base to support them on your public site. See Setting up a Multilingual Knowledge Base
Category Group	The category group you want to display in your public knowledge base. This field must match the Group Unique

Field	Description
	Name field. To view the category groups defined for your organization, go to Your Name > Setup > Customize > Data Categories and either hover over or double-click on the category group to display its unique name. Note the following: - You can only display one category group per Force.com site. - There is no validation to ensure you enter the correct unique name of a category group. This field is case-sensitive. - Only an active category group can be displayed in the public knowledge base.
Root Category	The first category you want to display in your public knowledge base site. This field must match the <code>Category Unique Name</code> field of the root category. All child categories under the specified root are displayed; however, sibling categories of the specified root are not displayed in the public knowledge base. The root must be a category within the category group specified in the previous field. To view the categories defined for your organization, click Your Name > Setup > Customize > Data Categories and select a category group. Then hover over or double-click on a category within the group to display its unique name. There is no validation to ensure you enter the correct root category name. This field is case-sensitive.
Cache Max Age	The amount of time (in seconds) the content delivery network (CDN) server caches the pages of your public knowledge base site. A value of zero (0) disables caching. CDN caching is automatically enabled on Force.com sites. We recommend setting this to 300 seconds (5 minutes).
Category Description <i>N</i>	The descriptions for the first-level categories located under the root category. Category Description 1 describes the first category under the specified root, Category Description 2 describes the next category, and so on. You can only provide descriptions for the first-level categories under the specified root category. You cannot provide descriptions for the children of the first-level categories.
Home Advertising Title	The text that appears on the home page of your public knowledge base site. This field is limited to 255 characters.

Field	Description
Home Advertising Text	The text that appears under the advertising title on the home page of your public knowledge base site. This field is limited to 32,000 characters.

5. Click **Save**.



Note: A Salesforce Knowledge site displays article records only. It is unrelated to public solutions, which are solution records that display to customers in a frame on your company's website.

If your site supports multiple languages, set up a site translation for each language.

1. Click the **PKB Site Setup** tab.
2. Click the name of the public knowledge base site you want to translate.
3. Click **New Site Translation** in the Site Translations related list.
4. Enter the name of the Force.com site you are adding a translation to. The current site is listed by default. You can use the lookup icon to find your site.
5. Select the **Language Code** for your translated site.
6. If necessary, enter your category descriptions.
7. If necessary, enter your home advertising title and text.
8. Click **Save**.

Once created, you can edit and delete site translations from the **PKB Site Setup** tab.

To translate your public knowledge base custom labels:

1. Click **Your Name > Setup > Create > Custom Labels**.
2. Click the custom label name you'd like to translate. The public knowledge base custom labels have the prefix **PKB_**.
3. On the **Translations** related list, click **New**.
4. In the **Language** drop-down, select the language you are translating into.
5. In the text box enter your translation.
6. Click **Save**.



Note: You must have the Translation Workbench enabled in your Salesforce organization to translate your public knowledge base custom labels. See [Setting Up the Translation Workbench](#).

The following example shows the location of the category descriptions, advertising title and advertising text on the home page of the public knowledge base site.



Figure 2: Example of the Public Knowledge Base Home Page

Configuring your Force.com Site for Salesforce Knowledge

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

User Permissions Needed	
To edit a Force.com site:	"Customize Application"

Once you configure the PKB Site Setup object, you need to configure your Force.com site for Salesforce Knowledge so it displays the correct active site home page and uses the new Apex classes and Visualforce pages that were included in the PKB package.

Selecting the Active Site Home Page

The active site home page is the page that users land on when they visit your site. The PKB package includes a default home page for Salesforce Knowledge.

1. Click **Your Name** > **Setup** > **Develop** > **Sites**.
2. Click **Edit** next to your Force.com site for Salesforce Knowledge.
3. On the Site Edit page:
 - Set the **Active Site Home Page** field to `knowledgeHome`. If you cloned `knowledgeHome` and modified the cloned version, enter the name of the cloned Visualforce page.
 - Set the **Site Template** field to `knowledgeLayout`.



Note: If you specify your own custom site template, the template needs to include a body section (see the `knowledgeLayout` page for reference). This ensures that the article type template (selected when setting up Salesforce Knowledge) displays properly in the public knowledge base. For more information about article types, refer to the Salesforce Knowledge Implementation Guide.

4. Click **Save**.

Configuring the Public Access Settings

The PKB package includes new Apex classes and Visualforce pages that need to be enabled on your public knowledge base site using the public access settings. You also need to make sure users can view the articles associated with the category group displayed on your site.

1. Click **Your Name** > **Setup** > **Develop** > **Sites**.
2. Click the site label of your Force.com site for Salesforce Knowledge.
3. Click **Public Access Settings**.
4. Optionally, set field-level security.
 - a. Scroll down to the **Field-Level Security** settings.
 - b. Click **View** next to the object that contains the fields to modify. Fields on article types are under the article type name in **Custom Field-Level Security**.
 - c. Click **Edit**.
 - d. Set the field-level security.
 - e. Click **Save**.

5. Enable the knowledge Apex classes:

- a. On the Profile Detail page for your site, scroll down to the Enabled Apex Class Access section, and click **Edit**.
- b. Move the KnowledgeController class to the Enabled Apex Classes column.

The public knowledge base does not support login and registration, so the login, registration, and password controllers should remain in the Available Apex Classes column.

- c. Click **Save**.

6. Enable the knowledge Visualforce pages:

- a. Scroll down to the Enabled Visualforce Page Access section, and click **Edit**.
- b. Move all the knowledge* Visualforce pages to the Enabled Visualforce Pages column.
- c. Click **Save**.

7. Select the category group to display in your public knowledge base:

- a. Scroll down to the Article Category Group Visibility Settings section, and click **Edit** next to the category group you specified when configuring the PKB Site Setup object.
- b. Make visible the root category that you specified when configuring the PKB Site Setup object.

For example, if all categories were specified as the root category, select the **All Categories** option. If a child category was specified as the root category, click the **Custom** option and move the category you specified as the root category to the Selected Categories column.

- c. Click **Save**.

8. If you are not going to customize your public knowledge base, activate your Force.com site for Salesforce Knowledge. Click **Your Name > Setup > Develop > Sites** and click **Activate** next to your site.

Otherwise, you can activate your site after you make the necessary customizations described in the next section.

Customizing the Public Knowledge Base

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

User Permissions Needed	
To clone and create Visualforce pages:	“Customize Application”

In the future, salesforce.com may release updated versions of the public knowledge base package for you to download and install. However, the more you customize your public knowledge base, the harder it will be to upgrade to new versions because you will need to re-implement your modifications. As you decide how much of the public knowledge base to customize, consider the trade-offs between customizability and upgrade costs. The more customized your site is, the more work it will be to upgrade the site to the latest version of the package.

Using the Cascading Style Sheet (CSS)

While salesforce.com does not support or guarantee effortless upgrades for the public knowledge base package, below are some guidelines you should consider before you make any changes to the CSS:

- Complex stylesheet and Javascript changes that modify the spacing and layout of your site (such as adjusting the font size, page margins, and padding of objects) require you to re-test your site after you install any new version of the public knowledge base package. Testing your site helps ensure that your complex stylesheet and Javascript changes are compatible with the new features and changes available in the new package.
- If you need to make style sheet changes, we recommend cloning KnowledgeCSS and making your changes to the newly cloned file. This prevents your style sheet changes from being overwritten if you upgrade the public knowledge base package in the future.

1. Click **Your Name** > **Setup** > **Develop** > **Pages**, click the **knowledgeCSS** page, and then click **Clone**. Provide a new name for the CSS page and click **Save**.
2. In the knowledgeLayout page, replace “KnowledgeCSS” with the name of the cloned CSS file.

Click **Your Name** > **Setup** > **Develop** > **Pages**, and click **Edit** next to the **knowledgeLayout** page. Replace “KnowledgeCSS” with the name of the cloned CSS file.

3. Make the necessary changes to the cloned CSS.

Customization	Action
Change the color of the Printable View hyperlink	Since Winter '10, articles have a Printable View link. If you are using an older package, you must add the Printable View CSS style to make it visible on the article detail page. Add the following style in your CSS file: <pre>.pkbFullWidthInner .configLinks { color: #666666; }</pre>
Replace the logo in the upper left corner of the public knowledge base site	Search and replace “insertYourLogo” in the CSS file.

Customizing the Visualforce Pages

To customize your site beyond what is supported by the CSS, you can modify the Visualforce pages (KnowledgeHome, KnowledgeProduct, KnowledgeSearch, and KnowledgeLayout) and Apex controller (KnowledgeController) that came with the public knowledge base package. However, we recommend you make copies of these pages and controller first and then modify the copies so your changes do not get overwritten when you install a new version of the package. Do not modify the Visualforce pages or controller directly.



Note: When you install a new version of the PKB package, you must have a migration strategy to re-implement your changes into the new pages and controller that come with the updated package.

To copy and modify the Visualforce pages and controller:

1. Click **Your Name > Setup > Develop > Pages**.
2. Select the name of the Visualforce page you want to modify.
3. Click **Clone**.
4. Make the necessary changes and give the page a unique label and name (the label and name can be the same, but must be different than other pages). Click **Save** when finished.

For information on modifying Visualforce pages, see the Visualforce Developer's Guide available in the Salesforce online help.

5. Create a new Apex class based on KnowledgeController, and enter the names of the newly cloned Visualforce pages in this new class:
 - a. Click **Your Name > Setup > Develop > Apex Classes**, and edit the KnowledgeController class.
 - b. Click **Download**, and then open the file in your choice of editor (such as Notepad or Eclipse).
 - c. Make the following changes:
 - In the first line of the file, replace *KnowledgeController* with a unique name for this new class.
 - Replace the name of the Visualforce pages (KnowledgeHome, KnowledgeProduct, KnowledgeSearch, or KnowledgeLayout) with the names of the newly cloned versions.
 - d. Copy the contents of the file, paste the contents into a new Apex class, and save your changes.
6. Edit the cloned Visualforce page you created, and replace *KnowledgeController* with the name of the new Apex class.
7. Enable your cloned Visualforce pages:
 - a. Click **Your Name > Setup > Develop > Sites**.
 - b. Click the label of your Force.com site for Salesforce Knowledge.
 - c. In the Site Visualforce Pages section, click **Edit**.
 - d. Move your cloned Visualforce page to the Enabled column.
 - e. Click **Save**.
8. If you cloned and modified the KnowledgeHome page, specify the newly cloned page in the Active Site Home Page field.
9. Activate your Force.com site for Salesforce Knowledge. Click **Your Name > Setup > Develop > Sites**, and click **Activate** next to your site.
10. Test to make sure you have successfully overwritten the standard page. From your Force.com site, navigate to the new cloned page and make sure it appears instead of the standard page that you overwrote.