# Knowledge Article Migration:

**Object API:** Knowledge\_\_kav

**Lightning Navigation:** App Launcher > FinDus

**Classic Navigation:** All tabs > Article Management

## Article Statuses:

Draft – All the created and imported Articles will be in Draft status.

Published – Once Article is ready with all the FAQ and Manuals, it needs to get published.

Archived – Articles which are not in use, can be archived to delete.

Delete – Archived articles can be deleted (not Published and Draft one)

Before start working on Knowledge Articles related activities, make sure you are Knowledge user and having all the Permission Sets created with name Knowledge as captured below:

Text

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**The Process we have been following are:**

Export all the Online/Published Articles from Prod using Workbench. (Better don’t open the exported file before inserting)

Delete all the existing Draft, Published and Archived Articles from Target Org.

Import (Insert) the Article using DataLoader to target org

While inserting you will see couple of errors, like cross reference id, hyphen are added in URL names and all that, all has to get fixed first and import again using error file.

## Once import is done in lower sandboxes, we also have to set Category and Group name for all the imported Articles.

Below are the steps to set the category:

**Get the IDs of Draft and Online Articles:**

SELECT Id FROM Knowledge\_\_kav WHERE PublishStatus = 'Draft' OR PublishStatus = 'Online'

**Records has to get updated for Object: Knowledge\_\_DataCategorySelection**

SELECT ParentId, DataCategoryGroupName, DataCategoryName FROM Knowledge\_\_DataCategorySelection

**Create a excel sheet having below fields and value**

|  |  |  |
| --- | --- | --- |
| ParentId | DataCategoryGroupName | DataCategoryName |
| All IDs fetched from first query | Customer\_Group | All |

For all the IDs fetched from Lower Sandbox, keep the DataCategoryGroupName and DataCategoryName as above and Insert in Object - Knowledge\_\_DataCategorySelection

**Note**: Since we might have multiple groups in Prod, and mapping same in lower environments might be tedious task, as agreed by business, we can set the one group: Customer\_Group for all the Articles.

**Image issue Case Update:**

As per the last call with SF Support below are the suggested points to insert the Articles to any target org:

**Note**: To resolve the additional chat appending issue and missing image issue, these all steps are for just 1 article to insert.

After all below steps we have to zip the image folder, csv file and html file insert the zipped file using import Article option in Salesforce Org not by using Workbench or Dataloader.

* We have to create a HTML file with all the contents supposed to get inserted from Production to target org.
* A content.properties.txt file having encoding and format details required for Articles to get inserted.
* A images folder with all the required images which are required to download from Production manually one by one with same name (Case Sensitive) and image format extension.
* One CSV file with all the required fields and path of html file as captured In a screenshot below:

**Html file:**

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**CSV file:**



**content.properties.txt**

Text

Description automatically generated

**Image folder:**

Graphical user interface, application, PowerPoint

Description automatically generated

Only for Reference:

Other Points and Fixes for some of the errors:

**Error**: Record Type ID: this ID value isn't valid for the user: 0121v000000Fsm1AAC

**Fix**:

Check the record type Id in Prod, get the Record Type Name, Find the same Record Type in Sandbox and Replace the all error having issue with sandbox record type id.

(Replaced all error ID with sandbox's correct Record Type Id 0123O000000SE50)

**Error**: The URL Name cannot match the draft or published version of any other article.

**Reason**: duplicate Article entries in Prod.

**Error**: Invalid URL name. The URL name can include only Unicode characters and hyphens, and it can't begin or end with a hyphen.: URL Name

**Fix**: Removed ? mark from URL Name

# IMPORTANT

The import .zip file must meet the following requirements:

* There can only be one .csv file and one .properties file.
* The .csv file and the .properties file must be in the root directory.
* The compression process must preserve the folder and subfolder structure.
* The .zip file name can’t contain special characters.
* The .zip file can’t exceed 20 MB and the individual, uncompressed, files within the zip file can’t exceed 10 MB.
* .csv files can’t have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
* .csv file rows can’t exceed 400,000 characters.
* .csv file cells can’t exceed 32 KB.
* Each article in the .csv file can’t have more than 49 translations.