

Welcome to ASU Connections Knowledge & Article Management Training

Technical Assistance email: salesforce.support@asu.edu ASU Connections: https://salesforce.support@asu.edu

This guide will help you create and manage Knowledge Base Articles.

Contents

Welcome to ASU Connections Knowledge & Article Management Training
Introduction
Key Terms2
My ASU Integration
Customize Your Tabs
The Article Approval Process Workflow
From Draft to Published – Working Articles through the Process
Initial Creation and Submission Article Creator
Content Review & Collaborative Creation Functional Group(s)15
Format Review ASU Standards & Communications Team19
Final Step - Publishing Review Knowledge Manager Team19
Editing an Article after it is Published20
Article Writing Best Practices
Before and After Example:
Before example (internal)25
After example (published version)26



Introduction

The goal of the ASU Connections implementation is to enhance the student experience across the ASU community. ASU Knowledge provides students with a centralized, easily accessible, 24-7 self-service, and consistent experience when seeking help or information specific to all college and business units at ASU.

Key Terms

The following are some terms you will hear referenced frequently throughout this document.

Terms	Definition
Functional Group	The Functional Group is a department or college that will own the Article
Category Group	Category Groups corresponds to the My ASU tab/page: Category Groups = Finance Service Center Campus Service
Categories	Categories corresponds to the informational box within each Category Group in My ASU tab/page: Category Group = Finances Categories = · My ASU Account Charges · My ASU Financial Aid & Scholarships
Channels	Channels for the article in relation to the article audience: Customer: Displayed in the Authenticated (My ASU – Service Center) Knowledge base Public Knowledge Base: Article will be available to unauthenticated users
Approval Process	 The Article Approval Process flow has 4 components, it is integrated into the stages from a Draft Article through Publishing the Knowledge Article Draft Creator Content Reviewer Format Reviewer Publish Reviewer



My ASU Integration

Integrating Knowledge with the My ASU student portal is an integral part of the relationship management with the student. By tagging Knowledge articles in ASU Connections to My ASU Category Groups and Categories within them that correspond to particular My ASU tabs/pages and boxes, students have the ability to:

- See quick information and a "Top 5" in association to knowledge articles, as related to particular areas within My ASU
- Search the Knowledge Base for articles, for answers to common questions and issues
- View a list of top articles

The below image shows one of the informational, icon pop-outs that students are able to hover over, within My ASU boxes, and be shown the following data as pulled in from Salesforce:

- Articles related to areas within said My ASU box (Category)
- The top 5 articles that are tagged in Knowledge, to said My ASU tab and box





• Students are able to click on a suggested article from the icon pop-out, as shown below, as well as search the Knowledge Base for other articles.

🗲 🏔 https://asu.secure.force.com/kb/articles/FAQ/What-is-the-d	difference-between-an-official-and-unofficial-ASU-transcript 🏫 🕫 🕻 🕏 🛪 Google 🔎 🔯 🛪
) Most Visited 🧧 EDUCAUSE Homepage 🥑 Getting Started 🌄	Suggested Sites 🗍 Web Slice Gallery
ARIZONA STATE UNIVERSITY	ASU Home My ASU Colleges & Schools Map & Locations Directory Mathew SIGN Search ASU Search ASU Search ASU
M y A S U . I My ASU Home	
Related Articles	< Back to search results.
What types of scholarships are available? How do I transfer to ASU? How do I apply for financial aid? Where do I go to get my honor cords for araduation?	What is the difference between an official and unofficial ASU transcript?
Graduation? How does a grade of W (withdrawal) affect my GPA? Search by Category	Information Functional Registrar Group
Academics No Filter Finances No Filter	Question What is the difference between an official and unofficial ASU transcript? Answer An official transcript is a copy of the student's permanent academic record issued by the University Registrar. It displays all courses taken for credit at ASU and includes all grades received. Official transcripts are signed and dated by the University Registrar and displays the ASU seal. Official transcripts are not issued for students with outstanding financial obligations to the university. ASU cannot send official transcripts varies are mail or fax.
Campus Services No Filter Can't find what you need? Contact Us	Unofficial transcripts are not signed or dated by the University Registrar and do not display the ASU seal. Both official and unofficial transcripts can be requested online: 1. Login to My ASU 2. Click on Transcripts & Test Scores in the My Classes box
	Click on the type of transcript you wish to request Feedback Was this article helpful?
	Yes No



Customize Your Tabs

In order to create knowledge article in Salesforce, you must have an "Article Management" tab. To do this, follow these steps.

1. Click on the far right button / blue face and select "My Settings"



2. Click on Customize My Tabs, on the right bottom side of the screen. When tab selection complete click "Back to ASU Service"



3. Select Article Management in the Available Tabs box > click Add > click Save

ustom App:			
Knowledge	•		
Available Tabs Academic Groups Bomgar Issues Bomgar Issues Bomgar Sessions Bomgar Settings Campaigns Cases Contacts Dashboards Documents Files	Add	Selected Tab Home (default) Chatter Knowledge Article Management	Up Up Own



The Article Approval Process Workflow

Within the lifecycle of an article, there are many steps and approvals that need to take place. To ensure the necessary parties review, approve and own an article for publication, the further below approval process has been designed and configured. This model also provides an Approval / Rejection history and tracking through each of the following stages of the process.

- Draft Creation by the Article Creator
- Content Review by Content Approver(s)
- Format Review by a Format Approver(s)
- Publishing by the Knowledge Management Team (University Provost)





From Draft to Published – Working Articles through the Process

Below are the outlined stages and steps, to move an article from a submitted draft to a published, live article in the knowledge base.

Initial Draft Creation | Article Creator

- Click on Knowledge Tab and *complete a general search* within the current *Knowledge Base*, for both Published and Draft, to ensure the article does not already exist.
- 2. If the article does not already exist, Click on "Create Article" and select FAQ You will be taken to the Article Management tab and will see the Article Edit | New Article form

ASU	Q Search Salesforce	? 😐
Knowledge	▼ +	
Articles 1 My Draft	Search Knowledge Create Article	
1		
	V Published Published Reset Sort by: Published Date +	
	r Return Email Address The following are steps how to update your return email address in Salesforce. This is the address you would like to define when sending email inside of Salesforce. The recipient will respond to this email address for replies to your messages. New + 000013456 + FAQ + Draft + Last Published 3/4/2016	

OR Go Directly TO Article Management tab, and search. If article does not exit click New

	ASU	Q Search Salesforce
ASU	Article Managem 🔻 🕇	
Knowledge	View © Draft Articles Assgned To Me Published Articles Archived Articles Archived Articles Archived Articles Action Article Title + Type Assl A	_
A Home	Go Clear Filter Draft Articles	
Chatter	Campus Services Ny ASU Devit2Devit Academics Ny ASU Classes	
🛄 Knowledge	Finance Recordedge	
Dashboards	ZALINIVE ALIIIVE Validation Status	
🔟 Article Management	-No Filter- Clear Filters 0 Selected I	



- 3. Create article In *Article Management* you will complete the *Article Edit | New Article* form. Enter the appropriate information / populate the following fields:
 - a. Title (complete this field, then press Tab)
 - b. URL Name (auto-populated by the above "Tab")
 - c. Validation Status = Draft (this field is updated automatically, within the approval process)

ASU	Q Search Salesforce
* 🖆 (Draft) 🕂	•
New Article	
Save & Close Save Cancel Assign	Publish Preview required fields
Article Assignment Assigned To Nadine Ursta Assigned By Nadine Ursta Instructions - Assignment Due _ Date Article Properties Publishing Status Draft	Article Number Tile URL Name Summary Validation Status Draft Draft Draft Draft Format Review
Type FAQ Article Number Created By Last Modified By Nadine Urista	Functional Group Ontent Review Approved Published Information Published B I U Source Information Image: Source
Categories Campus Services No Category Edit	Format + Font + Size + A+ Q+
Academics No Category Edit	

*Note: Please remember when copying/pasting it is best to use Notepad (PC) or TextEdit (Mac), for plain text content – then format the content.

OR Click on

 I_{x}

(remove format tool) to remove any formatting from the original source

*Note: Bottom of *Article Edit | New Article* form the Article Expiration Date will be auto-set (creation date + 180 days) upon the article being published (final stage).

4. Select your Functional Group - the group that will own the article



You will also find particular features in the toolbars of the content areas such as:

Insert Smart Link (Used to Link existing Articles to your Article) & Link

Information	
Functional Group 👔	None •
Information	Image: Source Image:
	E 3 = 1 Format → Font → Size → Insert a Smart Link

Link Article	×
Link Article Target	
Published •	
how to	Q
Inter to common Latence in Upport 15207 - PM2 How to Authorize WASU Gest Accounts at Once using Google Multiple Sign-In (000011574) - How to Psias End the Elakobaci (000011542) - FAG How to Psias End the Elakobaci (000011542) - FAG How to Download Shill Edge (000011527) - FAG How to Access Your Blackboard Course (00001157) - FAG How to Access Your Blackboard Course (000011547) - FAG How to Access Your Blackboard Course (000011547) - FAG	FAQ
Selected Article /articles/FAQ/How-to-Access-Your-Blackboard-Course?id=kA1d00000 Go to Article	
ОК	incel

Functional Group		
	None	
Information		
	Pource ← → B I U S I _x = ↔ ≥ ∞ ∞ № □ □ □ = ±	Ξ
		-



Information	
Functional Group 🕕	None
Information Functional Group (1) Information	None V Source A B I U S Ix II A B C II E E E Format - Font - Size - A I I Embed Multimedia Content



Complete Articles Properties on Left side pane of Article Edit | New Article template

5. Scroll up, and review the Article Properties in the left pane

* <u> (</u> Draft)	+
New Article Edit	cle
Save & Close Sa	ave Cancel Assign Publ
Article Assignment	
Assigned To	Nadine Urista
Assigned By	Nadine Urista
Instructions	
Assignment Due Date	
Article Properties	
Publishing Status	Draft

6. Click on Edit next to the *Categories section* for your functional group. This is where an article will be tagged to particular attributes, for the My ASU integration

Date		Select category from Finances - Google Chrome
Article Properties		https://cs9.salesforce.com/category/datacategorypicker.apexp?categoryGroupId=0D1K0000004CfY
Publishing Status	Draft	Available Categories: Selected Categories:
Type Article Number	FAQ	Expand All Collapse All All > My ASU Financial Aid and Scholarships
Created By Last Modified By	Derek Trucks	All My ASU Account Charges Add> Addd> Add> Add>
Categories Finances	No Category	
Campus Services	No Category Edit	
Academics	No Category Edit	
Channels	Internal App Partner Customer Public Knowledge Base	OK Cancel



Category Groups and Categories

Category Group = corresponds to the *My ASU tab/page* Categories = corresponds to the informational box on the tab/page

Category Group = Finances Categories:

- My ASU Account Charges
- My ASU Financial Aid & Scholarships

Category Group = Campus Services Category:

• My ASU Devil2Devil

Category Group =Academics Categories:

- My ASU Classes
- Herberger
- W. P. Carey



11 © Arizona State University. All rights reserved. V8



7. Confirm / select the **Channels for the article** (in relation to the article audience)

Channels

Categories Campus Services	No Category	Edit
Academics	No Category	Edit
Finances	No Category	Edit
Internal Knowledge	No Category	Edit
Exclusive	No Category	Edit
Channels	Internal App Partner Customer Public Knowledge Base	

- Internal App (default)
- Partner : No Check
- Customer: Is to ensure it's displayed in the Authenticated (My ASU – Service Center) Knowledge base
- Public Knowledge Base: **MUST** be checked. The public (article will be available to unauthenticated users)
- 8. Click **Save**, at the top of the page.
- 9. Once you are ready to submit the draft article, Click Submit for Approval, then OK

ASU	Q Search Salesforce
* 쑲 Nadine 2nd Test A	+
Madine 2nd Test A	rticles
Save & Close Save Cancel	Submit for Approval Assign Preview

The page at https://asuuat.cs9.	my.salesforc	e.com says: ×
Once you submit this record for approva edit it or recall it from the approval proce settings. Continue?		
	ок	Cancel



10. Scroll down to *Approval History*, and you will notice the draft article has entered the approval process and is currently in the Content Review stage, with a date/time stamp and an Overall Status = Pending.

Approval History	Recall Approval Request		
Action		Date	Status
Step: Content Review & Collaboration (Pending for fire	st appro	oval)	
Reassign Approve / Reject		10/6/2014 3:30 PM	Pending
Approval Request Submitted			
		10/6/2014 3:30 PM	Submitted

11. Did you submit the article in error and need to *recall the approval request*? If so:

- a. Click Recall Approval Request at the top of Approval History
- b. Enter comments in the window and click Recall Approval Request

Approval History	Recall Approval Request					
Action	Date	Status	Actual Approver	Assigned To	Comments	Overall Status
Step: Content Review & Collaboration (Pending for first	approval)					🕒 Pending
Reassign Approve / Reject	10/6/2014 3:30 PM	Pending	Knowledge: Financial Aid	Knowledge: Financial Aid		
Approval Request Submitted						
	10/6/2014 3:30 PM	Submitted	Jill Arseneault	Jill Arseneault		

Recall Approval Request When Will Financia « Back to FAQ: When Will Financial Aid	Disburse?		Help for this Page 🤗
Please enter comments to remove this Recall Approval Request	Recall Approval Request Cancel		
Comments	ill Financial Aid Disburse?	Created By <u>Jill Arseneault</u>	ø
	Recall Approval Request		

c. Action = Initial Submission | Article Creator

Expectations after action

- Validation Status = Content Review
- Triggered email sent to the appropriate functional group queue, to review and/or collaboratively add article content
- Lock the article from being edited



12. You can return to Article Management or Knowledge at any time, to review and preview articles

ARIZONA S UNIVERSIT	State Search	Search	
Home Chatter Article Manager	ment Knowledge +		
View	My Draft Arti	cles	Туре
Archived Articles	Edit Preview	(Sample) I own property in Arizona; doesn't that make me a resident?	FAQ
Find in View Go <u>Clear</u>	Preview	When Will Financial Aid Disburse?	FAQ
Filter Draft Articles Finances No Filter Campus Services No Filter Academics No Filter Validation Status No Filter <u>Clear Filters</u>		Click a title, to view details and the article Approval History.	
Home Chatter Article Manageme		Search	
Articles	Q Search Knowledge	Create Article	• 0
My Draft	Draft Finances *	Campus Services Academics All Article Types Validation Statu	S 🔻
	Published ✓ Draft	Click a title, to view details and the article Approval History	ied Date 👻
		sburse? article to answer question around aid disbursement. It Review + Assigned to Derek Trucks + No Assignment Due Date + Last Modified 11/11/2	013

(Sample) I own property in Arizona; doesn't that make me a resident?

000001003 • FAQ • Content Review • Assigned to Derek Trucks • No Assignment Due Date • Last Modified 11/9/2013



Content Review & Collaborative Creation | Functional Group(s)

Once the article creator has submitted the article into workflow, it moves into the Content Review stage. An email was sent to your functional groups content approver(s) to review and/or collaboratively add article content.

- 1. Article Approvers, you will receive an email notifying you that an article is pending your review.
- 2. From the email click the article link or go directly to Article Management. Locate the article to be reviewed. Click on the title.

ASU	Q 5e	earch Salesforce			
≰ Article Managem	▼ +	•			
View ● Draft Articles Assigned To Anyone ▼		Articles			
 Published Articles Archived Articles 	New Assign	Columns V	-		
Find in View	Action Edit Preview	Article Title <u>Nadine 2nd Test Articles</u>	FAQ	Assigned To Nadine Urista	Assignment Details Instructions: Assigned By: Nadine Urista
Go <u>Clear</u>	Edit Preview	Adine Test Article	FAQ	Nadine Urista	Instructions: Assigned By: Nadine Urista
Filter Draft Articles	Edit Preview	Installing Desktop Chatter	FAQ	Helen Lueck	Instructions: Assigned By: Helen Lueck
Campus Services No Filter	Preview	How do i upgrade to a Pitchfork ID?	FAQ	Matthew Keller	Instructions: Assigned By: Matthew Keller
Academics No Filter	Preview	Are Study Abroad Programs Competitive?	FAQ	Carrie Herrera Ni	Instructions: Assigned By: Carrie Herrera Niese
Finances No Filter	Preview	Blackboard Maintenance	FAQ	Susan Barrett	Instructions: Assigned By: Susan Barrett
Internal Knowledge No Filter	Edit Preview	What Are the Eligibility Requirements for Study	FAQ	Carrie Herrera Ni	Instructions:
Exclusive -No Filter Validation StatusNo Filter Clear Filters	 I-10 ■ 0 Selected 	-		≪	

*Note: If the article in question is not seen, use the filters in the View section on the left to locate it

- 3. Review the article properties and content for validity and accuracy, for said functional group and topic.
- 4. Will you be rejecting the article?
 - a. If no, continue to 5
 - b. If yes, skip to 10
- 5. Do you need to make any changes to the article? If so:
 - a. Click Edit
 - b. Make the necessary changes
 - c. Click Save & Close
 - d. Click on the article title, to continue / move towards approving this step



- 6. Is further content and/or review needed? Will you be assigning the article to another person on your team to add and review content?
 - a. If yes, continue to 7
 - b. If no, skip to 8
- 7. To assign the article to another person.
 - a. Check the box next to the article you want to assign to another user. Then Click Assign.

All Draft Articles					
New Assign	Columns V				
Action	Article Title	Туре	Assigned To	Assignment Details	
Edit Preview	Nadine 2nd Test Articles	FAQ	Nadine Urista	Instructions: Assigned By: Nadine Urista	

b. Assign to as user. Click on the magnifying lens to search for them.

Assign Articles		×
Article Title Assign To	Nadine 2nd Test Articles	
Instructions	1	
Due Date		
Send Email		
	OK	

- c. Provide instructions for the user.
- d. Assign a due date if necessary
- e. Check send email to notify the user that you have assigned the article to them.



- 8. Is further cross-functional content and/or review needed? Will you be reassigning the article to another functional group to add and review more content?
 - c. If yes, continue to 9
 - d. If no, skip to 10
- 9. To reassign to another functional group
 - a. Scroll down to Approval History section
 - b. Click on Reassign, within Step: Content Review

Approval	History	Recall App	roval Request	
Action		1	Date	Status
Step: Con	tent Review & Collaboration (Pending for first	approval)		
Reassign	Approve / Reject		10/6/2014 3:30 PM	Pending
Approval	Request Submitted			
			10/6/2014 3:30 PM	Submitted

c. Find and select the functional group queue, to be reassigned to

Reassign Approval Reques When Will Fina	incial Aid Disburse?		Help for this Page 🥹
ŧ		Search for Queue ~ salesforce.com - Unlimited Edition - Goo	ogle Chrome
Reassign Approval Reque	est Reassign Approval Request Cancel	https://asuuat.cs9.my.salesforce.com/_ui/com	nmon/data/LookupPage?lkfm=editPage&lknm @
	When Will Financial Aid Disburse? Queue Knowledge: Financial Aid SBS Please review for the content to be provided by SBS.	You can use "** as a wildcard next to other c < <u>Clear Search Results</u> Search Results	
	Reassign Approval Request Cancel	Queue Name Knowledge Format Approval Knowledge: Academic Technologies Knowledge: Admission Services Knowledge: ASU Online	Select the Functional group queue the article needs to be reassigned to.

- d. Enter comments for the "next" functional group.
- e. Click Reassign Approval Request *This concludes the Reassign for Content Review, and triggers an email to the "next"

functional group queue members. Revert back to Step 1, of Content Review stage.



10. To approve or reject the article

- a. Scroll down to the Approval History section
- b. Click on Approve / Reject

Approva	History	Recall Approval Request	
Action		Date	Status
Step: Cor	ntent Review & Col	aboration (Pending for first approval)	
Reassign	Approve / Reject	10/6/2014 3:30 PM	Pending
Approval	Request Submitte	I Contraction of the second	
		10/6/2014 3:30 PM	Submitted

- c. To Reject
 - 1. Enter comments regarding the rejection
 - 2. Click Reject

:e			? 🙂
🖄 Nadine 2nd Test A	🞽 Nadine Test Artic	FAQ: Nadine Test	+ *
FAQ: Nadi	ne Test Article		•
Title Functional Group Validation Status Summary	Nadine Test Article Provost Office Content Review		
Comments	test		
	Approve Reject C	Cancel	

*Rejecting an article will send an email to the creator/submitter and unlock the article

- d. To Approve
 - 1. Enter comments regarding the approval
 - 2. Click Approve

Title	When Will Financial Aid Disburse?
Functional Group 🤣	Financial Aid
Validation Status	Content Review
Summary	Financial Assistance FAQ
Comments	Content looks good on the <u>SBS</u> side.
	Approve Reject Cancel



Format Review | Functional Group(s)

Once the article has been approved by the Content Approver it moves into Format Review. An email will be sent to the Format Approver to review formatting and ASU standards. During format review, the article will be reviewed to make sure that it adheres to the ASU Writing Style Guide and ASU communication standards. If additional edits are needed or the article does not it will be rejected back to the content review status with notes as to why it was rejected.

Final Step - Knowledge Management Team

Once the article has been approved by the Format Approval the article moves into final review. An email will be sent to the Knowledge Manager to provide final review of the article and to publish the article.

Expectation after Publishing Approval

- 1. Triggered email sent to members of the Functional Group informing of publication
- 2. Article Expiration Date auto-set to: creation date + 180 days
- 3. Article published / available online to the appropriate Channels and audiences
- 4. Article can also be shown as published or updated in "Knowledge" tab.

arizona state university
A knowledge article you created has been approved and published.
View article: https://asuknowDEV.cs18.my.salesforce.com/ka1110000004CaP
ASU

ARIZONA ST UNIVERSITY	ATE Search Search	
Home Chatter Article Manageme	ent Knowledge +	
My Draft	Q Search Knowledge Published • Finances • Campus Services • Academics • All Artic Reset	Create Article Create Article
	Articles When Will Financial Aid Disburse? Financial Assistance FAQ article to answer question around aid disbursement. Updated + 000001005 + FAQ + Published + Last Published 11/11/2013	Sort by: Published Date *



Editing an Article after it is Published

Below are the steps to edit an article after it has been published in the knowledge base.

- 1. Click on the Knowledge tab
- 2. Complete a search for your article within the current Knowledge Base and be sure you are searching the Published articles.



3. When you locate the article you want to edit, Click on the drop down arrow next to your article and Click Edit.



4. Determine if you want to keep the article visible by students until you complete the new version or if you want to remove the current article until the next version is complete.

Edit Article	×
This article is published. While you edit the draft do you want to: Edit Article Keep the article published. Agents can view the original article while you	
Schep the article published. Agents can view the original article while you work on the draft. ○ Remove the article from publication. Agents cannot view the original article while you work on the draft.	
OK	



- 5. Complete your edits to the article and then Click Save.
- 6. Once you are ready to submit the draft article, Click Submit for Approval, then OK.

ASU	Q Search Salesforce
* 쑲 Nadine 2nd Test A	+
Madine 2nd Test Ar	ticles
Save & Close Save Cancel	Submit for Approval Assign Preview

The page at https://asuuat.cs9.my.salesfor	ce.com says: ×
Once you submit this record for approval, you might n edit it or recall it from the approval process depending settings. Continue?	
ОК	Cancel



Article Writing Best Practices

How to write Knowledge articles

When writing a knowledge article, you want to be clear and concise; factual and engaging all at the same time. To help make the balancing act of creating knowledge articles a little easier, we recommend following the "**Rules to live by**" and following the "**ASU Writing Style Guide**" as listed below:

ASU Writing Style Guide (https://brandguide.asu.edu/identity-standards/writing-style-guide).

When creating articles, please remember to adhere to AP Style outlined in the guideline.

Rules to live by

- 1. Use student-centric language.
- 2. Always proofread and edit your post before submitting.
- 3. The title of the article should be in the form of a question or brief statement.
- 4. Write original, useful content. Base content on student's most frequently asked questions.
- 5. Be concise. Answer the question within the first two sentences in the body of the article. If applicable or helpful to the student, provide supplemental information in the last sentence of the article such as additional details, websites and contact information. For example: To learn more, please visit the <u>ASU</u> website. If you have additional questions, please contact the "said name" at xxx-xxx-xxxx or by email at xxxx@asu.edu.
- 6. Be specific, both in title and content of the article. **For example**, specify undergraduate or graduate if there are differences in the answer or process.
- 7. Only one question should be included per article. Incorporate other relevant terms within the body of the article.



Write for the students

We want Knowledge to be usable by all ASU students. This means we're writing for a general audience, rather than one very familiar with ASU. When writing an article, its best to assume the student you're writing for is new to the university and this may be their first day.

Article functional group

Articles are categorized under a Functional Group so that they can be monitored by the appropriate unit(s). Articles will be assigned to one main "Functional Group" and associated to Categories monitored by the Knowledge Manager. This hierarchy helps tag articles appropriately and will deliver targeted search results.

Pick a good title

An article's title should try to describe what the article is about. The important thing is for the first few words to be as understandable as possible, filled with keywords that are important. This will allow students to recognize what the article is about and click confidently. In addition, a title should follow these guidelines:

- Be specific and be sure to identify the department/unit in the title as necessary.
- Try to vary the way you name articles. Don't use the same verbs or phrases in every title. Don't be afraid to be creative.
- Be concise with your title. Search results will display up to 99 characters. Your title can be longer than this if necessary, but make sure your important keywords are in the first 99 characters.

Remember that the entire explanation doesn't have to go into the title. You can use the answer field of the article to provide the student with the specific information about the topic.

Organize the article effectively

The general idea here is to try to develop the information from simple to complex while trying to keep the details needed by most students near the top. So a simple, common solution would usually come before a complex or specific solution. Articles should be comprehensive, so it's important to use descriptive subheadings to help students find the part of the article that they need.

Make step-by-step instructions easy to follow

The main thing to keep in mind when writing step-by-step instructions is to be careful to include all the actions needed to complete the task. If, for example, you have to click "OK" after selecting a preference in order to move to the next step, be sure to include clicking OK as part of that step. Some additional things to consider:

- There may be multiple ways to achieve a result. We should always pick the most student-centric way.
- Use full sentences when describing each step or how to access more information.
- Include expected results when giving instructions (Example: Click OK and the window will close).

ARIZONA STATE UNIVERSITY

Make your writing engaging

Using repetition and a conversational tone are some of the techniques we can use to engage students. These techniques, which are listed below, all aim to get your brain to pay attention by recreating what this interaction would be like in-person. When we do that, information is easier to understand and remember.

- **Conversational writing style** Use an informal, active style similar to the way you'd speak to someone in person.
- **Humor and emotion** Using humor is great but it's sometimes hard or impossible to localize. Emotions like surprise might be easier to include.
- **Multiple learning styles** Just like in school, students learn differently. Also, everyone benefits from seeing the same content expressed in multiple ways.
- **Repetition** When you explain something in a different way with different media, you're also, obviously, repeating it which is another good way to help student remember what's important.
- **Images and video** Using images and videos to explain things can be a great addition to include with your text since you can't be there in person with the student to guide them through the process.

Common Formatting Issues

Below are formatting items that are most commonly reviewed and corrected in the review of Knowledge articles.

- Use the default font.
- Do not underline text or change the font color.
- <u>Caution</u> If you are pasting content, click on (remove format tool) to remove any formatting from the original
- Number stepped instructions and use bulleted lists.
- Use the second person "you" or "your" – instead of "student."
- Use full names in the first reference, before using an official abbreviation or an acronym.
- Spell out numbers one-nine, use figures for numbers 10 and higher.
- When writing about My ASU, the letter 'y' in My is lowercase. There is also space between My and ASU.

- Use the appropriate name of the box you are referencing in My ASU (i.e. My Classes, My Programs, Account Charges, Financial Aid and Scholarships).
- Do not use "and/or" to indicate alternatives. Rewrite the statement using more precise writing. See ASU Branding in Content. Replace "and/or" with "and" since it will encompass the "or."
- Hyperlink names of websites instead of using "click here." Link URLs and email addresses. If you are referring students to a site such as, https://students.asu.edu/, you can friendly hyperlink the URL to show <u>ASU Student website</u>
- Use official names of buildings, which can be found on ASU Maps (<u>http://www.asu.edu/map/interactive/</u>).



Before and After Example:

Before example (internal)

Functional Group	Orientation and Family Programs
Question	How do I pay the enrollment deposit?
Answer	There are three ways you can pay your enrollment deposit. Online Payments online are accepted through www.my.asu.edu. in the priority task list in MY ASU, you will see a link to Pay Your Enrollment Deposit. By mail: Checks made out to "Arizona State University" can be sent to: ASU New Student and Family Programs, PO Box 872201, Tempe, AZ 85287-2201. In person: Cash and check payments are accepted by the New Student and Family Programs office, located at MU 14. Our office hours are Monday through Friday, 8 a.m5 p.m.
Article Expiration Date	5/31/2015





After example (published version)

formation	n	
Functional Group	· · · · · · · · · · · · · · · · · · ·	
Question	How do I pay my enrollment deposit?	
Answer	There are three ways you can pay your enrollment deposit:	
	 Online: Payments online are accepted through your My ASU account. Under your Priority Tasks in ASU, you will see a link to Pay Your Enrollment Deposit as shown below, along with links for the r steps after you pay the deposit. 	
	Priority Tasks	
	Important Next Steps	
	PAY ENROLLMENT DEPOSIT	
	The first step for admitted freshmen is to pay an enrollment deposit. See details.	
	Your remaining balance for Fall 2015 is \$300. Pay your enrollment deposit for Fall 2015	
	Once you pay your deposit, you must:	
	SELECT YOUR HOUSING	
	SIGN UP FOR ORIENTATION	
	Please note: Only Visa and MasterCard debit and credit cards are accepted when paying online.	
	 By mail: Checks made out to "Arizona State University" can be sent to: ASU New Student and Fam Programs, PO Box 872201, Tempe, AZ 85287-2201 	ily
	 In person: Cash and check payments are accepted by the New Student and Family Programs office located in the lower level of the Memorial Union in MU 14. Our office hours are Monday through Frida 8 a.m5 p.m. 	
	To learn more, please visit the enrollment deposit process website. If you have additional questions, please contact the New Student and Family Programs office at 480-965-2880 or by email at orientation@as	u.ed
	Related Article: How do I defer my enrollment deposit?	
edback		
s this article h		

Want More Training? Please visit the UTO Training site at <u>http://links.asu.edu/utotraining</u>, then click on Salesforce Training in left margin to find more training documents like this one.