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User Manual v4.5

User manual for KBPublisher v4.5

Introduction

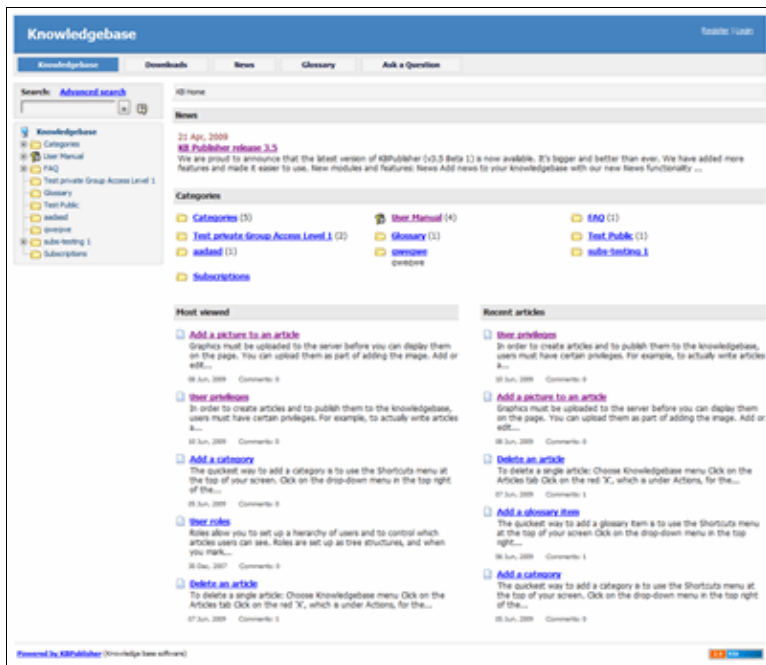
What is KBPublisher?

KBPublisher is a knowledge base which allows you to share information with employees, customers and partners.

- ✓ A fully featured knowledge base that combines powerful WYSIWYG editing with easy to use functionality
- ✓ Unique design and workflow enables you to create and approve articles and files before they are made available to other users
- ✓ The separate File feature means that your existing documentation can be easily inserted
- ✓ Can be integrated into your company intranet or internet
- ✓ Repeatable, reusable content through templates, file attachments and categories
- ✓ KBPublisher is highly customizable
- ✓ Full control of users, what they can do, and what they can see
- ✓ Can be configured to work in almost any language
- ✓ Import facility allows you to import users and articles from your old system in bulk
- ✓ Remote authentication allows you to integrate your current user authentication system with KB Publisher.
- ✓ An area to post announcements
- ✓ Subscription facility allows users to be notified of changes
- ✓ Version history that allows you to keep track of changes to articles
- ✓ Export facility allows you to export articles or whole knowledgebase to PDF or html
- ✓ Reports that provide statistics on users and articles

Public area

Where site visitors, staff read articles, view files, supply/request feedback

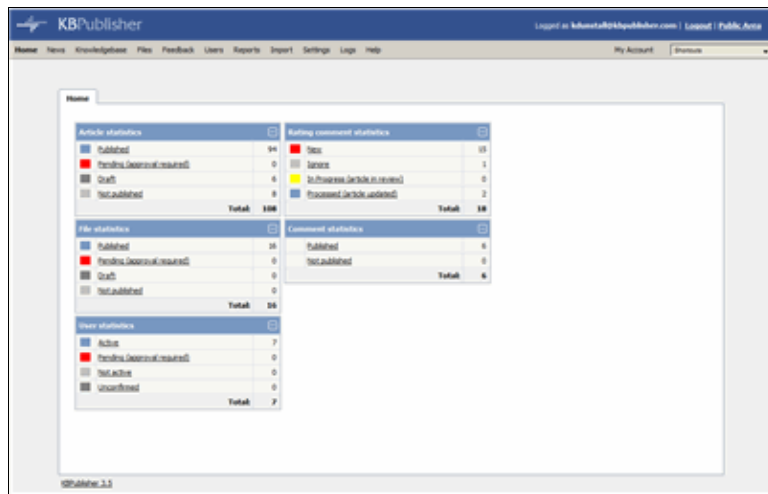


KBPublisher navigation gives you quick access to:

- Articles - read articles in the knowledgebase
- Files - view attached files
- News - read announcements
- Feedback - ability to contact administrator
- Glossary - a glossary of terms
- Comments - users can add comments to articles
- Ratings - users can rate content
- RSS feeds
- Email notifications - users can be notified when an item is changed

Administration area

Where staff create, edit and publish articles, upload files, moderate the knowledgebase and manage users



Where those who prepare and approve the content:

- Create articles
- Have them approved and published (or publish them direct)
- Schedule them to go live at on a specified date
- See history of changes to articles and revert back to earlier versions if required
- Upload files
- Automatically add any file uploaded to you server to the knowledgebase
- Moderate feedback
- Manage comments
- Bulk import articles from other sources
- Manage categories
- Manage users
- Import users
- Generate statistical reports
- Access log files
- Export articles as PDF or HTML files

KBPublisher Uses

Attach it to your company web site or use it standalone in order to:

- Share information with customers and partners
- Provide support for products
- Answer a list of frequently asked questions
- Create a user manual, technical reference or APIs for your software

Use it with your intranet or standalone in order to:

- Share information with employees or other team members
- Set up and use policies and procedures
- Use it as a support help desk
- Manage project documents and other content
- Provide training materials
- Share other company information

The three different category types allow you to display the knowledgebase in a standard knowledgebase format, as FAQs on a page, or as a table of contents for a book or online help.

KBPublisher is highly customizable. You can use it straight out of the box, or you can customize it to match your company design and requirements. The ability to create your own categories means you can organize your topics any way you wish. You also have complete control over who sees content, and when they see it.

KBPublisher can be pretty much anything you want it to be

It's a knowledgebase

First and foremost, KBPublisher is a knowledgebase. Use it to share knowledge with others. Articles, white papers, user manuals, business processes, FAQs, online help, APIs and any other type of information you need to share.

It's a content management system

This user manual was written in KBPublisher.

We created repeatable, reusable chunks of content with templates and inserted them into articles where needed. We used the link and attach features to link to articles and files. We used categories to place each article exactly where we wanted it to be in multiple sections of the manual. We used privileges and types to control who could edit and who could view which sections of the manual. Had we wanted to, we could have used templates to create standard page formats to force our authors to use a consistent style throughout. Lastly, we used content type 'Book' to display the articles as a table of contents.

A help desk

You can use the Feedback option to create a simple help desk request system where the user logs a support request and you supply an answer either by emailing them back, posting an answer on the knowledgebase, or both. Other users can add comments to any postings. You can use the Supervisor function to route different requests to different people to answer. If you

are really keen (and know a bit about HTML forms), you could set up forms in templates and have the user post these as help desk requests.

Public Area (front-end)

The **public area** in KBPublisher is what people who are reading the articles or looking at the files see (as opposed to the **admin area**, which is what authors, editors, moderators and administrators see).

Whether or not a user has to log in to view the public view depends entirely on how you have set up your knowledgebase. It can be set up in any of the following ways:

- Everyone who accesses your site can read the knowledgebase
- Anyone who wants to read the knowledgebase must register and login
- Part of the knowledgebase is available to anyone who visits your site while you must log on to view other parts.

Below is a screenshot of the public view.



Login details are in the top right-hand corner

1. If you are a registered user you can **login**. Once you are logged in this section shows who you are logged in as, and the option changes to logout. If your login has author, contributor, editor or administrator privileges, this will also include a link to the **admin view**.

If your knowledgebase administrator allows it, you can also register as a user to get access to non-public areas of the knowledgebase.

This area also contains **My Account**, which is where you can change your password and user name, manage subscriptions and personalize some settings.

Menu options (table of contents) can be on the left-hand side, on the top menu or above the listed articles, depending on how the knowledgebase is set up. In this case, it has been set up so that menu options are in tabs across the top of the page.

2. When you first enter the screen the **Knowledgebase** tab is highlighted, meaning that articles are displayed. Articles are content that people have authored directly to the knowledgebase.
3. Click on **Downloads** to display a list of files instead. These files have been uploaded and may be text (e.g. Word documents, PDF files), graphics or other file.
4. Click on **News** to see a full list of news items
5. Click on **Glossary** to display items in the glossary. While you are reading articles you will come across red words. These words have been defined in the glossary.
6. **Ask a question** allows the reader to contact the knowledgebase administrators. You might do this if, say, you couldn't find the information you were looking for, had problems using the system, or even if you had an idea for an article.

Add article

7. If you have contributor or author access, you will also have an **Add article** link at the top of the screen. This allows you to quickly add articles.

Search

8. The knowledgebase has both quick search and advanced search. Type text or an article ID into the search field for a quick search, or you can search on other options using the advanced search. You can find out more in [Search Explained](#).

The question mark (?) to the right of the search screen is a help tool. Hover your mouse over the ? to find out more about the field.

Categories

9. The **Categories** section is the table of contents. The user clicks on category items to see sub-categories. Articles in each category are displayed in the main part of the screen.

Breadcrumb trail

10. The breadcrumb trail at the top of the screen shows you where in the article or file hierarchy. You can click on this links to move back to a higher level.

The actual content is in the main screen

11. News is displayed at the top of the screen
12. Categories may also be displayed on the main screen. They can be on the left menu, on the main screen or on both
13. When you first enter Public View, or click on Knowledgebase or Downloads, the main screen contains two columns. The first column lists the five articles or files that have been viewed most often
14. The second column lists the last five articles or columns added. You can click on any of the articles to open the article to read it.

When you click on an actual article the article is displayed in the main screen, and the article that you are viewing is highlighted in the left menu.

15. The detailed article block displays actions and options you can do to this article. It may be placed on the right-hand side of the screen, as in this example, or at the bottom of the text.

As a viewer you can print the article, send it to a friend, view it as a PDF, add a comment or be notified of changes. **Print** brings up a clean copy of the text without associated headings and menus which you can then print using your print button. **Email to friend** allows you to email a link to the article to one or more others. You can include your own message with the email. **Subscribe** allows you to be notified of any changes to the article.

You may also see other information in this panel. Who wrote the article, the date it was written, who last updated it and when and whether or not the article is public or private.

If you have author or editor access you may also update the article, or see all other articles in that category.

16. There are more options at the bottom of the screen. You can rate the article here. When you add a rating, a comment box opens allowing you to say why you rated this article the way you did.
17. Other users' comments are displayed at the bottom of the screen. The full comment may be displayed, or just a link to it.

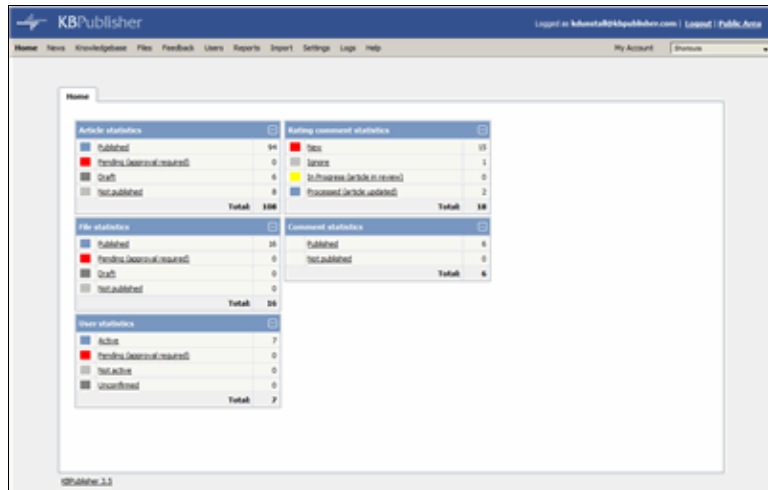


Tip:

- If you are in the Admin area, you can access the public view from the **Public View** tab under **Knowledgebase**.

Admin Area (Back-End), Common Actions

The first tab you see when you enter the Admin area is the Home tab. This shows a summary of the number of articles, files, comments and users in the knowledgebase, and their current status.

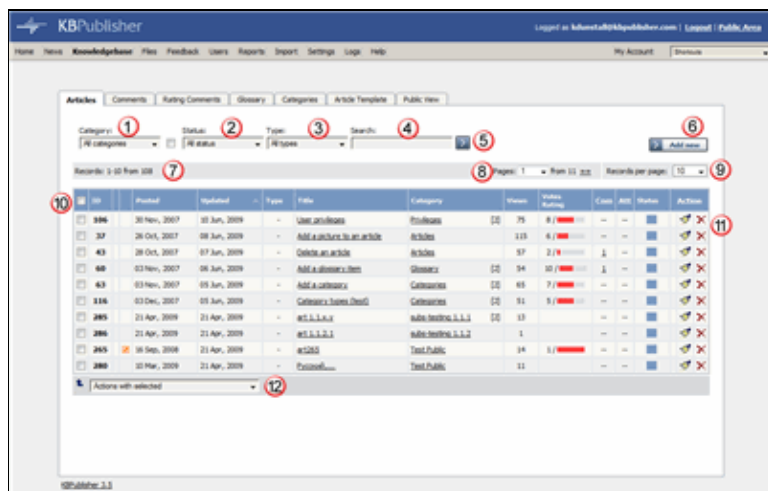


From here you can click on any of the links to produce a list of articles, files, comment or users of that status. Or you can check your setup by clicking on the Setup Tests tab. You can also click on a menu option to choose another administration option - articles, files, news, feedback, users, settings, reports or import/export.

Common functions

KBPublisher works the same way whether you are working with articles in the knowledgebase, with files, or with feedback.

In this article we look at some of the common functionality. The example shows the article screen, because it has the most functionality, but features are applicable for other screens as well.



1. **Category** allows you to filter records in the list so that only items from that category are shown. If the category you choose has sub-categories, items in the sub-category will also be listed. Check the box to the right of Categories to display all items in child

- categories as well.
2. You can restrict the list to published items, unpublished items or pending items by choosing a **Status**. For example, if you are an editor you may wish to just view articles that are pending (approval required) to get a quick list of articles to check and publish.
 3. **Type** allows you to filter on items of a specified type. Because type is optional, many items may not have a type, so you can also choose to find items with 'no type assigned'. Choosing this option lists every article without a type, and omits those that do have assigned types.
 4. If you wish you can **Search** for an article by it's title, by content in the article, using article keywords or by assigning the article ID. Use the asterisk (*) as a wildcard at the start and/or end of the text to widen the search.
 5. Once you have chosen any of the options above, click on the Search/Filter button to produce the new list.
 6. The **Add New** button allows you to add a new article, glossary item, category, file or user, depending on which screen you are currently on.
 7. The knowledgebase shows you how many records it has found, and where you are in the list.
 8. You can jump direct to another page by choosing the page number from the drop-down list. Or use the next (>> >>) and previous (<< <<) buttons to move between pages.
 9. You can switch between showing 10, 20 and 40 records per page by choosing the appropriate number from the drop-down list. (By default, ten records are shown, but the default can be changed by the administrator.)
 10. This list of items shows:
 - ◆ A checkbox to select the article. This is used for bulk actions, see item 12, below
 - ◆ The article **ID**, which is the ID number this article is stored under in the database
 - ◆ Whether or not an item is scheduled. If it is scheduled, you will see a clock in this column
 - ◆ A **key** if the article is private
 - ◆ The date the article was created, under the **Posted date**
 - ◆ The date the article was last updated, under **Updated date**
 - ◆ The article **Type**, if it has one
 - ◆ The **Title** of the article
 - ◆ The **Category** of the article. If the article is displayed in more than one category, the total number of categories it is displayed in is shown in square brackets after the category name
 - ◆ The number of times this article has been viewed under **Views**
 - ◆ What rating users have given the article under **Votes/Rating**
 - ◆ Number of **Comments** made about the article
 - ◆ Whether or not there are any **Attachments**, and if there are, how many
 - ◆ **Status** is a color denoting whether the article is published, pending or unpublished
 - ◆ **Actions**, which allow you to update or edit items
 11. You can update or edit any item from this screen using the actions in the **Actions** column.

To update an item, click on the paintbrush. To delete an item, click on the red cross. To view and manage the earlier versions of the article, click on the document icon.
 12. Or you can use the bulk update option. Select the articles you wish to update, and then choose the appropriate bulk action from the drop-down list.

Searching for Articles

You can browse for articles by clicking on category headings and then selecting the article title, or you can search for articles using the search tool.

Searching the knowledgebase is easy and powerful.

Search functionality is provided by MySQL full-text searching. This is a natural language search that allows you to type in a question or sentence that describes the information you are searching. The program uses logic to determine the keywords in the sentence.

Search allows you to search for the title of the article, for text within the article, for any meta information such as keywords and for the article ID. The advanced search allows you to further refine your search to a specific article type or category.

If you still cannot find the information, KBPublisher has a feature whereby you can ask a question. As you type the question, KBPublisher will display articles that might answer your question. If you still can't find an answer in that list, click OK to email your question to the knowledgebase administrator. Questions can be targeted too, so that a specific questions will be sent to different users in your knowledgebase.

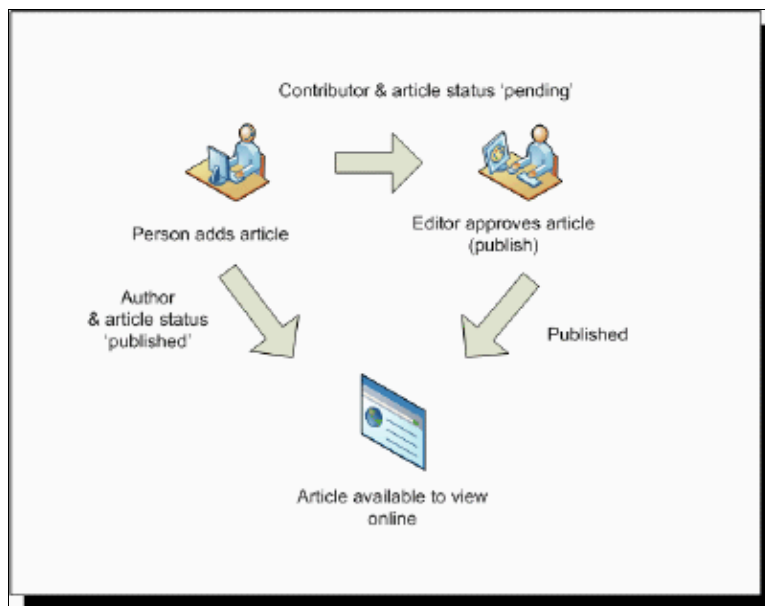
Article workflow

Content is added to the knowledgebase in the form of articles.

Users with author or contributor access create the articles. They work on them in draft mode until the article is complete.

If they are authors, they can publish direct to the knowledgebase. If they are contributors they can only create drafts and articles that are 'pending' approval and these must then be 'published' by a supervisor or administrator.

Every knowledgebase category can have a "Supervisor". If an article is placed into pending in a category with a supervisor, then the supervisor receives an email notification to approve the article. If there is no supervisor for the category then a notification is sent to the knowledgebase administrator instead.



The user who approves the article must have the appropriate privileges to approve it. If the article is private, the approver must also have access to it (i.e. they should have an appropriate role).

User privileges

Any user can read articles, but in order to create articles and to publish them to the knowledgebase, users must have certain privileges.

For example, to actually write articles a user must have author or contributor privileges.

To publish the article for other users to read, they must be in the author, editor or moderator privilege groups. KBPublisher comes with five default privilege groups, and you can also create your own.

There are five default privilege groups.

- **Administrator** sets up the system, controls user accounts, designs the site and so on
- **Moderator** has access to every part of the system except Settings and Import/export. The moderator generally creates users, organizes categories and manages the knowledgebase on a day to day basis
- **Editor** can add, edit and delete their own and other users articles, files, comments and visitors' questions. This is the person responsible for the overall content of the knowledge base.
- **Author** provides the actual content. An author can add, edit, delete or publish their own articles and files. When they have completed an article and published it, the article appears immediately in the article list
- **Contributor** also provides content, and can add edit or delete their own articles and files but the articles and files do not appear in the knowledgebase immediately. They must be approved by an editor or a moderator. Once an article or file is approved, the contributor can no longer edit it.

You can also create your own privilege groups.

Here is a quick chart of default user types in KBPublisher

	No privileges not logged in	No privileges logged in	Contributor	Author	Editor	Moderator	Admin.
Read published articles/files	●	●	●	●	●	●	●
Read private published articles/files		●	●	●	●	●	●
Add comments*	●	●	●	●	●	●	●
Rate articles*	●	●	●	●	●	●	●
Email administrator*	●	●	●	●	●	●	●
Create articles			●	●	●	●	●
Edit/delete own draft articles/files			●	●	●	●	●
Edit/delete own published articles/files				●	●	●	●
Edit/delete other authors' articles/files					●	●	●
Publish articles				●	●	●	●
Add/edit delete glossary items					●	●	●
Manage user comments					●	●	●
Manage categories						●	●
Create/edit/update users						●	●
Manage templates						●	●
Import/export articles/users							●
Change KBPublisher settings							●

Privilege levels

Each user type has a **privilege level**. The privilege level defines who can edit users of this level. Users cannot edit other users with a privilege level lower than or equal to their own.

Admin users always have a privilege level of 1. They can edit any other user. In the standard setup editors have a privilege level of 3, while authors have a privilege level of 4 and contributors 5. This means that an editor could--if he had edit user access--edit author and contributor users while a contributor could not edit any users except other contributors (again, and only if he had edit user access). None of them can edit admin users.

This gives an extra level of security when editing users.

* Adding comments, rating articles and sending emails to the administrator are all options that can be turned on or off in the settings. Hence while these options are available, they must also be turned on if you wish to use them.

User roles

Roles allow you to set up a hierarchy of users and to control which articles users can see.

Roles are set up as tree structures, and when you mark an entry as private to a specific role then users with this role and with parent roles have access to the article. Any role below it in the tree, and roles that do not belong to 'current tree', will not be able to access the article.

For example, suppose you have the following roles:

Title
Employees
Customers
Contractors
:.... Manager
:.... Beta Tester
:.... Tech Writer
:.... Programmer
Partners

In the above tree the Contractors role has a sub-role of Manager, and below that sub-sub-roles of Beta Tester, Tech Writer and Programmer.

Users can be assigned to multiple roles. Thus your programmer could also be an employee.

If you mark an article private read and assign to it a role of 'Programmer', then contractor managers and programmers will be able to access the entry. No one else will have access to this article.

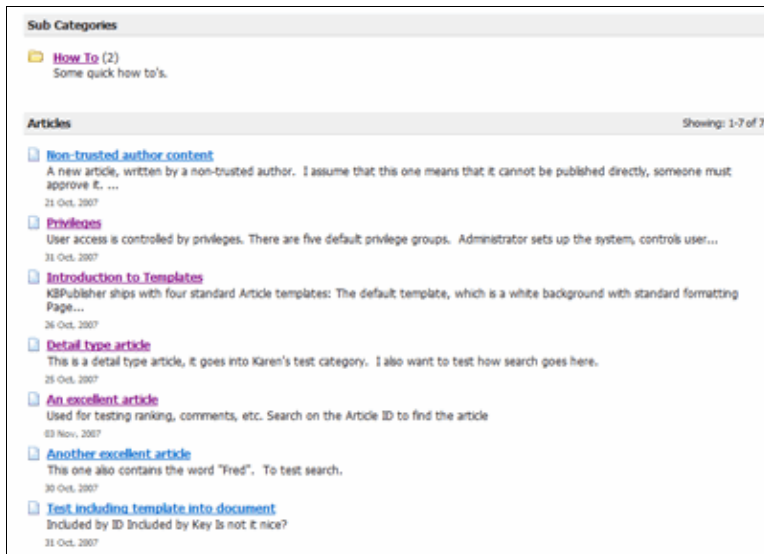
Note:

- Users with administrator privilege have access to any article in any category.

Category types

Category type controls how articles in this category are displayed in the public view. There are four category types:

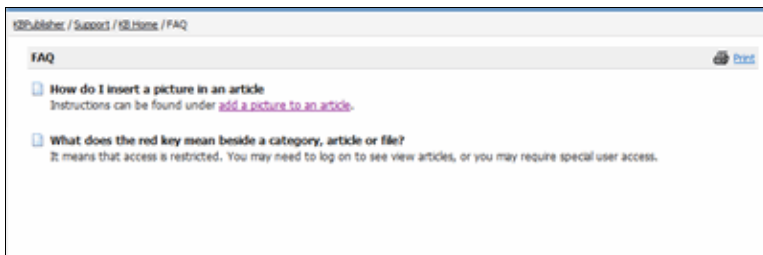
- The **Standard** (default) type displays a list of articles, along with one or two lines of text.
If the category has sub-categories, these are displayed above the list.



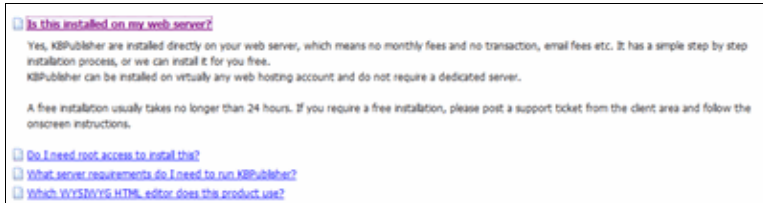
- The **book** type displays items as a table of contents.



- The **Quick FAQ** type displays all articles in the category on the same page.



- While the **Quick FAQ (interactive)** type displays all articles in the category on the same page as well, but with only the titles displayed initially. Click on the title to display the article, click on it again to hide it.



Quick Response

By "connecting" your contact form with your knowledge base, your visitors can get instant answers to questions that they would normally send you via email.

If a user clicks on **Ask a question**, when they start typing their query into the **Question/Comments** field, KBPublisher checks what they are typing and searches for articles that may answer the question.

It presents the five best matches at the bottom of the screen under a heading called 'Do these answers help?'

The five articles returned change as the user types more words.

The screenshot shows the KBPublisher Knowledge Base interface. At the top, there is a navigation bar with 'KBPublisher / Support / KB Home / Contact Us' and a user login status 'You are logged in as: AdminStaff | LogOut | Admin Area'. Below this is a 'Contact Us' form with fields for 'Subject' (set to 'Default'), 'Title' (set to 'default user groups'), and 'Question / Comment' (containing 'How do I create default user groups'). A red arrow points to the 'Question / Comment' field with the text 'Start typing your question here'. Below the form is a captcha image with the characters 'n99tZZ' and a 'Confirmation code' field. A green banner below the form reads 'Do These Answers Help?' and 'We have found some answers in our knowledge base that might help to answer your question:'. Below this banner is a list of five search results, each with a title and a brief description. A red arrow points from the search results back to the 'Question / Comment' field with the text 'And the knowledgebase brings up five possible articles that might answer your question.' The search results are:

- [User privileges](#) | (27/05/2015)
In order to create articles and to publish them to the knowledgebase, users must have certain privileges. For example, to actually write articles a user must be in one of the two author privilege groups. To make the article available for other users to read, they must be in the author...
- [Create new user privilege](#) | (27/05/2015)
Privileges control what a user can do on the system. There are five default privilege groups, but you can also create your own. You must have administrator access to create new privileges. To create a new privilege group: Click on Users Choose the Privileges tab Click Add New...
- [Privileges](#) | [User Manual Draft \(some things explained\)](#)
User access is controlled by privileges. Administrator sets up the system, controls user accounts, creates templates, designs and so on Moderator has access to every part of the system except settings. The moderator generally creates...
- [Create new user role](#) | (27/05/2015)
Roles control access to knowledgebase articles and files. Some default roles have been created, but you can also create your own. You must have administrator access to create new roles. To create a new role: Click on Settings Choose the Role tab Click Add New The...
- [Summary](#) | [Getting started](#)
Welcome to KBPublisher. This section tells you how to quickly get your knowledgebase up and running. If you haven't already done so, to post articles under to create content and to publish it. The article tells you which type of user(s) you will need to create, if you already have...

At the bottom of the search results are 'OK' and 'Cancel' buttons. The footer of the page reads 'Powered by KBPublisher (Knowledge base software)' and 'v1.0.0'.

Turning off quick response

This option can be turned off in Settings if you prefer a basic feedback form without this feature.

- Go to **Admin Area**
- Click on the **Settings** menu
- On the **Common** tab, under **Feedback**, uncheck **Enable 'quick response'**.

Subscriptions

Subscriptions allow you to be notified when:

- A single article is changed
- Any article in a specified category is changed, or when new articles are added to the category
- A single file is changed
- Any file in a specified category is changed, or when new files are added to the category
- News is added or changed
- A comment has been added to an article or file.

When you set up a subscription for a specified item or category, then KBPublisher sends you an email when that file or category is changed.

You can see what you have subscribed to on the **Subscriptions** tab under **My Account**.



This functionality works in version 3.5 and above

Article history

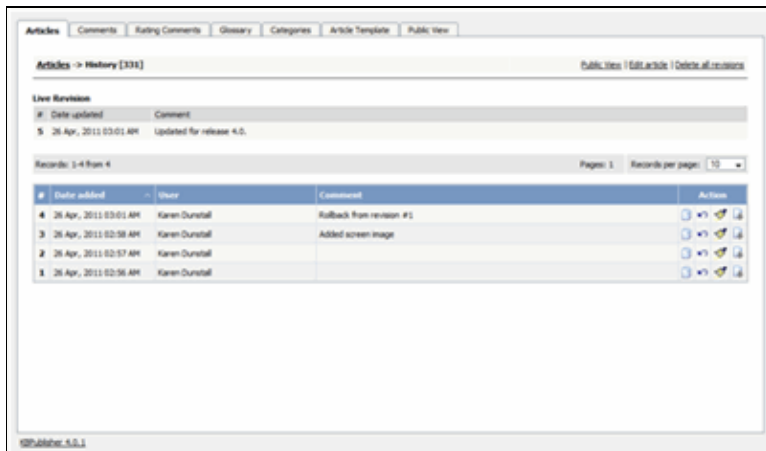
KBPublisher keeps a history of all changes you make to the content of an article. When you update an article, you can add revision comments to easily track changes.

Revision comments:
Please add article revision comments for future reference.

Updated for release 4.0.

You can view earlier versions and compare them against the current version to see what has changed.

You can roll back to earlier versions.



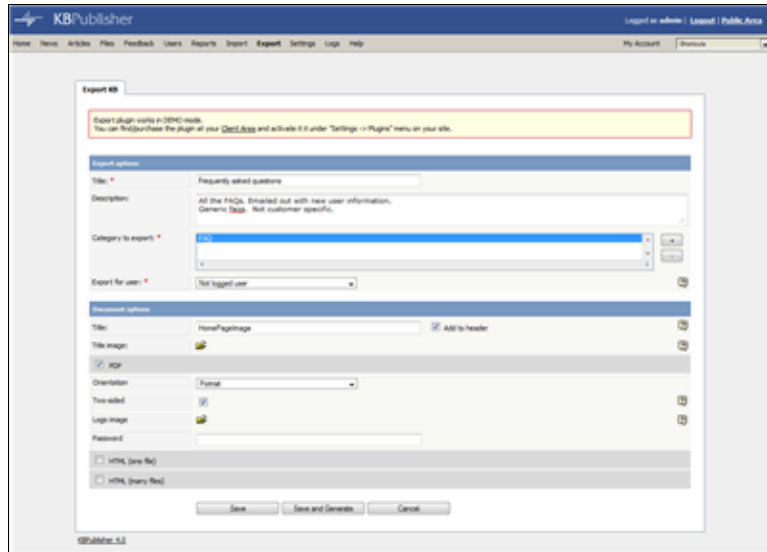
The screenshot shows the 'Articles -> History [331]' page in KBPublisher. It features a navigation bar with tabs for 'Articles', 'Comments', 'Rating Comments', 'Glossary', 'Categories', 'Article Template', and 'Public View'. Below the navigation, there are links for 'Public View', 'Edit Article', and 'Delete All Revisions'. A 'Live Revisions' section contains a table with columns for '#', 'Date updated', and 'Comment'. Below this is a summary of 'Records: 1-4 from 4' and 'Page: 1' with a 'Records per page: 10' dropdown. The main table lists four revisions with columns for '#', 'Date added', 'User', 'Comment', and 'Action'.

#	Date added	User	Comment	Action
4	26 Apr, 2011 03:01 AM	Karen Durnstall	Rollback from revision #1	View Edit Delete
3	26 Apr, 2011 02:58 AM	Karen Durnstall	Added screen image	View Edit Delete
2	26 Apr, 2011 02:57 AM	Karen Durnstall		View Edit Delete
1	26 Apr, 2011 02:56 AM	Karen Durnstall		View Edit Delete

Export articles

You can also purchase our optional plug-in that allows you to export articles in your knowledgebase to PDF or to html pages.

- You can do this for the complete knowledgebase or for only one category
- You can tailor the export to be generic or to display only those articles a specific type of user/customer can see



Note:

- This plugin is an optional extra. It must be purchased separately.

Custom Fields

You can customize your knowledgebase by adding custom fields. These custom fields can be defined for:

- Specific article categories
- Specific file categories
- News items
- Feedback form

For articles, the custom fields can:

- Be displayed at the top of the article
- Be displayed at the bottom of the article
- Be displayed after the rating block
- Or they can be hidden, for internal use only

For files, fields are for internal use only. That is, you can see them when you add the file, but the user cannot see them.

Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Installation

System Requirements

KBPublisher has minimal requirements and should work on any modern server.

Client Side:

- Operating System: Windows, Mac or Linux
- Web Browser: Internet Explorer 6.0+ or Chrome, Firefox, Safari.

Server side

- Operating System: Linux, Unix, Windows, Mac
- Web Server: Apache Web Server / IIS5 or above
- Database: MySQL 4.1 or above
- Scripting Language: PHP 5.0 - 5.4...

Installing KBPublisher

The easiest way to install KBPublisher is to use the installation wizard.

The install script is extremely simple. The only action required on your part is to click the *next* button when each step is completed and you will be prompted for each action that is required from your side to proceed with installation. However, there are some things you need to do before you start to ensure the process runs smoothly.

Before you start

Check that:

- PHP is installed on your server
- MySQL is installed on your server

If any of these are not, install these first.

Install KBPublisher using the wizard

1. Unpack the distribution package
2. Place it somewhere in your web-server's document root, preferably the parent directory of your root web directory. Usually the root directory will be *public_html*, *htdocs* or *www*.
3. You can rename "kb" folder as you wish (it will be a part of your URL for knowledge base)
For example if you rename it to "kbbase" and place it in document root directory (document root/kbbase)
the URL for knowledge base will be **www.yourdomain.com/kbbase/**
4. Type `http://yourdomain.com/kb/setup/index.php` into your browser address line, where is your domain name, and is either 'kb', if you retained the default, or whatever folder you renamed it to. For example, if you used the domain name in step 3, this would be **www.yourdomain.com/kbbase/setup/index.php**.
The installation wizard comes up.
5. Follow the installation wizard instructions.

After the wizard finishes

Once the wizard completes, you need to set up scheduled tasks to ensure the knowledgebase works smoothly.

If you don't set up scheduled tasks then some functionality in KBPublisher will not work.

Check that everything is installed properly

Use the Setup Tests tab on the Home screen of the Admin area to ensure that everything is installed properly.

Notes

- We recommend the following directory structure (and this is what the installation

wizard creates).



kb_file - for uploads via "Files" module

kb_cache - for cache files

kb - knowledgebase code (rename it as you wish, it will be a part of your URL for knowledge base)

kb_upload - for uploads via HTML editor

- The **kb_file**, **kb_cache** and **kb_upload** directories must be writeable by PHP. The installation wizard creates these directories if you run a Windows system. However, if you are a Linux user it may fail due to access problems. In this case you will need to create the directories manually and CHMOD them to 0777.
- We recommend that you place the **kb_upload** directory in the parent directory of your root web directory. If you later decide to move your knowledgebase to new location it will help you to keep paths correct for uploaded images.
- Wizard will try to create database for you, if it can't do it you need to create it manually.

At the MySQL console, run the following commands:

```
CREATE DATABASE db_name [DEFAULT] CHARACTER SET [=] charset_name |  
[DEFAULT] COLLATE [=] collation_name;  
GRANT ALL ON db_name TO 'username'@'host' IDENTIFIED BY 'password';  
e.g.
```

```
mysql> CREATE DATABASE kbp DEFAULT CHARACTER SET utf8 COLLATE  
utf8_general_ci;  
mysql> GRANT ALL ON kbp TO 'me'@'mydomain.com' IDENTIFIED BY  
'xda44f54fddGHRECT';
```

- Don't forget to **set up scheduled tasks**. If you don't set this up you can still create articles and manage your knowledgebase, but you will lose some of the advanced features. You won't be able to schedule articles, users won't receive alerts and you won't get any reports.

Installing KBPublisher manually

If you don't want to install KBPublisher using the [install wizard](#), you can install it manually as follows:

1. Unpack the distribution package.
2. Place it somewhere in your web-server's document root, preferably the parent directory of your root web directory. For many people, this will be the **public_html** directory.
3. By default, the distribution package is in a folder called **kb**, and this link will be included in the URL of the knowledgebase. For example, the default URL of the knowledgebase will be **www.your_domain/kb/**, where *your_domain* is your domain name.
You can rename the 'kb' folder as you wish. If, for example, you rename it to 'kbase' and place it in the document root directory, the URL for knowledge base will be **www.your_domain/kbase/**.
4. Create an empty MySQL database to be used by KBPublisher, or use existing one.

To create new run the following commands at the MySQL console:

```
CREATE DATABASE db_name [DEFAULT] CHARACTER SET [=] charset_name |  
[DEFAULT] COLLATE [=] collation_name;  
GRANT ALL ON db_name TO 'username'@'host' IDENTIFIED BY 'password';
```

e.g.

```
mysql> CREATE DATABASE kbp DEFAULT CHARACTER SET utf8 COLLATE  
utf8_general_ci;  
mysql> GRANT ALL ON kbp TO 'me'@'mydomain.com' IDENTIFIED BY  
'xda44f54fddGHRECT';
```

5. Create a directory to store files uploaded by the **File** option. We recommend that you name it **kb_file** and place it somewhere outside your document root directory. It should not be accessible via http (web browser).

Create a directory to store files uploaded by the **HTML editor**. We recommend that you name it **kb_upload** and place it in document root directory.

Create a directory to store cache files. We recommend that you name it **kb_cache** and place it somewhere outside your document root directory. It should not be accessible via http (web browser).

The structure of directories should look like this:



6. If you are installing a new version of KBPublisher:

- ◆ Create tables using db dump file at **kb/setup/db/install.sql**
- ◆ Create an admin user using file at **kb/setup/db/create_user.sql**

If you are upgrading from a previous version of KBPublisher:

- ◆ Use DB dump file **kb/setup/db/upgrade_[version]_to_[version].sql**
- ◆ *Do not forget to backup old DB.*

7. Configure your **kb/admin/config.inc.php** configuration file.

If you installed KBPublisher in **document_root/kb/** directory

```
$conf['admin_home_dir'] = '/kb/admin/';
$conf['client_home_dir'] = '/kb/';
```

If you installed KBPublisher in **document_root** directory

```
$conf['admin_home_dir'] = '/admin/';
$conf['client_home_dir'] = '/';
```

8. In some cases you have to configure your **kb/index.php** file to set the correct path to admin directory and **kb/rss.php**, **kb/captcha.php** files to set the correct path to kb installation directory. Normally these will work without any modifications.
9. Give your **kb_upload**, **kb_file**, **kb_cache** directory full write permissions. In unix you can type "chmod 777 ". On Windows you must go through your webserver to give it write permissions.
10. Set up scheduled tasks to enable scheduling, reporting and subscriptions.
11. You're done.

The public area screen will be available at **www.your_domain/kb/**
The admin area will be available at **www.your_domain/kb/admin/**

Login: admin
Password: demo

DO NOT FORGET TO CHANGE PASSWORD!

12. Log on to KBPublisher and go to **Settings** tab to configure settings. Make sure you set correct email address at *Setting -> Email* .
13. Read the FAQ

Upgrading KBPublisher

Before you start

Please note that upgrading via the wizard is possible only for version 2.0 and above. If you are currently using an older version of KBPublisher upgrade to version 2.0 first.

Option 1 (retain current installation until you have tested the upgrade)

1. Make a copy of your previous KBPublisher installation database. This database will be modified during the upgrade.
2. Unpack the distribution package to a directory with a different name to that of your current knowledgebase directory, for example to "kb_new". This ensures that the previous installation is not overwritten.
3. Open your browser and go to **`http://<your_domain>/<kb_installation_path>/setup/index.php`**, where `<your_domain>` is your domain name, and `<kb_installation_path>` is the path where KBPublisher is installed that you created in step 2. e.g. **`http://mydomainname.com/kb_new/setup/index.php`**. The installation wizard comes up.
4. Follow the installation wizard instructions.
5. After testing the new installation, rename your current (old) KBPublisher installation directory to something appropriate, for example to "kb_old".
6. Rename new KBPublisher installation directory to your previous installation directory name.
7. Update configuration file `<kb_installation_path>/admin/config.inc.php` by setting new values for `$conf['admin_home_dir']` and `$conf['client_home_dir']`.

Note that this option creates a new database. If you wish to continue to use the original database, then once you have tested that everything is working, backup the old database, rename the new one and change the database name in `config.inc.php` to match the name of the original.

Option 2 (upgrade directly into the current knowledgebase)

1. Rename your current KBPublisher installation directory. For example to "kb_old".
2. Backup your database.
3. Unpack the distribution package to the directory where the previous version of KBPublisher was installed.
4. Open your browser and go to **`http://<your_domain>/<kb_installation_path>/setup/index.php`**, where `<your_domain>` is your domain name, and `<kb_installation_path>` is the path where KBPublisher is installed. e.g. **`http://mydomainname.com/kb/setup/index.php`**. The installation wizard comes up.
5. Follow the installation wizard instructions.

Option 3 (replace modified files only)

With some small KBPublisher upgrades, we supply a quick upgrade option called a "Modified Files Only" package. For example, this package is available to upgrade from v3.0 to v3.0.1 This allows you to simply replace modified files rather than doing a full upgrade. You can download it from your client area in the same way you can download a full upgrade package.

The modified files package contains:

- A **kbp** folder that contains all modified files to be copied. The structure of the folder and sub-folders is the same as the KBPublisher directories/files structure
- A **My-SQL script** to run, called *db_upgrade_from_[version]_to_[version].sql*, that updates the version number of your database
- A file called **how_to_upgrade.txt** that tells you what you need to do to upgrade
- A **list of updated files** in *updated_files.txt*.

Standard steps to upgrade:

1. Backup your current KBPublisher installation, directory and database (recommended).
2. Copy the contents of the **kbp** folder found in downloaded "Modified Files Only" package to your current KBPublisher installation directory. We recommend that you copy the files by folder, rather than all at once.
(ATTENTION: Mac OS users. You should copy file by file. Do not copy folder by folder. It does not work for you and will replace entire folder(s) and delete non modified files).
3. Upgrade your database by running the *db_upgrade_from_[version]_to_[version].sql* file found in downloaded "Modified Files Only" package. If your KBPublisher tables prefix is not "kbp" then you should update sql file and set you tables prefix.

For example from:

```
UPDATE `kbp_setting` SET `input_id` = '5' WHERE `id` = 46;
```

To:

```
UPDATE `your_prefix_setting` SET `input_id` = '5' WHERE `id` = 46;
```

Notes:

- The original installation will already have *kb_file* and *kb_upload* directories. Check where these are, and during the upgrade make sure that your *kb_file* and *kb_upload* directory paths are the same as for original installation
- Here is a recommended directory structure for KBPublisher



kb_file - is for uploads via 'Files' module

kb_cache - is for cache files

kb_upload - is for uploads via the HTML editor

kb_file, **kb_cache** and **kb_upload** directories must be writeable by PHP.

On a Windows system this generally is not a problem, but on Linux systems you will need to CHMOD these directories to 0777.

- If you using **Remote Authentication** please keep your file (*kbp_directory/admin/lib/custom/remote_auth.php*) and copy it to new installation.
- If you using **language** other then **en** please keep directory (*kbp_directory/admin/lang/your_lang*) and copy it to new installation.

Installing ionCube loader

For KBPublisher v4.0.2 and lower ionCube loader must be installed.

On many web servers the Loader can be enabled automatically with no changes to the php.ini file and no server restart required.

If your server does not have ionCube support already enabled, you can obtain Loaders for your server platform from [here](#). Instructions for installing Loaders can be found [here](#).

You can also you can run the ioncube helper file distributed with KBPublisher.
Run your browser to *http:///ioncube/ioncube-loader-helper.php*

If you install IonCube loader in the php.ini file you can check if loader installed in phpinfo.

Please see [this article](#) for how to create the phpinfo file.
If the loader installed correctly you should see it in the Additional Modules section in phpinfo.

Additional Modules

Module Name
ionCube Loader
sysvsem
sysvshm

Setting up scheduled tasks

Important: You must schedule tasks

Some parts of KBPublisher simply will not work if you do not schedule tasks. This includes:

- Reports. You will not be able to run reports
- Subscription processing. Users will not be notified when items are added or changed
- Scheduling. You will not be able to schedule article, news or files
- Optimization. Database tables will not be checked/repaired/optimized
- Synchronization. Article and file hits will not be synchronized
- Search suggest will not work
- Administration. Some system jobs will not run.

How do I schedule tasks?

You can configure scheduling through the Unix **crontab** command, through **scheduled tasks** in Windows, or through the Control Panel provided by your service provider.

When scheduling tasks for KBPublisher there are several files you must run periodically.

The files to be scheduled are:

- admin/cron/freq.php - every 5 minutes
- admin/cron/hourly.php - hourly
- admin/cron/daily.php - daily, just after midnight
- admin/cron/weekly.php - weekly
- admin/cron/monthly.php - monthly

1. By 'crontab' on Unix

```
# every 5 minutes
*/5 * * * * /usr/local/bin/php [KBP_DIRECTORY]/admin/cron/freq.php

# hourly
0 * * * * /usr/local/bin/php [KBP_DIRECTORY]/admin/cron/hourly.php

# daily, after midnight
01 0 * * * /usr/local/bin/php [KBP_DIRECTORY]/admin/cron/daily.php

# weekly
10 0 * * 0 /usr/local/bin/php [KBP_DIRECTORY]/admin/cron/weekly.php

# monthly
20 0 1 * * /usr/local/bin/php [KBP_DIRECTORY]/admin/cron/monthly.php
```

where **/usr/local/bin/php** is the path to the PHP interpreter, it could differ on your system (you can get it by running '*which php*' on command shell), and **[KBP_DIRECTORY]** is the absolute path to your KBPublisher installation directory (e.g. '/home/user_name/www/kb'). Replace it with your value.

OR

```
# every 5 minutes
*/5 * * * * /usr/bin/curl -s http://example.com/kb/admin/cron/freq.php
```

```

# hourly
0 * * * * /usr/bin/curl -s http://example.com/kb/admin/cron/hourly.php

# daily, after midnight
01 0 * * * /usr/bin/curl -s http://example.com/kb/admin/cron/daily.php

# weekly
10 0 * * 0 /usr/bin/curl -s http://example.com/kb/admin/cron/weekly.php

# monthly
20 0 1 * * /usr/bin/curl -s http://example.com/kb/admin/cron/monthly.php

```

You can insert these crontab records by executing 'crontab -e' and editing cron jobs manually, or you can create a file (kbp_cron.txt) containing these lines and execute 'crontab kbp_cron.txt' from shell (WARNING: all existing records in crontab will be removed!).

2. By 'Scheduled Tasks' on Windows

Instead of cron on Windows you can use Scheduled Tasks. Contact your system administrator or hosting provider for additional details.

To set up Scheduled Tasks on Windows XP, Vista and 7, as well as Windows 2003 Server and later, you can use schtasks.exe. Open command line and type in following commands:

```
schtasks /create /ru "System" /sc minute /mo 5 /st 00:00:00 /tn "KBPublisher freq task" /tr "[PHP_DIR]\php.exe [KBP_DIRECTORY]\admin\cron\freq.php"
```

```
schtasks /create /ru "System" /sc hourly /st 00:00:00 /tn "KBPublisher hourly task" /tr "[PHP_DIR]\php.exe [KBP_DIRECTORY]\admin\cron\hourly.php"
```

```
schtasks /create /ru "System" /sc daily /st 00:01:00 /tn "KBPublisher daily task" /tr "[PHP_DIR]\php.exe [KBP_DIRECTORY]\admin\cron\daily.php"
```

```
schtasks /create /ru "System" /sc weekly /st 00:10:00 /d SUN /tn "KBPublisher weekly task" /tr "[PHP_DIR]\php.exe [KBP_DIRECTORY]\admin\cron\weekly.php"
```

```
schtasks /create /ru "System" /sc monthly /st 00:20:00 /tn "KBPublisher monthly task" /tr "[PHP_DIR]\php.exe [KBP_DIRECTORY]\admin\cron\monthly.php"
```

Where: [PHP_DIR] - full path to php.exe, [KBP_DIRECTORY] - full path to KBPublisher directory. Replace it with your values

Example: schtasks /create /ru "System" /sc minute /mo 5 /st 00:00:00 /tn "KBPublisher freq task" /tr "C:\php\php.exe C:\www\kbpublisher\admin\cron\freq.php"

3. By Control Panel

This depends very much on your hosting provider. You should consult their documentation.

Notes:

- admin/cron/freq.php should be run every 5 minutes
- admin/cron/daily.php should be run just after midnight.

This functionality works in version 3.5 and above

Enable searching in files

Text-based file searching/indexing (txt, html, etc.) is enabled by default. If you want to include searching PDF or Word documents then you need to do the following.

Searching in PDFs

To enable search in PDFs you need to:

- Install a program called **xpdf**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your xpdf directory. (Check your *open_basedir* PHP setting in *php.ini*)
- Ensure that PHP can run the system function. (Check your *disable_functions*, *safe_mode_exec_dir* PHP settings in *php.ini*)

Install xpdf

- xpdf is available from www.foolabs.com/xpdf/download.html
- Download and install it.

Update the setting to point to xpdf

Once you have installed xpdf, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Admin -> XPDF installation path**
- Make sure that this points to the directory where you installed xpdf. For example:
/usr/local/bin/ or c:/wwwroot/xpdf/
- Set this to 'off' to de-activate this option.
- When you click "Save", test pdf file will be parsed/indexed and error occurs if it failed.

Test xpdf from command line

Test to see if xpdf is working by running the following command from the command line:

```
$ /path_to_xpdf/pdftotext -raw file_read.pdf file_write.txt;  
Test xpdf from command line using PHP and included test file:
```

```
$ cd /path/to/kbp_directory  
$ php -r "system('/path_to_xpdf/pdftotext -raw admin/extra/file_extractors/extract_test.pdf  
file_write.txt');"
```

Searching in Word 2007/2010, Excel 2007/2010 or Open Office document files

To enable search in .docx, .xlsx and .odt documents you need to:

- Install a **PHP Zip** extension if you do not have one
- You can see if you have it installed in *Home -> Setup Tests* tab in your KBPublisher installation

Searching in Word 2003 and below files

To enable search in Word documents you need to:

- Install either **catdoc** or **Antiword**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your catdoc directory. Check your *open_basedir* PHP setting in *php.ini*.
- Ensure that PHP can run the *exec* function. Check your *disable_functions*, *safe_mode_exec_dir* PHP settings in *php.ini*.

Install catdoc

- catdoc is available from <http://www.wagner.pp.ru/~vitus/software/catdoc/>
- Download and install it.

Install Antiword

- **Antiword** is available from <http://www.winfield.demon.nl/>
- Download and install it.

Update the setting to point to catdoc

Once you have installed catdoc, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Admin -> catdoc installation path**
- Make sure that this points to the directory where you installed catdoc. For example: */usr/local/bin/* or *c:/wwwroot/catdoc/*
- When you click "Save", test pdf file will be parsed/indexed and error occurs if it failed.

Test catdoc from command line

Test to see if catdoc is working by running the following command from the command line:

```
$ /path_to_catdoc/catdoc -w file_read.doc;
```

Test catdoc from command line using PHP and included test file:

```
$ cd /path/to/kbp_directory
```

```
$ php -r "system('/path_to_catdoc/catdoc -w admin/extra/file_extractors/extract_test.doc');"
```

Turning PDF or Word search off

If you don't want to allow searching on PDF or Word documents, change the setting in *XPDF installation path* or *catdoc installation path* to **OFF**.

Enable Exporting to PDF

To export multiple articles to PDF or HTML files you need to:

- Install a program called **HTMLDOC**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your HTMLDOC directory. (Check your `open_basedir` PHP setting in `php.ini`)
- Ensure that PHP can run the `proc_open` function. (Check your `disable_functions`, `safe_mode_exec_dir` PHP settings in `php.ini`)
- **Buy** the export **plugin** or try it in Demo mode
- Add the plugin key to your KBPublisher settings

Install HTMLDOC

Note: At this time there is no commercial support for the HTMLDOC. The windows binaries can be found here.

- HTMLDOC is available from <http://www.htmldoc.org>
- Download it and install it

Update the setting to point to HTMLDOC

Once you have installed HTMLDOC, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Plugins -> HTMLDOC installation path**
- Make sure the **HTMLDOC installation path** points to the directory where you installed HTMLDOC. For example: `/usr/local/bin/`.
- When you click "Save", test HTML file will be parsed and error occurs if it failed.

Buy the plugin

Export functionality is not available with the default KBPublisher package. You must purchase it separately.

Please see this article how to buy the plugin.

Add the plugin key to KBPublisher

You should have received an email with you plug-in key. If you can't find the email, you can also get this from the **My Licenses** tab in your client area on the KBPublisher website.

- Copy the license key from your client area or the email
- Log on to your knowledgebase
- Go to the **Admin Area**
- Click on the **Settings** menu
- Click on the **Plugins** tab
- Paste your key into the **Plugin key** field
- **Save**.

Test HTMLDOC from command line

To convert a single web page type:

```
$ /path_to_htmldoc/htmldoc --webpage -f output.pdf filename.html
```

Test using PHP and included test file:

```
$ cd /path/to/kbp_directory
```

```
$ php -r "system('/path_to_htmldoc/htmldoc --webpage -f output.pdf  
admin/extra/plugin/export/template/export_test.html');"
```

Tip:

- If you want to try the export plugin before you buy, use demo mode to get an idea of how it works.

This functionality works in version 4.0 only

Setup tests

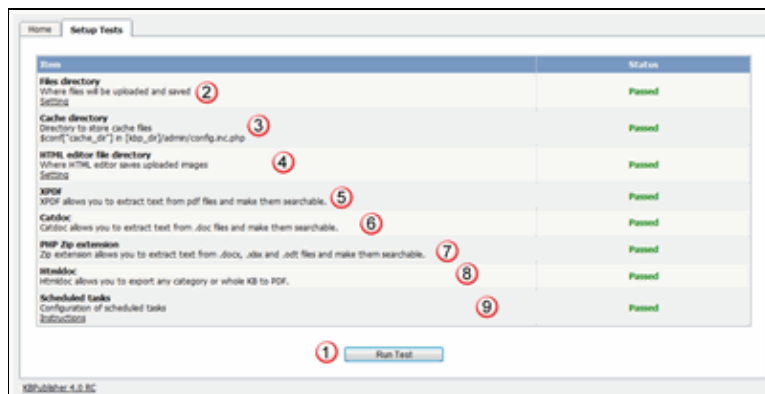
The Setup Tests screen is available as a tab from the home menu. It allows you to check that your knowledgebase has been set up properly.

To get to the screen:

- Log on as an admin user
- Click **Home** menu
- Click on the **Setup Tests** tab

The Setup Tests tab

When you first install KBPublisher the Setup Tests screen doesn't show much. Click on **Run Test** to get some results.



1. **Run Tests.** This is the button that starts it all.
2. The **Files directory** is where files are stored. If this is *passed*, it means that the folder exists and can be written to. If you need to check the name of the directory, click on **Setting**.
3. The **Cache directory** is where cached files are stored. This is defined in the php config file. You normally would not change this. Again, *passed* means that the directory exists.
4. The **HTML editor file directory** is where images are stored. If this is *passed* it means that the directory exists and can be written to. If you need to check or update the name of the directory, click on **Setting**.
5. **XPDF** allows you to search PDF files.
If this setting is *disabled*, then XPDF has not been installed. If this is *failed or error* details of the error will be provided.
If it is *passed*, your knowledgebase should be able to search PDF documents.
To install XPDF, see [Enable Searching in Files](#).
6. **Catdoc** allows you to search Word 2003 files.
If this setting is *disabled*, then Catdoc has not been installed. If this is *failed or error*, details of the error will be provided.
If it is *passed*, your knowledgebase should be able to search .doc documents.
To install catdoc, see [Enable Searching in Files](#)

7. **PHP Zip extension** allows you to search Word 2007/2010 files and Excel 2007/2010 files and from OpenOffice documents.
If this setting is *failed or error*, then PHP Zip extension has either not been installed or is not installed properly, details of the error will be provided.
If it is *passed*, then your knowledgebase should be able to search docx, xlsx, and .odt files.
To install Zip extension, see [this link](#)
8. **Htmldoc** allows you to produce user manuals of your knowledgebase. You can purchase this as a plugin.
If this is *disabled*, it means that it hasn't been installed. If this is *failed or error*, details of the error will be provided.
If this is *passed* then you should be able to export your kb to PDF and/or HTML.
See [enable exporting to PDF](#) for setup and requirements.
9. **Scheduled tasks** tells you if your cron jobs are set up properly.
If this is *disabled*, then you will not be able to schedule tasks or run reports and users will not be notified of changes they have subscribed to. Some admin tasks will also not run.
Cron jobs are set up on the server. [Click here](#) for how to set them up.
If this is *error*, then there is a problem in your setup and some tasks could not execute. Information about the problem will be listed with the error.
If this is *passed* then your cron jobs have been set up properly and scheduled tasks should run.

Note:

- This test is also run as a regular scheduled task. If there is an error, the knowledgebase administrator is notified by email.

This functionality works in version 4.0 only

Getting started

Summary

Welcome to KBPublisher. This section tells you how to quickly get your knowledgebase up and running.

- If you haven't already done so, [install KBPublisher](#)
- [Create one or more categories](#) to post articles under
- [Add some users](#) who will create content and publish it. Use the [Default User Privileges](#) article to help determine which type of user(s) to create. If you already have a list of users in another database, consider [importing](#) them in to KBPublisher rather than adding each one individually.
- [Add some articles](#). Likewise, if you have a lot of articles that already exist in another database, consider a [bulk import](#) of articles instead of typing them in individually.

That's it. Your knowledgebase is ready.

Add a Category

The quickest way to add a category is to use the **Shortcuts** menu at the top of your screen.

- Click on the drop-down menu in the top right of the screen and choose **Add new category**.

Or you can do it via the **Categories** tab in the Admin Area

- Click on the **Articles** menu
- Choose the **Categories** tab
- Click on **Add New**.

You can also add a category while you are in the middle of adding an article or a file

- Edit the article or file
- Click on the assign categories button (+)
- Click on **Add New Category**.

Once you are on the category screen you must complete the following sections:

- Add a **Title**. This is the name that will be displayed on the left menu or in any table of contents.
- Define where it fits in the category hierarchy by choosing a **Parent category** and an **Order**. If you don't change these you will add a new top-level category and it will be placed last.

You may also:

- Change how articles are displayed by specifying a category **type**
- Control read and write access through **Private** and **Active**
- **Allow** users to **comment** on or **rate** articles in the category
- Assign a person to approve articles (**Supervisor**) for the category

You can find out more about each of these fields and how they work in [the Category screen explained](#).

Add an Article

If you are in the Public area, the quickest way to add an article is via the button in the top right of your screen:

- Click on **Add article**

If you are in the Admin area, another fast way is to use the **Shortcuts** menu at the top of your screen:

- Click on the drop-down menu in the top right of the screen and choose **Add new article**.

Or you can do it via the **Articles** tab.

- Click on the **Articles** menu
- Choose the **Articles** tab
- Click on **Add New**.

Once you are on the article screen you must complete the following sections:

- Choose where you want the knowledgebase article to be displayed by adding a **Category** or categories
- Add a **Title**. This is the heading displayed on the knowledgebase screens and in any menus/table of contents.
- Type your article in the **Article** editing box.

The following items are optional:

- To help users search within your database, include a **Type** and **Meta Keywords**
- To optimize web search add **Meta Keywords/Tags** and a **Meta Description**
- To add links to other web sites, include **External links**
- To add links to other articles in the KBPublisher database, include them as **Related articles**
- To add links to files, include them as **Attachments**
- To force users to log on to read an article, mark it as **Private Read**. To restrict who can read the article mark it as private read and then assign specific roles which can access it. To restrict who can edit the article, mark it as **Private Write**.
- To say where in the list the article is placed, specify the **Order**
- Use the **Status** field to make the article available to read.

You can find out more about each of these fields and how they work in [The Article Screen Explained](#).

Once your article is complete:

- Click **OK** to save it.

Tips:

- If you leave this page before you click OK, your article will not be saved.
- If you have a number of articles to add from another database, say, you may want to import articles instead of adding them.

Add a glossary item

The quickest way to add a glossary item is to use the **Shortcuts** menu at the top of your screen

- Click on the drop-down menu in the top right of the screen and choose **Add new glossary item**.

Or you can do it via the **Glossary** tab in the **Articles**.

- Choose **Articles** menu
- Click on the **Glossary** tab
- Choose **Add New**

Once you are on the screen you must complete the:

- **Word/phrase** field. This is the word or phrase that is highlighted in red the articles.
- **Definition**. This is the text displayed in the yellow box when the user clicks on the word that is highlighted.

You can also choose whether to:

- **Highlight once**. If you check this box the glossary item will only be highlighted once on each article page. If you don't check this box, every time the word or phrase is found, it will be highlighted.

Add a user

To add a new user

- Click on the **Users** menu
- Click on **Add New**.

Once you are on the Users screen you must complete the following sections:

- Give the user a **First Name** and a **Last Name**
- Add their **Email**
- Give them a **Username**. If you prefer, you can set their email as their user name.
- Set up a **Password**

The following items are optional:

- Assign a **Privilege**. If you do not assign a privilege the user will have standard read access to the public area.
- To classify the user, and provide another level of access, include a **Role**.
- You can include extra user details such as a **Middle Name, Phone** and **Company**
- You can add comments about the user or registration
- You can automatically subscribe them so that they receive changes to news, articles or files
- To give the user immediate access to the system, make this user **Active**
- To send an email to the user after then that their user ID has been created, check **Notify User**.

You can find out [more](#) about each of these fields on the User screen and how they work in the [User Screen Explained](#)

Once your user has been set up:

- Click **OK** to save it.

Tips:

- If you leave this page before you click OK, your article will not be saved
- If you have a number of users to add from another database, say, you may want to [import users](#) instead of adding them
- Or you may choose to [allow users to register](#), which effectively allows them to create their own user.

Final steps

You now have a simple, working knowledgebase. Now users can read your articles.

From here, you may like to:

- Experiment with different category types to see what effect each one has
- Consider adding roles to users so that you can control what individual users see
- Add items to your glossary
- If you have lots of pre-existing documentation that can't be imported as articles, why not upload them as files.

If you are an administrator, you can also fine-tune the system:

- Modify the look and feel of your knowledgebase
- Add some templates to make creating your articles easier
- Take a look at the email templates to see what's in the mails going out from and coming in to the knowledgebase
- Manage the RSS feeds
- Create your own user privileges and roles
- Set some initial user defaults.

Remote Authentication

Using Remote Authentication

Remote authentication allows you to integrate your organization's authentication system with KBPublisher. Configuration requires only a few simple steps.

Before you start:

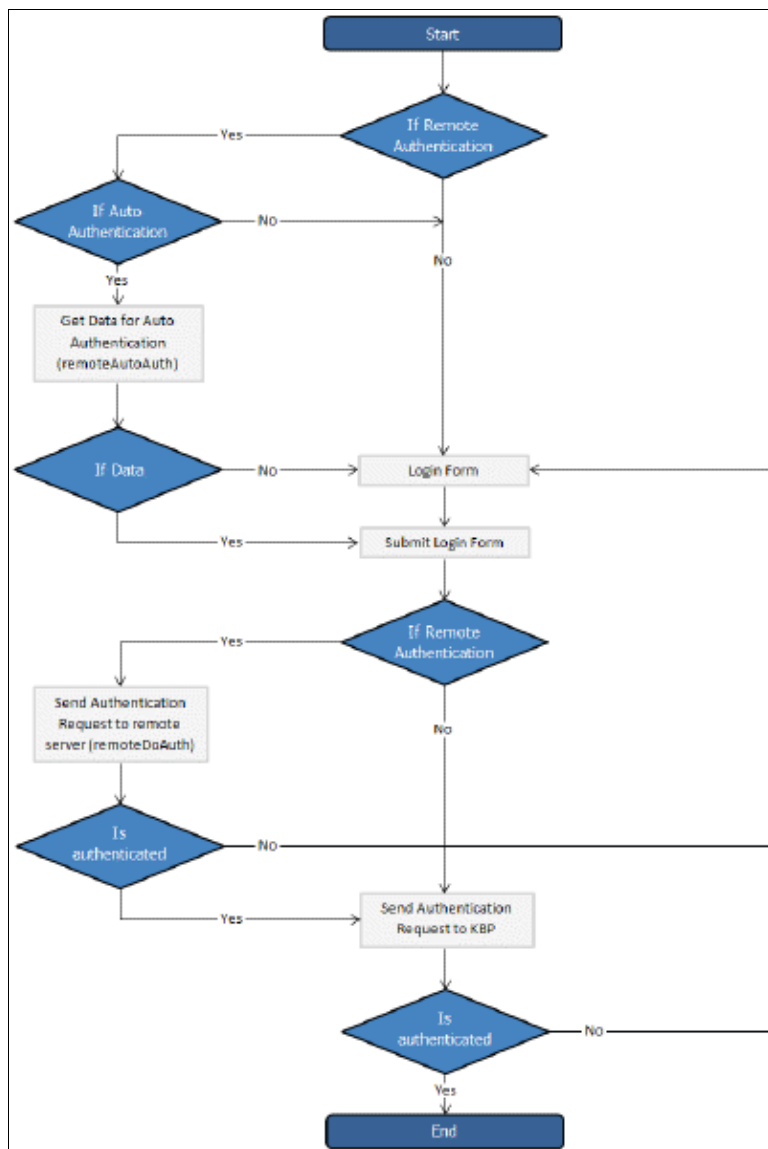
- We assume that you have some experience with PHP and with the system you are connecting to.

Steps to enable Remote Authentication

- Set the config variable `$conf['auth_remote']` in the file `admin/config.inc.php` to **1**
- Set required values for constants in file `admin/lib/custom/remote_auth.php`
- Customize the `_remoteDoAuth` function in the file `admin/lib/custom/remote_auth.php` to authenticate the username and password passed to it against your own authentication system
- Rename the function `_remoteDoAuth` to `remoteDoAuth`

Quick summary of the process

- End user goes to site
- Remote Authentication checks for valid user credentials
 - ◆ If auto-authentication is set, does this automatically
 - ◆ If auto-authentication is not set, user logs in first
- KBPublisher authenticates the user .



Customizing the remoteDoAuth function

In your installation there is a folder *admin/lib/custom*. Within that folder is a file called *remote_auth.php*. This file contains the *_remoteDoAuth* function. Customize this function to do authentication against your internal system by using the username and password provided.

Here is a simple example of the function customized to authenticate against a MySQL database:

```

function remoteDoAuth($username, $password) {
    $user = false;
    $db = &DBUtil::connect($conf);

    $sql = "SELECT 1 FROM ss_user WHERE username = '%s' AND password = '%s'";
    $sql = sprintf($sql, $username, $password);
    $result = &$db->Execute($sql) or die(db_error($sql, false, $db));
}

```

```
// if found
if($result->RecordCount() == 1) {
    $user = 1; // assign a user id, this user id should exists in kb user table
}

return $user;
}
```

Also see examples in [attached files](#).

Tracking logins

You can see how your remote authentication works in logs Logs/Logins

For debugging every last login is logged to a file called *last_remote_login.log* in the KBPublisher cache directory (*APP_CACHE_DIR* in *admin/config.inc.php*).
For example: */home/username/kb_cache/last_remote_login.log*

Different ways for Remote Authentication

There are two different types of remote authentication. It is controlled by the **KB_AUTH_TYPE** constant:

1. Adding/refreshing remote user data to KBPublisher and authenticate user.
2. Authentication by existing KBPublisher user.

Adding/refreshing remote user data to KB and authenticate user

KB_AUTH_TYPE = 1

On success, the authentication function **remoteDoAuth** should return an associative array with the following keys:

- first_name
- last_name
- email
- username
- password-- as the user types when they login, that is, not encrypted
- remote_user_id -- a unique userID stored in your system
- role_id - (optional)
- priv_id - (optional) privilege for user. If user has a privilege, he will have access to Admin Area

Authentication by existing KBPublisher user

KB_AUTH_TYPE = 2

On success, the authentication function **remoteDoAuth** should return.

- the user_id of the user in the KBPublisher USER table (kbp_user)
- OR**
- Associative array with keys (user_id, username), for example: array('user_id'=>7, 'username'=>'Test').

There are also other configuration variables

- **KB_AUTH_AREA**
 - 1 - Enabled for Public area only, remote authentication allowed on Public Area login screen
 - 2 - Enabled for Public and Admin areas
- **KB_AUTH_LOCAL**
 - 0 - never try to authenticate by KBPublisher built in authentication
 - 1 - always try to authenticate by KBPublisher built in authentication first
 - 2 - will try to authenticate by KBPublisher built in authentication if Remote Authentication failed
- **KB_AUTH_LOCAL_IP**

Only users with specified IP(s) are allowed to be authenticated by KBPublisher's built in

authentication

it only matters when KB_AUTH_LOCAL = 1 or 2.

You can set a specific IP or an IP range. Use an "-" to separate IP ranges, and a ";" to separate individual IP addresses.

For example: 127.0.0.1;210.234.12.15;192.168.1.1-192.168.255.255

- **KB_AUTH_REFRESH_TIME**

The time, in seconds, to rewrite user data, (3600*24*30 = 30 days), works if

KB_AUTH_TYPE = 1

0 - never. Once the user is created, data in kb table never updated by script

1 - on every authentication request user data in the knowledgebase will be synchronized with data provided by script.

- **KB_AUTH_RESTORE_PASSWORD_LINK**

Here you may provide a link where your remote users can restore their password.

Set to false not to display the restore password link at all.

KBPublisher will determine whether to set your link or the built-in one.

- **KB_AUTH_AUTO (Using Auto Authentication)**

This variable controls whether or not the user sees a login screen and has to log in to KBPublisher, or whether they are automatically logged in.

0 - Disabled, user gets login screen

1 - Enabled, user doesn't see login screen

2 - Enabled, in debug mode. User doesn't see login screen. It allows not to block "Auto Auth" if authentication failed.

Use only for debugging and don't forget to change back to 1 or 0 when you have authentication working.

Using Auto Authentication

Auto authentication allows you to automatically authenticate users.

Steps to enable Auto Authentication

- Set the constant **KB_AUTH_AUTO** in the file *admin/lib/custom/remote_auth.php* to **1**
- Customize the **_remoteAutoAuth** function in the file *admin/lib/custom/remote_auth.php* to catch current user data and return it
- Rename the function **_remoteAutoAuth** to **remoteAutoAuth**

Customizing the remoteAutoAuth function

In your installation there is a folder *admin/lib/custom*. Within that folder is a file called *remote_auth.php*. This file contains the *_remoteAutoAuth* function. Customize this function to get the current user's credentials.

On success, the function **remoteAutoAuth** should return an associative array with keys (username, password) for the user. For example: `array('username'=>'John', 'password'=>'Test')`.

Here is a simple example of the function customized using HTTP authentication:

```
function remoteAutoAuth() {  
  
    $user = false;  
  
    if(isset($_SERVER['PHP_AUTH_USER']) && isset($_SERVER['PHP_AUTH_PW'])) {  
        $user = array();  
        $user['username'] = $_SERVER['PHP_AUTH_USER'];  
        $user['password'] = $_SERVER['PHP_AUTH_PW'];  
    }  
  
    return $user;  
}
```

Debugging auto-remote authentication

You can debug auto-authentication by setting **KB_AUTH_AUTO** = 2, which allows you to continually try relogging in so that you can fix any problems without having to start over every time. **Important:** Don't forget to reset this back to 1 (or 0) when you have finished debugging.

Using Active Directory for Remote Authentication

It is possible to use Remote Authentication with your LDAP server.

Before you start:

- We assume that you have some experience with remote authentication, with PHP, and with lightweight directory access protocols (LDAP).

Requirements

LDAP support in PHP is not enabled by default. You will need to enable it. For more details check PHP documentation at <http://php.net/ldap>.

You may want to use Active Directory/PHP Helper library from <http://adldap.sourceforge.net>. If you do want to use it, download the library and place it into the *kb_installation_dir/admin/lib/custom* directory.

Here is an simple example of the function customized to authenticate against a LDAP server:

```
function remoteDoAuth($username, $password) {
    require_once 'custom/adLDAP.php';

    $auth = false;
    if(empty($username) || empty($password)) {
        return $auth;
    }

    //create the AD LDAP connection
    $adldap = new adLDAP();

    $user = array();
    $ldap_user = $adldap->user_info($username, array(*));

    // if found, populate $user array
    if($adldap->authenticate($username, $password)){
        $user['first_name'] = $ldap_user[0]['givenname'][0];
        ...
    }

    return $user;
}
```

You can find more examples in *kb_installation_dir/admin/lib/custom* directory.

Remote Authentication scenarios

Here are some examples/scenarios for Remote Authentication:

1. On the first authentication request the remote user is added to KBPublisher table of users.
On the second and subsequent requests he/she is authenticated by KBPublisher's built in authentication.
KB_AUTH_LOCAL = 1
KB_AUTH_TYPE = 1
KB_AUTH_REFRESH_TIME = 1.
2. Always authenticate by Remote Authentication and rewrite user data in the knowledgebase.
KB_AUTH_LOCAL = 0
KB_AUTH_TYPE = 1
KB_AUTH_REFRESH_TIME = 1
3. On the first authentication request the remote user is added to KBPublisher users.
On the second and subsequent requests the user is authenticated by remote authentication and his/her KBPublisher data is synchronized with data provided by your script, depending on the KB_AUTH_REFRESH_TIME.
KB_AUTH_LOCAL = 0
KB_AUTH_TYPE = 1
KB_AUTH_REFRESH_TIME = 3600*24*30 (30 days).
4. KBPublisher tries to authenticate the user by built-in Authentication first. On failure KBPublisher tries to authenticate the user by Remote Authentication.
KB_AUTH_LOCAL = 1
KB_AUTH_TYPE = 2
5. If user IP matches KB_AUTH_LOCAL_IP range, then KBPublisher tries to authenticate the user by built-in Authentication first. If the IP does not match, or built-in authentication fails, KBPublisher tries to authenticate the user by Remote Authentication.
KB_AUTH_LOCAL = 1
KB_AUTH_LOCAL_IP = '192.168.1.1-192.168.255.255';
KB_AUTH_TYPE = 2

Adding KB_AUTH_AUTO = 1 to any of these means the user will not be asked to type in their username and password.

System will get that information automatically. See [this article](#) how to set up Auto Authentication.

Importing

Import users

You can import users in bulk. You might want to do this if you are changing over to KBPublisher from an old system, or if you have signed up a new company or organization and the company provides you with a list of users to create.

The process is:

- Create a file of users to import
- Upload a test sample to the system
- Import.

Create a file of users to import

First, you need to create your file of users. This is a comma-separated (CSV) text file that consists of some or all of: **first name**, **last name**, **email**, **username**, **password**, user ID, date registered, middle name, telephone number and an active flag.

- The first five fields (highlighted bold) *must* be included. You can include some, all or none of the others as required.
- They do not have to be in the same order as above, but each line in the import file must contain the same fields in the same order.
- The password is encrypted. You cannot import plain text passwords; they must be encrypted in MD5 format. Ensure that the person providing you with the list encrypts the passwords.
- The active flag defaults to '1', which is active, so the only time you would set this is if you don't want the users to be active.
- Place the data for each user onto a single line, and separate each field by a comma. Do not include spaces before or after the comma.
- The [TestImportUsers.csv](#) file is a sample that shows what your upload file should look like. This file includes the five default fields only.
- Field sizes and types are specific, as per the table below. Your data must fit within these parameters or the upload will fail.

Field	Type/size	M/O	Comments
first_name	varchar(50)	compulsory	
last_name	varchar(100)	compulsory	
email	varchar(100)	compulsory	
username	varchar(50)	compulsory	
password	varchar(32)	compulsory	Encrypted. MD5 format.
imported_user_id	int(10) unsigned	optional	
date_registered	date	optional	Format YYYY-MM-DD. If not supplied will use

			current date.
middle_name	varchar(50)	optional	
phone	varchar(20)	optional	
active	tinyint(1)	optional	Default = 1

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported users and try again. Create a test file and run that first.

- Copy the first, say, three lines of your text import to a separate file
- Either:
 - ◆ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ◆ Upload the file to the server

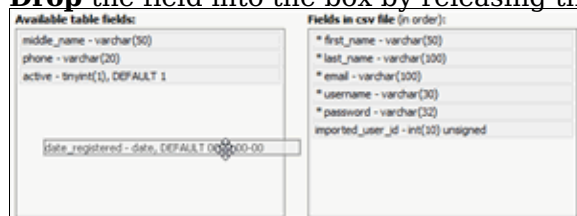
Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import/Export menu**
- This brings up the **Import Users** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and open it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Move the **CSV fields** around to specify which fields are in the file and what order they are in.
Do this by clicking on the name of the field you want to move and dragging and dropping it into the appropriate place.

For example, suppose you only want the five mandatory fields included. You need to move the *date_registered* and *imported_user_id* fields out of the **Fields in CSV** box and into the **Available table fields** box. Let's start with the *date_registered* field.

- ◆ Click on the *date_registered* field and hold the mouse down
- ◆ While holding the mouse down, **drag** the *date_registered* field over to the **Available table fields** box
- ◆ **Drop** the field into the box by releasing the mouse



Make sure that you place it in the order it appears in the file.

- Change **CSV options** if required.
- Click **Load**.

Once the load is complete you are returned to the Import Users tab. At the top of the screen you see a message telling you whether the import was successful and how many users were imported.

- If the import reports as successful, click on the **Users** tab to check the result for yourself.

Fix any problems

All going well, you should now have three new users. Check them carefully and ensure that everything worked as you expected.

If you had problems, delete these three users, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the users.

Import users

Import the rest of the users using the same process as for the test file, only this time using the real data file.

Note:

- Imported users have no roles or privileges.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.
- Use the **bulk actions** option to change roles, privileges, etc.

Import articles

You can import articles in bulk.

You might want to do this, say, if you are changing over to KBPublisher from another system.

The process is:

- Create a file of articles to import
- Upload a test sample to the system
- Import.

Create a file of articles to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of some or all of: **title**, **body**, **date_posted**, *id*, *author_id*, *updater_id*, *meta_keywords*, *meta_description*, *entry_type*, *external_link*, *date_updated*, *hits*, *sort_order*, *private* and an *active* flag.

- The first three fields (title, body and date_posted) *must* be included. You can include some, all or none of the others as required.
- They do not have to be in the same order as above, but each line in the import file must contain the same fields in the same order.
- The active flag defaults to '1', which is active, so the only time you would set this is if you don't want the users to be active.
- Place the data for each user onto a single line, and separate each field by a comma. Do not include spaces before or after the comma.
- Place quotes (") around text fields such as **body**, and be sure to check that your text does not have quotes within the text. If your body, or other text field, does contain quotes, choose a different delimiter and update the **fields optionally enclosed by** field to match.
- The [TestImportArticle.csv](#) file shows a sample of what your upload file should look like. This file includes the three default fields only.
- Field sizes and types are specific, as per the table below. Your data must fit within these parameters or the upload will fail.

Field	Type/size	M/O	Comments
title	text	M	Enclose text in quotes (")
body	mediumtext	M	Enclose text in quotes (")
date_posted	datetime	O	Format 0000-00-00 00:00:00
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
author_id	int(10)	O	If not supplied, the user currently logged in and importing the articles is set as the author.
updater_id	int(10)	O	If not supplied, the user currently logged in and importing the articles is set as the updater.
meta_keywords	text	O	

			Enclose text in quotes ("). Format should be the same as if you are adding the keywords in add new article.
meta_description	text	O	Enclose text in quotes (").
entry_type	tinyint(3)	O	Type.
external_link	text	O	Enclose text in quotes (").
date_updated	timestamp	O	Defaults to time imported to knowledgebase.
hits	int(10)	O	Defaults to 0.
active	tinyint(1)	O	Defaults to 1.

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported articles and try again. Create a test file and run that first.

- Copy the first, say, three lines of your text import to a separate file
- Either:
 - ◆ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ◆ Upload the file to the server

Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import/Export menu**
- Click on the **Import Articles** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and load it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Move the **CSV fields** around to specify which fields are in the file and what order they are in.
Do this by clicking on the name of the field you want to move and dragging and dropping it into the appropriate place.
For example, suppose you want the three mandatory fields included, plus the author ID. You need to move the *user_ID* field from the **Available table fields** box into the **Fields in CSV file box**.
 - ◆ Click on the *user_ID* field and hold the mouse down
 - ◆ While holding the mouse down, **drag** the *date_registered* field over to the **Fields in csv file** box
 - ◆ **Drop** the field into the box by releasing the mouse

Available table fields:	Fields in csv file (in order):
id - int(11) unsigned, PRIMARY	* title - text, FULLTEXT
author_id - int(11) unsigned, INDEX	* body - mediumtext, FULLTEXT
update_id - int(11) unsigned, INDEX	* date_posted - datetime, DEFAULT 0000-00-00 00:00:00
meta_keywords - text, FULLTEXT	
meta_description - text, FULLTEXT	
entry_type - tinyint(2) unsigned, INDEX	
external_link - text	
date_updated - timestamp, DEFAULT CURRENT_TIMESTAMP	
hits - int(11) unsigned	
sort_order - smallint(5) unsigned, DEFAULT 1	
private - tinyint(1)	
active - tinyint(1), DEFAULT 1	

Make sure that you place it in the order it appears in the file.

- Change **CSV options** if required.
- Click **Load**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

Fix any problems

All going well, you should now have three new articles in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these three articles, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the articles.

Import articles

Import the rest of the articles using the same process as for the test file, only this time using the real data file.

Note:

- Articles are imported with a category name of *Imported*. If this category does not exist it will be created as part of the upload process.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.
- Use the **bulk actions** option to change the categories, etc.

Import glossary

If you already have a list of terms and definitions that you would like to use in your knowledgebase, you can upload these terms in bulk.

The process is:

- Create a file of glossary items to import
- Upload a test sample to the system
- Import.

Create a file of glossary items to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of a **phrase**, followed by a **definition**.

- Both fields *must* be included, and they must be in the order of glossary item name (phrase) first, and then the text that explains it
- Place the data for each glossary item onto a single line, and separate each field by a comma. Include a space after the comma. If you choose to use something else other than a comma, update the **field terminated by** field under CSV options to match.

Field	Type/size	M/O	Comments
phrase	varchar(100)	M	The maximum size of a phrase is 100 characters
definition	text	M	
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
Highlight once	tinyint(1)	O	Defaults to 0.

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported glossary items and try again. Create a test file and run that first.

- Copy, say, the first three lines of your text import to a separate file
- Either:
 - ♦ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ♦ Upload the file to the server

Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import menu**
- Click on the **Import Glossary** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and load it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Change **CSV options** if required.
- Click **Load**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

Fix any problems

All going well, you should now have three new glossary items in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the glossary.

Import articles

Import the rest of the glossary using the same process as for the test file, only this time using the real data file.

Note:

- If the glossary item already exists, a new item will still be uploaded. We recommend you do not duplicate.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.

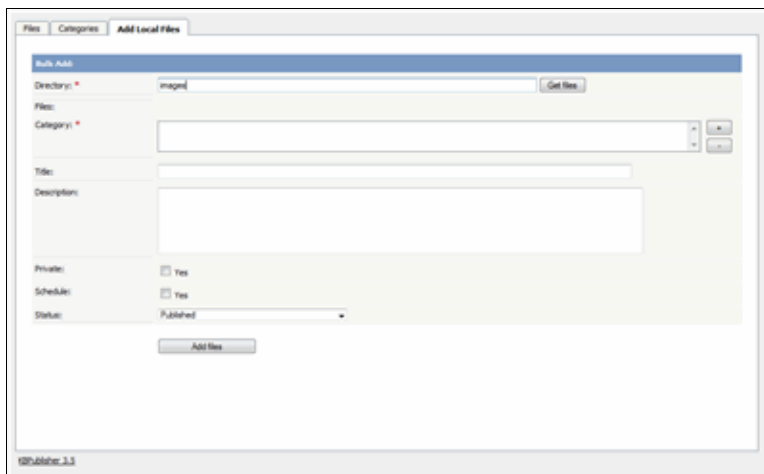
This functionality works in version 4.0 only

Add a Local File

When you add files using [Add a File](#), you upload the file from your local drive (e.g. your c: drive) or a server drive. But sometimes the file you want to upload is already on your server, and if you upload the file again you'll end up with two copies of it. This often happens, for example, when your knowledgebase is integrated into your company web site and you want to include documents from your website: forms, disclaimer documents, product disclosure statements, catalogues, support manuals and so on.

You don't have to upload it twice. Instead, you add it as a local file.

- Click on the **Files** menu
- Choose the **Add Local Files** tab
- Type the name of the directory where the files are stored in the **Directory** field



- Click **Get Files** to find a list of valid files in the directory.

This brings up a list of files found in that directory. Initially, all are selected. Uncheck the box next to Filename to deselect them all, or uncheck individual files to deselect them one at a time.



- Select the files that you wish to upload
- Add a file **category**. You can add multiple categories.

If you wish you can also:

- Add a **title** and a **description**. If you upload more than one file, each file will have the same title and description
- Make the file **private**
- Change the **status**, or **schedule** a status change at a specified date and time

Once you have completed filling in the details:

- Click **Add Files** to upload the files selected.

The files are displayed in the specified category(ies) along with other files,

Tips:

- The files that are found are controlled by the **Allowed/Denied extensions** setting on **Admin** tab under **Settings**. If you have said there are no restrictions, then all files in the directory are found. If you have said only image and text files are loadable, then only image and text files will be found. See the [Files tab explained](#) for more information about this.
- Files listed are only those in the directory specified. It does not find files in directories below this.
- The PHP **open_basedir** setting determines where KBPublisher searches for the files. If you find that Get Files only searches the directories under the knowledgebase itself, then check your settings to see if PHP restricts it to this.

Automatically Add Local Files

The Directory Rules screen allows you to set up the knowledgebase so that KBPublisher automatically checks the specified directory on the server every day and adds links to any new files to KBPublisher.

Standard allowed and denied extension rules apply, based on your denied and allowed extensions set in the [Files Settings](#) tab.

Note that it doesn't actually move files, it just adds links, so once they have been added to KBPublisher if you move them from the specified folder you will end up with broken links.

Rule options

1. The **Directory** is the folder on the server where the files are to be uploaded from. Directory name should be the [full server path](#).
2. To check that the directory exists, click **Read Directory**. If your directory is set up properly, this will bring up a list of files in the directory ready to be uploaded.
3. If you wish to upload anything from child directories as well, check **Parse child directories**
4. A **description** is not compulsory, but it's good practice to add one so that later on, when viewing, you know why files in this directory are being picked up.
5. Check **Yes** for **Active** to start automatically uploading the files from the next scheduled time. If you want to stop the automatic upload temporarily, uncheck this box and the upload will stop until you turn it back on.

File options

6. When the files are uploaded they will be placed in the **category** you assign here.
7. To choose an **author** against whose name the files will be uploaded click on the folder icon and **Assign** from the pop-up list of registered users that comes up.
8. As with any file, you can force users to log on and control who can update the uploaded files by setting **private read and write**
9. By default, files are set to a default **status** of **published**, but you can change this to whatever status wish.
10. You can **schedule** the uploaded files to change status on a specified date. [Schedule an item](#) explains how scheduling functionality works
11. **OK** saves your automatic upload.

12. **Back** cancels it

13. **Save and parse** saves the rule and executes it now.

This functionality works in version 4.0 only

Exporting

Enable Exporting to PDF

To export multiple articles to PDF or HTML files you need to:

- Install a program called **HTMLDOC**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your HTMLDOC directory. (Check your `open_basedir` PHP setting in `php.ini`)
- Ensure that PHP can run the `proc_open` function. (Check your `disable_functions`, `safe_mode_exec_dir` PHP settings in `php.ini`)
- **Buy** the export **plugin** or try it in **Demo mode**
- Add the plugin key to your KBPublisher settings

Install HTMLDOC

Note: At this time there is no commercial support for the HTMLDOC. The windows binaries can be found [here](#).

- HTMLDOC is available from <http://www.htmldoc.org>
- Download it and install it

Update the setting to point to HTMLDOC

Once you have installed HTMLDOC, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Plugins -> HTMLDOC installation path**
- Make sure the **HTMLDOC installation path** points to the directory where you installed HTMLDOC. For example: `/usr/local/bin/`.
- When you click "Save", test HTML file will be parsed and error occurs if it failed.

Buy the plugin

Export functionality is not available with the default KBPublisher package. You must purchase it separately.

Please see [this article](#) how to buy the plugin.

Add the plugin key to KBPublisher

You should have received an email with you plug-in key. If you can't find the email, you can also get this from the **My Licenses** tab in your [client area](#) on the KBPublisher website.

- Copy the license key from your client area or the email
- Log on to your knowledgebase
- Go to the **Admin Area**
- Click on the **Settings** menu
- Click on the **Plugins** tab
- Paste your key into the **Plugin key** field
- **Save**.

Test HTMLDOC from command line

To convert a single web page type:

```
$ /path_to_htmldoc/htmldoc --webpage -f output.pdf filename.html
```

Test using PHP and included test file:

```
$ cd /path/to/kbp_directory  
$ php -r "system('/ path_to_htmldoc/htmldoc --webpage -f output.pdf  
admin/extra/plugin/export/template/export_test.html');"
```

Tip:

- If you want to try the export plugin before you buy, use demo mode to get an idea of how it works.

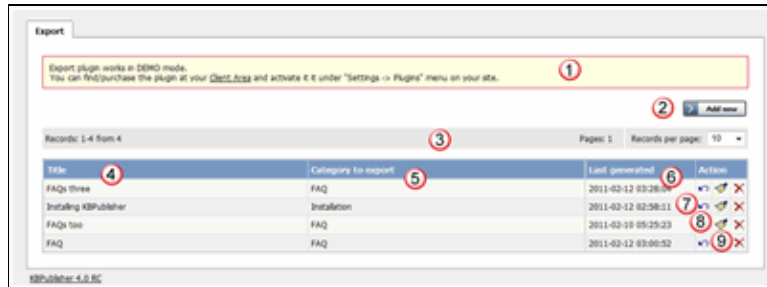
This functionality works in version 4.0 only

The Export Screen Explained

The export screen allows you to export your knowledgebase articles to html pages or PDF files.

The Summary screen

When you first enter the screen you see a summary of any current exports that have been set up.



1. Export functionality is provided as a plug-in and is purchased separately. If you have not purchased the plug-in you will get a message telling you that the plug-in works in demo mode--with some restrictions--but otherwise doesn't work.
2. **Add New** allows you to set up a new export
3. The records information line contains the usual information, like how many records there are, and how many pages of records there are
4. **Title** is the name of the export
5. **Category to export** is the top-level category that will be exported. Any sub-categories will be exported as well
6. **Last generated** shows the last time you generated documentation to export
7. The **Details** action allows you to view details of the specific export
8. The **Update** action allows you to update the export
9. The **Delete** action allows you to delete the specific export.

When you click on Add New, you are taken to the **Add New Export** screen.

The Add New Export screen

[Click here to see a full size view of the image](http://www.kbpublisher.com/images/image/manual/Export/ExportScreen_New_withNumbers_small.png)

1. Again, if you have not purchased the plug-in, you will get the message at the top of the screen.

Export options

The export options define what data you are actually going to export.

2. **Title** is the name you are giving to this particular export.
3. The **description** is displayed on the Export Details screen. Use it for information about how and why this particular document template was set up.
4. **Category to export.** You can only export one category at a time but, but all sub-categories are exported as well.
Click on the + to the right of the Category to export field to select the category.

5. **Export for user** controls which articles are exported. That is, the audience for the published document.

To export all articles in the category and in any sub-categories, irrespective of roles or privileges, choose **Admin user**. You might use this for internal documents, or even for proofing.

To export only those articles that the user sees in the Public view, without logging on, select **Not logged user**

To export articles that a user in a specified role will see, select **Logged user**. If you select this option, you also need to assign a role.

6. The **with role** field is only displayed if you if you choose to export for a logged user. Click on the + to the right of the with role box to select the role. Again, you can only select one role.
7. If you need help filling out a specific field, click on the ? for that field.

Document options

The rest of the screen is devoted to how the output is produced.

8. The **Title** is the title of the document. If you are creating a PDF this will be the front page. If you are creating an HTML page this is the name on the browser tab.
9. Check **Add to header** if you want your title on every page of your PDF.
10. The **title image** is the image that goes on the front page of your PDF document. We recommend that this image be no larger than 500x500 pixels.

These images must be in the HTML settings folder on the server. To upload an image from you local drive, click on the folder icon next to the Title image field. Once the image is on the server, select it, and **attach**. Then close the image load browser to return to the Export screen.

11. When you check the **PDF** button extra fields are displayed for you to complete. These fields are specific to the PDF output.
12. **Orientation** allows you to set the page as portrait or landscape.
13. If you intend to print the document on a double-sided printer, select **two sided**. This gives mirror-image page headings.
14. If you want your document to have a logo in header, add a **logo image**.

To add the logo, click on the folder icon next to the Title image field. Again, you can browse and upload it from a local drive if you wish.

Once the image is on the server, select it, and **attach**. Then close the image load browser to return to the Export screen.

We recommend that the logo image be no larger than 200 pixels wide by 100 pixels high.

15. You can also password protect your document by adding a **password**
16. If you choose **HTML (one page)** your document is produced as one big HTML document.
17. If you choose **HTML (many pages)** each article gets its own HTML page.
18. Click **Save** to save the template without generating the document.
19. Click **Save and Generate** to create documents as well as saving the template.

To actually view the generated document you need to go back to the Export screen and click on the template you have saved.

Export Articles

What does export articles do?

Our export functionality allows you to export all or part of your knowledgebase to a PDF or to HTML files. This is ideal if you want to create a user manual or place some of your content elsewhere.

You can export the whole knowledgebase or a single category and sub-categories, and you can use roles to tailor the articles for a specific audience.

Producing an exported document is a two-part process. First, you create an export template by defining what articles you want included and the document format. Then you generate the file. The two-part process allows you to set up the document once and regenerate any time you want to include updated content.

To create a new export template

To export:

- Click on the **Export** menu
- Choose **Add New**.

This takes you to the Export screen where you choose the following **export options**:

- Provide a **title** for the export.
- We recommend that you add a **description**. Once you have a number of exports set up this will help to identify them.
- Select a **category to export**. You can only select one category. Sub-categories will be exported as well.
If you wish to select the whole knowledgebase, select the topmost parent category. To select a category, click on the **+** to the right of the category to export field, double-click on the category to move it down to the assigned category box, and OK.
- Choose which user type to export for in **export for user**.
To export all articles in the category and in any sub-categories, irrespective of roles or privileges, choose **Admin user**.
To export only those articles that the user sees in the Public view without logging on, select **Not logged user**.
To export articles that only users in a specific role will see, select **Logged user**. If you select this option, you also need to specify a **role** as well.

If you are creating a PDF

- Add a **title**. This is displayed on the title page of the document.
- If you want the title to be displayed on the header of each page, check **Add to header**.
- If you want an image on the title page, click on the folder to the right of **Title image**. This takes you to the load image page.
If you need to, load the image from your local drive by clicking **Add New** and browsing for the file to upload it. Once your image is in the list, click **Attach**, and then close the load image popup.
- Check the **PDF** option. This opens up some new fields specific to PDF documents.
- Use the **orientation** to choose whether the document is to be in portrait or landscape mode. Default is portrait mode.
- If you intend to print the document double-sided, check **two sided**. This sets up left and right pages.

- To add a logo to the header on each page, click on the folder to the right of **logo image** and select your logo from the list. Again, if the logo you want is not in the list, you can upload it from a local drive. Once you have selected the logo, **Attach** it and close the load image popup to return to the Export screen.
- If you wish to password protect the PDF document, add a **password**.


If you are creating an HTML page or pages.

- Add a **title**. This is displayed as the tab name on html documents.
- If you want an image to be added to the title page (index.html), click on the folder to the right of **Title image**. This takes you to the load image page.
- If you want each article as a separate HTML file, check **HTML (many files)**. If you everything in a single html file, check **HTML (one file)**.

Save your settings.

- Click **Save and Generate** to save your template setup. You can reuse this setup as often as you like to generate new documents for these settings. At the same time a first copy of the document is generated.
- This returns you to the Export screen with the new export template listed

Generate the file

- Click on the **Details** action icon ()
- This takes you to the Export Details screen. In the download section is the name of the type of file, or files, that you asked to be generated.
- Click on the document type--PDF, HTML (one file) or HTML (many files)--depending on which you generated, to open it.
- Choose **open** if you want to view the file immediately.
- Choose **save** if you want to download the file to your local drive.

Tip:

- You are not limited to saving in one particular format. You can check all three options if you wish.
- If you just want to set up the export rather than generate it right now, click Save rather than Save and Generate when you have completed all the fields. This sets up the export file but doesn't generate it.
- HTML files are zipped.

This functionality works in version 4.0 only

Generate PDF or HTML file from export template

This article assumes that you have already created your export template and saved it. If you have not done this, see [Export Articles](#) instead.

To generate a document from a previously saved export file

Once you have saved an export template, you can regenerate a document any time. The new export takes the latest copy of each article from your knowledgebase

- Click on the **Export** menu
- The export templates you have created are listed.
- Select the one you want to generate new documentation for by clicking on the **Details** (↺) action icon.
- This opens the Export Detail screen with information about the template displayed. In the download section there will be one, two or three of: PDF, HTML (one file) and HTML (many files), depending on how many different formats you chose when setting up the export template.
- Click on **Generate** next to the format you want produce a document for. This creates a document, or documents, from the current knowledgebase. If this is the second or subsequent time you have generated a file, the generate date changes to the current date and time.
- Click on the file type--**PDF**, **HTML (one file)** or **HTML (many files)**--for the newly generated document.
- Choose **Open** if you want to view the generated file(s) now.
- Choose **Save** if you want to save the generated file(s) locally.

This functionality works in version 4.0 only

Export Articles from the Public Area

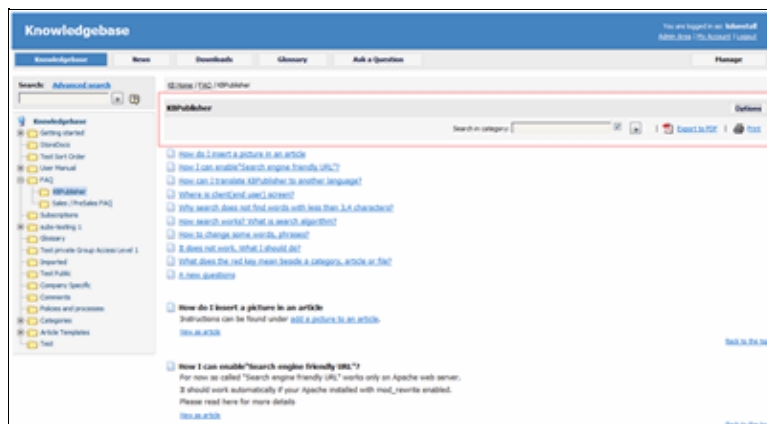
If you have purchased the export plugin, then you can set your knowledgebase up so that users can export a whole category of articles as a PDF document, or print it, from the **Public Area**.

To allow public export of articles

- Purchase the [export plugin](#) and install it
- On the **Settings** menu choose the **Plugins** tab
- Check **allow category exporting**.

To generate a PDF file or print a category from the Public Area

- Once allow category exporting is set, users will find an Options button on their screen when they view a category



- Click on the **Options** button
- This opens a new options panel which allows a user to:
 - ◆ Search for items specifically within the category they are looking at
 - ◆ Create a PDF document
 - ◆ Create a printable html page. This contains basic text without all the headings and left menu and right information block.
- The information covers all articles in the category. The user can then print or save this as required.

This functionality works in version 4.0 only

Export articles in demo mode

KBPublisher ascribes the "try before you buy" philosophy.

You can try the export plugin by using a key of **demo** key instead of a purchased key. This allows you to set up, create and test the export plugin and to work out if you want to buy it.

There are some limitations with the demo model:

- Only the first three articles for each category will be exported.
- A watermark is added to the page background.

Custom fields

Custom Fields

Custom Fields

You can customize your knowledgebase by adding custom fields. These custom fields can be defined for:

- Specific article categories
- Specific file categories
- News items
- Feedback form

For articles, the custom fields can:

- Be displayed at the top of the article
- Be displayed at the bottom of the article
- Be displayed after the rating block
- Or they can be hidden, for internal use only

For files, fields are for internal use only. That is, you can see them when you add the file, but the user cannot see them.

Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

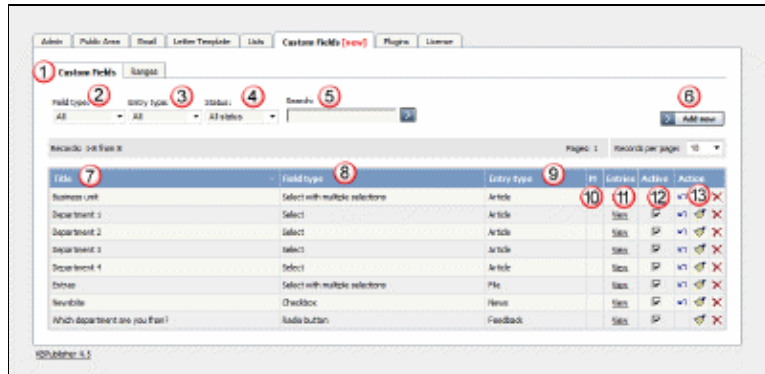
Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

The Custom Fields Tab Explained

This screen allows you to create custom fields, and to place them in your knowledgebase.

The Custom Fields tab



1. The **Custom Fields** tab allows you create and manage the fields and to control which categories or areas they are attached to. The **Ranges** tab allows you to create a set of valid values which you can then assign to one or more custom fields.
2. **Field type** is a filter that allows you to view custom fields for a specified Field types. Select your filter and then click the search/filter button to restrict the list.
3. **Entry type** is another filter. This allows you to view all custom fields associated to articles, or to files, or to news items or to feedback. Use with the search/filter button to show only fields of that type.
4. **Status** is a filter as well. This allows you to view custom fields ...
5. Or you can also search on the name of the custom field by typing the name into the **Search** fields and then clicking the search/filter button.
6. Clicking the **Add New** button allows you to create a new custom field. Note that you can only create the field to go with a specific entry type. Thus If you want to add, say, a *Department* field to both articles and files, then you would need to create two custom fields.
7. The **Title** is the name that the user sees on the screen when they add or read an article
8. The **Field type** denotes the type of field it is. Whether it's a checkbox, or a select box, or even free-flowing text
9. The **Entry type** is which area of the knowledgebase this field is used in. That is, whether it is used in articles, files, news items or feedback.
10. **M** denotes mandatory. When a field is mandatory the author creating the item cannot leave this field blank.
11. If you want to see which articles contain values in the mandatory field, click **View** entries. This takes you to a list of articles that have information in the selected custom field
12. To turn the field on so that it is able to be filled in, ensure that it is **Active**. To hide it, uncheck **Active**.
13. There are three **Action** fields: apply, edit and delete.
 - ◆ **Apply** allows you to set a value for all articles which match field criteria. This is useful when you already have existing items and want to add a value to the old items. Note that it only applies value to items that do not already have an associated custom value, so you don't have to worry about overwriting items you have already set.
 - ◆ **Edit** allows you to edit the custom field. Note that you can also double-click anywhere in the line on the field to edit as well.
 - ◆ **Delete** allows you to delete the field. If you attempt to delete a field that is being

used you will get a warning message telling you the field is being used and you will need to decide if you still wish to delete the field after that.

The Ranges tab



The ranges are the valid values you can select from. For example, you may have a list of departments, or a checkbox that allows you to denote whether extra information is required.

You can also re-use ranges. That list of departments might be a drop-down select box in your FAQ category, and a radio-button select on the feedback form.

14. **Add New** here means add a new set of valid values
15. Click on the **Title** to open the range set and add new values or edit existing ones, including re-order the fields.
16. **Description** is a description of the field range. When a user is adding a custom field, this is the text they see when they click on the inline help
17. **View** takes you to a list of custom fields that contain this range
18. The **Action** field has three options: load, edit and delete.
 - ◆ **Load** takes you to the range, so that you can edit, update or re-sort the individual valid values
 - ◆ **Edit** allows you to rename the range and update the description
 - ◆ **Delete** deletes the range. If the range is being used by custom fields, you will not be able to delete it. Use View to see which fields contain the range.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Add a new custom field

Custom fields

Custom fields are fields created by you, especially for your knowledgebase.

Adding them is a three-part process.

- First you define your field,
- Then you decide where in the database this field will be included
- Lastly, you define any valid values you wish to use.

To add a new custom field

- Click on **Settings** menu
- Select the **Custom Fields** page
- Choose the **Custom Fields** tab
- Click **Add New**
- Choose your **field type** by clicking on one of the field types.
This takes you to the **Entry Type** tab.
- Choose where this custom field will appear by clicking on an **Entry Type**. Note that if you want the field to appear for, say, both articles and files, you must create two separate fields, although you can use the same range
- If you are adding the field to articles or files, you will then be taken to the **Categories** tab and prompted for a **category**. Add any categories where the field is to be displayed. If you want the field displayed in all categories, leave this blank
- Click **Form Options** to go to the next tab if you need to. If you chose an entry type of news or feedback you should already be here
- Add the name of the field to the **Title** field
- Add a **tooltip** if required
- Check **Mandatory** if you want to force the user to fill in this field
- Check **Active** if the field is to be used immediately i.e. if you want the field to appear on the screen
- Click on the **Range** tab
- Click on **Set Range**
- If you wish to use an existing range click **Assign** to assign the range
If you wish to create a new range, click **Add New** and [add the new range], then click **Set Range** to assign the range to the custom field
- Click on the **Display Options** tab
- Use the drop-down **Display** field to choose where the field is to be displayed on the screen.
Note that when you enter the field as part of creating the article, it is always displayed under the article content. This display field defines where the text is displayed in the Public area
- If you wish you can also add some text around the field by adding it to the **HTML Template**. For example if your custom field is 'Department' and the value you input is 'Sales' then:
{title}: {value} - displays *Department: Sales*
Welcome to the {value} team - displays *Welcome to the Sales team*
Note that this extra text is not displayed if you have chosen 'Hidden, not displayed in Public Area' as the display option
- Click **OK** to create the field.

- If you have existing articles or files in the categories to which you are adding the new custom field, then you will be given the option to add a default value to those items. If you wish to add a default value, select the value.
- Click **OK**.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Add a new custom field range

What is a custom field range

A range is a list of valid values that you can use in your custom fields.

Once you have set up a range you can re-use it as many times as you like. For example, one time you might have it as a drop-down option in an article category, another time you might include it as a radio button list in the news area.

Create the range

- Click on **Settings** menu
- Select the **Custom Fields** page
- Choose **Ranges** tab
- **Add New**
- Add an appropriate name to the **Title** field, for example, Department.
- We recommend that you add an appropriate **description** as well.
- Click **OK**.
 - This adds the field and sets up ready to add each of the values. Then, for each valid value you wish to add:
 - ◆ Add the name of the value in the **Title** field
 - ◆ Add a number in the **Order** field to show where it will be placed in the list. By default this is numbered sequentially in the order that you add them
 - ◆ **OK** if you wish to add another valid value.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Update values in a custom field range

To update values in a custom field range

- Click on **Settings** menu
- Choose **Custom Fields** tab
- Choose **Ranges** tab
- Click on the name of the range that you wish to edit

From here you can

- Add new values to the range by
 - ◆ Click **Add New**
 - ◆ Add a **Title**
 - ◆ Click **OK**
- Change the name of a valid value value by:
 - ◆ Click on the edit icon of the value you wish to change
 - ◆ Update the **Title**
 - ◆ Click **OK**
- Delete existing values
 - ◆ Click on the delete icon of the value you wish to change
 - ◆ Click **OK** to confirm that you really do want to delete the value
- Reorder the range
 - ◆ Click on the edit icon of the value you wish to change
 - ◆ Type the new order into the **Order** field
 - ◆ Click **OK**

You will need to do this for each valid value in the range, as the other values do not automatically re-order themselves.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

To see where a custom field is used

To see all items where a field is used

Click on **Settings** menu

- Choose the **Custom Fields** tab
- Click on View in the **Entries** column

To see where items with a specific valid value are used

This functionality works in a similar way for articles, files, news and feedback, even though the example given here is for articles.

- Log on to the **Admin area**
- Click on **Articles** (if field is under Articles, or Files, News or Feedback if field is under, respectively, files, news or feedback)
- Click on the '+' button to the left of the category drop-down

This brings up a list of all custom fields for articles (or files/news/feedback)

- Select the specific field and value that you are looking for
- Click on **Search**.

This brings up a list of all articles with that particular custom field value.

Bulk actions available depend on your user access.

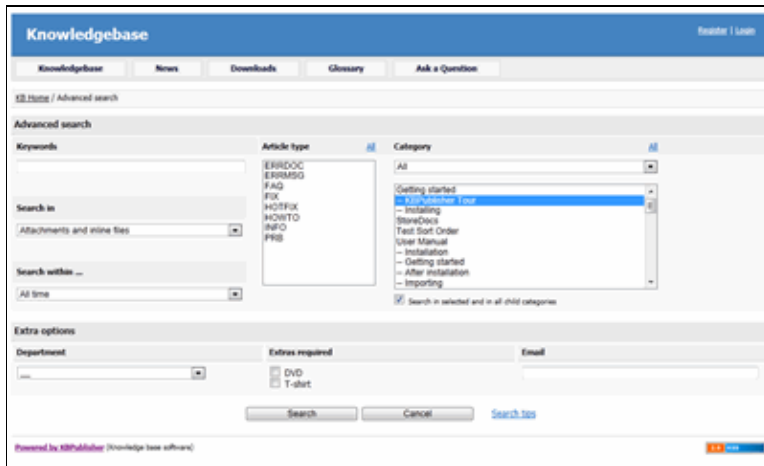
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Search in custom field in public area

You can search for data in both the [Public Area](#) and in the [Admin Area](#).

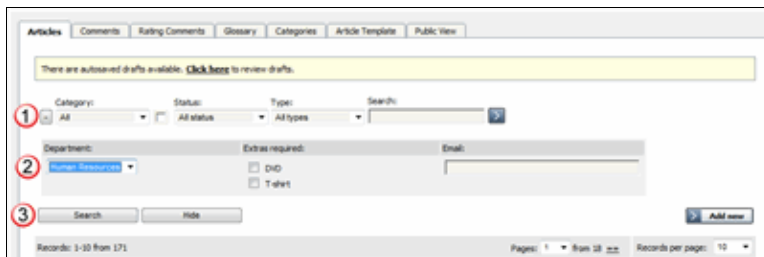
To search in the Public Area

- Click on **Advanced Search**
- From the **Search In** drop-down box, choose **Attachments and inline files**
- At the bottom of screen you will see an **Extra Options** section which contains all the custom fields



To search in the Admin Area

- Click on **Articles** (if field is under Articles, or Files, News or Feedback if field is under, respectively, files, news or feedback)
- Click on the '+' button to the left of the search area



This brings up a list of all custom fields for articles (or files/news/feedback)

The list of custom fields display by default is custom fields that are included in all categories. If you want custom fields that are listed only in a specific category, select the category

Once you have your list of custom fields

- If necessary, choose a **category**.
Categories default to 'all' and will also search in sub-categories if you use the default options
- Choose which field you wish to search on, and choose which data you wish to search for
 - ◆ If the field is a multi-choice field you will be presented with a list of drop-down

- values to select from
- ◆ If the field is a checkbox, you will be able to check the value to choose items with that flag set
- ◆ If the field is a text field, you will be able to type text into the field to search on and so on.
- Click **Search** to start the search.

This brings up a list of all articles with that particular custom field value.

Some working examples for search

Let's say you have a knowledgebase set up as follows:

Article	Category	Custom field	Valid values for custom field	Custom field defined at category level	Value in custom field
Teach yourself Photoshop	Product	Extras	DVD T-shirt Game	No	DVD
Nerds Rule	Product	Extras	DVD T-shirt Game	No	T-shirt
How to Make Cards	Product	Extras	DVD T-shirt Game	No	-
Our London Office	Branches	Retail shop	Yes No	Yes	Yes
Our Paris Office	Branches	Retail shop	Yes No	Yes	Yes
		Extras	DVD T-shirt Game	No	T-shirt

No valid value has been set for the article *How to make cards*. Also, *Extras* can be defined anywhere.

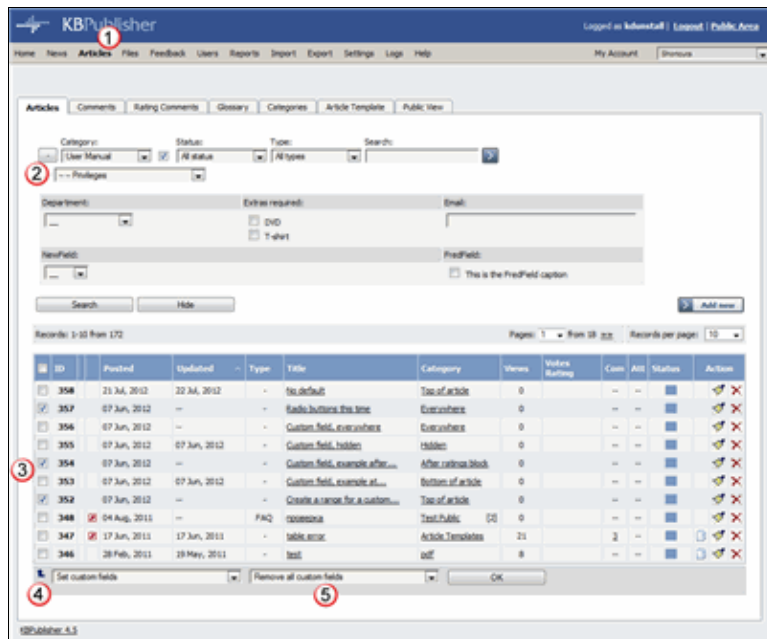
- If you click on search without defining any further parameters this brings back a list of all articles which contain values in any custom field, hence it would return:
 - ◆ *Teach Yourself Photoshop*
 - ◆ *Nerds Rule*
 - ◆ *Our London Office*
 - ◆ *Our Paris Office*
- If you select *T-shirt* in the *Extras* custom field, and then click on search (still not having defined any further parameters, or using *All*), this will bring back:
 - ◆ *Nerds Rule*
 - ◆ *Our Paris Office*
- If you select *T-shirt* in the *Extras* custom field, and choose the *Product* category, this will bring back:
 - ◆ *Nerds Rule*

- If you choose *T-shirt* in the *Extras* custom field, and *Yes* in the *Retail Shop* field, and search all levels, then your search will return:
 - ◆ *Nerds Rule*
 - ◆ *Our London Office*
 - ◆ *Our Paris Office*

This last is because it will search for either field, rather than both fields.

Bulk add or update custom fields

To bulk add or update custom fields, log on to the and Admin area and then:



1. If you are updating:

- an article custom field, click on the **Articles** menu
- a file custom field, click on the **Files** menu
- a news custom field, click on the **News** menu
- a feedback custom field, click on the **Feedback** menu

2. By default, the listing displays all custom fields that are not assigned for specific categories.

To see fields assigned to a specific category, select the category you wish to search on. This displays all custom fields for the category, plus any custom fields that are not assigned to a specific category.

3. Select the items whose custom fields you wish to update.

4. Choose **Set custom fields** from the **Actions with selected** drop-down.

5. This brings up a second drop-down box for you to select from.

6. If you wish to:

Remove any custom fields set:

- ◆ Choose **remove all custom fields** from the second drop-down box
- ◆ Click **OK**

Update a single custom field:

- ◆ Choose the custom field from the second drop-down box
- ◆ This brings up the fields associated with the category beneath the drop-down
- ◆ If the field is not currently associated with the item(s), this brings up a check-box **add to existing**
- ◆ If you wish to add the field to the selected items, check this box
- ◆ Update the field as required

- ◆ Click **OK** to save the change

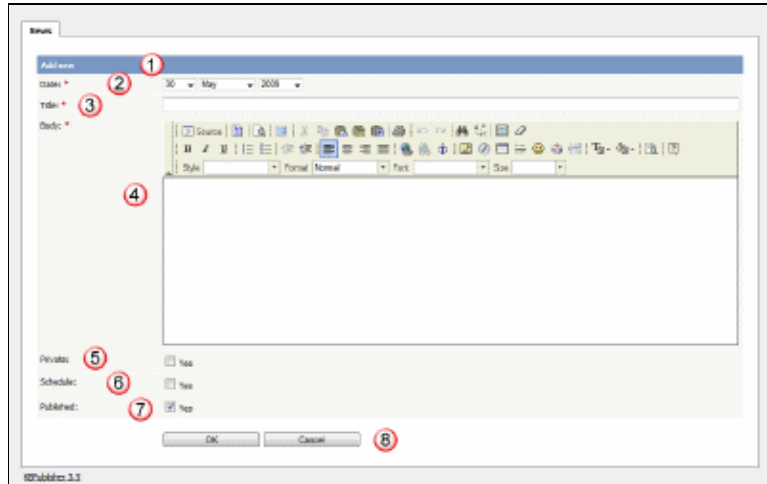
Update all the custom fields at the one time:

- ◆ Choose **set all custom fields** from the second drop-down box
- ◆ This brings up the fields associated with the category beneath the drop-down
- ◆ Update fields as required
- ◆ Click **OK** to save the changes.

News

News functionality in KBPublisher

The News Input Screen Explained



1. The blue line at the top of the screen denotes whether you are adding a new news item or editing an existing one.
2. The **Date** is the news date displayed on the Public area screen.
3. The **Title** is the news heading.
4. **Body** is the news article itself.

Note that on the Public area home page the user only sees the first 200 characters of this. They click on the news heading to open the news item and see the rest..

5. Checking the **Private Read** option allows you to force users to log on to see the news item. Checking **Private Write** allows you to control who can edit the news item. Checking both gives you control over who can read it, whether they have to log on, and who can update it.

Designating that a news item is private brings up a list for you to choose **Access for selected roles only**. This allows you to assign which groups of users (users in which roles) can actually read the news item. Choose **None** if you just wish to make the news private (so they have to log on) but still want everyone to be able to read it. Otherwise, choose the role(s) that can see or update this item.
6. Checking the **Schedule** option allows you to dictate a date and time for when a news item is published and when it drops off the news list.

When you check **Yes** to the Schedule option it brings up a date and time, and allows you to determine whether the news item is to be published or not published at that time. An **And** option allows you to specify a second date/time and status to schedule.

7. Use the **Published** option to specify whether users can read the article or not.

You would often use this in conjunction with scheduling. For example, you may set a news item so it is not (**Published** option not checked) and schedule it to be published on a specific date and time.

8. The **OK** and **Cancel** buttons are standard. **OK** means save the news item, **Cancel** means exit and don't save.
Save as new means save the news item as a new one. This is effectively a copy.

This functionality works in version 3.5 and above

Add News Item

The quickest way to add a news item to use the **Shortcuts** menu at the top of your screen:

- Click on the drop-down menu in the top right of the screen and choose **Add News** .

Or you can do it via the **News** tab in the Admin Area.

- Click on the **News** menu
- Click on **Add New**.

Once you are on the news screen you must complete the following sections:

- Add a **Date** for your news item
- Add a **Title**. This is the heading displayed on the public screen
- Type your news item in the **Body** editing box
- Specify whether the news item is **Published** or not.

The following items are optional:

- To force users to log on to read the news item, mark it as **Private**
- To publish or change to not published at a future date, **Schedule** it

You can find out more about each of these fields and how they work in [The News Screen Explained](#).

Once your news item is complete:

- Click **OK** to save it.

Tips:

- If you leave this page before you click OK, your news item will not be saved.

This functionality works in version 3.5 and above

Edit news item

To edit a news item, including changing the date, changing the text, schedule and whether an article is published or not published and private or not private:

- Choose **News** menu
- Click on the paintbrush, which is under **Actions**, for the item you wish to edit.

You can find out more about each of these fields and how they work in [The News Screen Explained](#).

If you wish to simply change the news item to published or not published:

- Choose **News** menu
- Check or uncheck the **Status** option.

You can also use the bulk update option to set a news item as private/not private and published/not published or to delete it. Using this feature, you can update more than one news item at a time.

This functionality works in version 3.5 and above

Delete news item

To delete a single news item:

- Choose **News** menu
- Click on the **News** tab
- Click on the red '**X**', which is under Actions, for the article you wish to delete.

To delete one or more news items:

- Choose **News** menu
- Click on the **News** tab
- Check the Actions with selected check box to the left of each article you wish to delete
- Choose **Delete** from the **Actions with selected** box at the bottom of the screen
- Click **OK**
- **OK** again to confirm that you really do want to delete these articles.

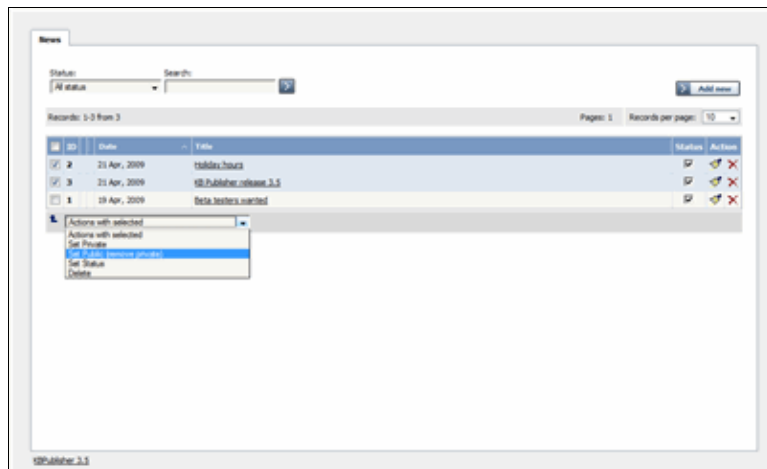
This functionality works in version 3.5 and above

Bulk update news items

KBPublisher allows you to bulk update news items to:

- Publish news items or set them to not published
- Make news items private or public
- Schedule news items
- Set custom fields
- Set news status
- Delete news items

You can do this direct from the **News** menu, **News** tab.



To update the news items:

- Check one or more news items to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

This functionality works in version 3.5 and above

Subscribe to news

To be notified when news items are added to the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Subscribe**

You will be notified daily of changes to news items.

This functionality works in version 3.5 and above

Unsubscribe from news

To no longer receive notifications about updates to the news area of the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Unsubscribe**

This functionality works in version 3.5 and above

Schedule an Item

Scheduling an article, news or file allows you to set a date that the item is made visible to users in your knowledgebase and/or a date that it stops being visible.

For example, suppose your company is closed for the Christmas/new year holiday periodâ say it is closed from 12 noon on 24 December and re-opens at 9 am on the 2nd of January.

- You add a news item to say that you will be closed over this period. When you create it (on 18 December, say), you set its status to "Not Published"
- You schedule this news item to change status to "Published" at 12 noon on 24 December, and to change status again to "Not Published" at 9am on 2 January.

Or suppose you have a new software release being implemented. You can create new articles for the new functionality in the software before the release. Give these articles a status of 'Not published', and then schedule them to be published on the assigned release date.

To schedule the item:

- Create or edit the article, file or news
- If you are scheduling an article, click on the **Advanced** tab (you don't need to do this for files or news items)
- Check **Yes** to the **Schedule** option
- This expands the Schedule options

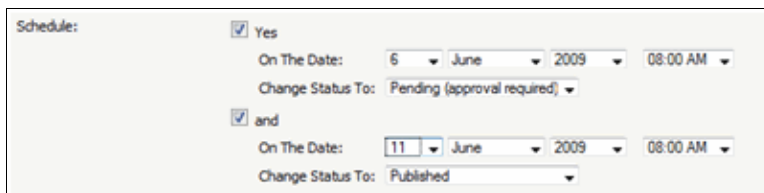


The screenshot shows a 'Schedule:' section with a 'Yes' checkbox checked. Below it, there is a date and time selector set to '9' for the day, 'October' for the month, and '2009' for the year, with a time dropdown set to '08:00 AM'. A 'Change status to:' dropdown is set to 'Not published'. There is a text area for 'Notes' and an 'and' checkbox which is currently unchecked.

- Add a date and time to the **On the Date** fields to set the date and time that the item is to change status
- Use the **Change Status To** for determining whether the item is to be published or not published. (Articles have two further statuses, pending and draft.)
- Add a **Note** to explain why this item was scheduled on this date. Use it as a reminder or as a record of what happened.

If you wish, you can set a second date and time to change to another status:

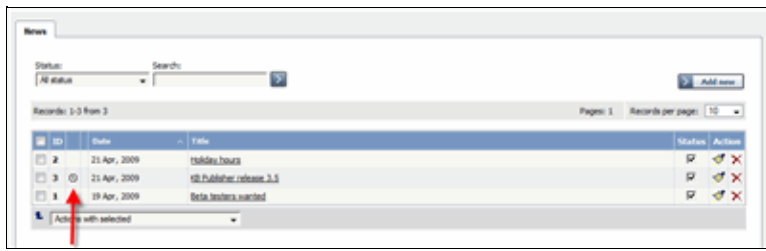
- Check the **And** checkbox
- This brings up a second set of date and status options



The screenshot shows the 'Schedule:' section with both 'Yes' and 'and' checkboxes checked. The first date and time selector is set to '6' for the day, 'June' for the month, and '2009' for the year, with a time dropdown set to '08:00 AM'. The 'Change status to:' dropdown is set to 'Pending (approval required)'. The second date and time selector is set to '11' for the day, 'June' for the month, and '2009' for the year, with a time dropdown set to '08:00 AM'. The 'Change status to:' dropdown for the second entry is set to 'Published'.

- Add a date and time to the second **On the Date** fields to set the date and time that the item is to change status
- Use the second **Change Status To** for assigning the new status
- Add a second note if required.

Items that are scheduled have a small clock next to the article/file/news ID on the list screens.



Tip:

- You can also use bulk actions to schedule or remove schedules.

This functionality works in version 3.5 and above

Remove scheduling

To remove scheduling from an article, file or news:

- Edit the item
- Uncheck the **Schedule** checkbox

You can also use the bulk actions option to remove scheduling from multiple articles or files:

- Select each item to be un-scheduled
- Choose **remove schedule** from the **Actions with selected** options at the bottom of the screen.

This functionality works in version 3.5 and above

Articles

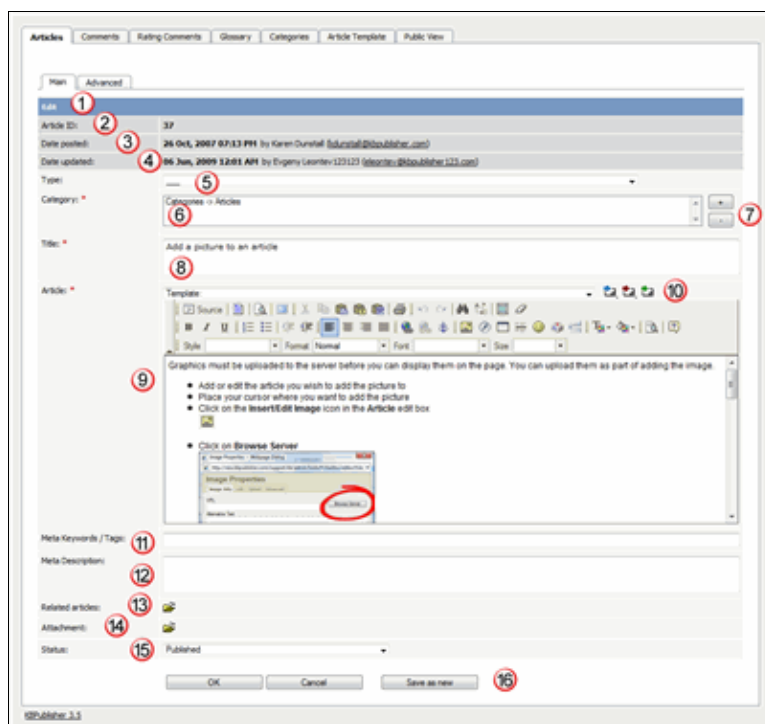
Articles

Information about Articles, how they work and how to add and update them.

The Article Input Screen Explained

The article screen is divided into two tabs. A **Main** tab, which is what you use to create the article, and an **Advanced** tab, where you set external links, the order of the article inside a category and whether or not the article is published. The Advanced tab also allows you to schedule articles for publication.

The Main tab



1. The blue line at the top of the screen denotes whether you are adding a new article, or editing an existing one.
2. If this is an existing article, it will have an **Article ID**. This is the record number under which the article is stored in the database. This line also contains a link to public area, so you can see the article as a user sees it, and a link to the history, where you can view prior versions.
3. It will also show the date the original article was created in **Date Posted**, and who created the article
4. The **Date Updated** field shows the last time the article was updated, and who updated it
5. **Type** is has two purposes. It is used to group records for searching and it can also provide a default template for the article. It is not compulsory. If you want to remove a type you have already included, set the Type back to the first item in the drop-down list ().

Articles types can be managed in *Settings->Lists->Article Type*.

6. **Category** controls where the article will be placed in the knowledgebase. It is, effectively, the menu or the table of contents. Note the red '*' to the right of the word 'Category'. This means that this field is compulsory. Note also that some of the categories are red. These categories are private categories. When you select a private category, KBPublisher lists roles and restrictions beneath the category list so that you know which users can access the article.
7. You add or remove categories by clicking on the + and - buttons
8. **Title** is the heading that goes on the page, and also the link that is displayed under the category (table of contents). It, too, is compulsory.
9. The **Article** is the content that people read. Again, it's compulsory. Type your article into the edit box. Move your mouse over each of the icons in the edit toolbar to see what each one does, or you can read about each function in [edit toolbar explained](#).
10. **Templates** can be inserted into the text by choosing the template from the drop-down list and then clicking on Insert, Replace or Include template. [Using templates in articles](#) describes how templates work and how to use them.
11. **Meta Keywords / Tags** are search words. If you define a keyword here and a user then searches using that keyword, this article is displayed. Use a comma to separate each keyword.
Some external search engines may also use this for search engine optimization.
12. The **Meta Description** is a brief summary of what is on the page. This description is often used by search engines when displaying details of a page.
13. You can easily cross reference other articles in your KBPublisher database by choosing **Related articles**. You can link to text within the article, or you can add a link that is displayed under the heading 'Also read' at the bottom of the page. [How do I add a link to an article](#) explains the process in more detail.
14. You can link to files in your KBPublisher database by choosing **Attachment**. Again, you can add it as a link to text within the article, or you can add the link at the bottom of the page under the heading 'Attached files'. [Attach a file to an article](#) explains this in more detail.
15. Use the **Status** to specify whether this article is published, meaning users can read it, not published, or pending (approval required).
Articles statuses could be managed in *Settings->Lists->Article Status*.
16. The **Revision comments** box is only displayed once you start editing the content of the article. Use this to add comment version history information. When you look at the history, these comments will help you remember what was changed for this version.
17. The **OK** and **Cancel** buttons are standard. **OK** means save the article, **Cancel** means exit but don't save.
Save as new means save the article a new one. This is effectively a copy.

The Advanced tab

The screenshot shows the 'Advanced' tab of the KBPublisher 3.3 interface. It features several input fields and controls:

- 1**: A text input field for the article title.
- 2**: A text input field for external links.
- 3**: A dropdown menu for selecting a category, currently showing 'Categories -> Articles: E AFTER: The HTML editor toolbar explained'.
- 4**: A checkbox labeled 'Private'.
- 5**: A checkbox labeled 'Schedule'.
- 6**: A dropdown menu for the article status, currently set to 'Published'.
- 7**: A button labeled 'Save as new'.

 The interface also includes standard 'OK' and 'Cancel' buttons. The top navigation bar shows 'Articles', 'Comments', 'Rating Comments', 'Glossary', 'Categories', 'Article Template', and 'Public View'. The bottom left corner indicates the version 'KBPublisher 3.3'.

1. Again, the blue bar tells you whether you are editing an existing article or creating a new one.
2. You can add links to other web sites by adding them to the **External links** field. Type or paste the address (URL) of the page you want to link into the field. These then appear at the bottom of the article under the heading 'External Links'.

You can append an optional title to each link using a pipe symbol to separate the url and title.

Use an to separate links. Links must begin with http://.

e.g. <http://kbpublisher.com> | KBPublisher

3. The categories you have selected for the article are listed in the **Order** field, along with a drop-down list of where to place the article within the category. There is one order list for each category you have chosen.
4. Checking the **Private Read** option means that the user must log on to read the article. Checking the **Private Write** option allows you to restrict who can edit the article.

Designated that an article is private brings up a list for you to choose **Access for selected roles only**. This allows you to assign which groups of users (users in which roles) can actually read the article. If you just wish to make the article private but still want everyone to be able to read it, choose **None**.

5. You can **Schedule** articles to be published or not-published at a specified date and time.

Checking the Schedule box brings up date, time and status fields. Fill these in to schedule that the article will change status on that date. You can specify one or two schedule dates. Schedule an item explains this in more detail.

6. You can save your article on the Main tab or on the Advanced tab. The **OK** and **Cancel** buttons are standard. **OK** means save the article, **Cancel** means exit but don't save. **Save as new** means save the article a new one. This is effectively a copy. **Save and continue editing** allows you to save the document but remain on the edit page to make more changes.


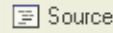








The HTML editor toolbar explained











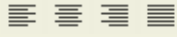













The text editor of KBPublisher is an FCK Editor.

You can edit the text as text (wysiwyg), or if you are familiar with HTML, you can edit the source HTML.



A summary of each command

Command	What command does
	Hides the toolbar to give you more editing space. Click again to re-display the toolbar.
	Allows you to edit the HTML source of the article.
	Controls the templates. Note that this is similar functionality to the templates drop-down menu above it, but the way you insert the template is slightly different (even though the end result is the same). See using templates with articles for more detail about this.
	Displays the page as HTML. i.e. As the users might see it.
	Maximize the editor. This gives you a larger area to type into. Click again to return to normal.
	Cut the highlighted text to the clipboard. The first time you cut or copy in an article you may be asked to allow access. Click OK.
	Copy the highlighted text to the clipboard. The first time you copy or cut in an article you may be asked to allow access. Click OK.
	Paste the text you copied. Any formatting will be included.
	Paste the text you copied as plain text. No formatting will be included. For example, if the text you copied was bold this paste will remove the bold.
	<p>Copy content from Microsoft Word.</p> <p>Documents created in Microsoft Word produce messy HTML, with lots of unnecessary tags. This paste allows you to clean up some of those tags. To use it:</p> <ul style="list-style-type: none">• Copy the text from your Word document• Click on the Paste from Microsoft Word icon. This brings up a pop-up box• Use <Ctrl><V> to paste the text you copied into the box• Check Ignore font face definitions if you don't want the font data carried across• Check Remove Styles definitions if you want to remove the Microsoft styles• Click Clean up box to remove unwanted tags• Then click OK to copy the text back into your KBPublisher article.

	Print the HTML page.
	Undo or redo.
	Find text in the article.
	Replace text in article.
	Select all.
	Remove any formatting.
	Format the text as bold, italic or underline.
	Create a numbered list.
	Select all of the text in the HTML page (usually used before copy or cut, or to apply a style or format to the whole page).
	Indent text or remove indent.
	Align the text. Alignment options are left aligned, centered, right aligned or justified.
	Insert or remove a link.
	Insert an anchor.
	Insert a picture. You can find out more about inserting images in add a picture to an article .
	Insert a Flash animation into your document. Works similar to adding a picture.
	Insert a table. Clicking on insert table brings up a pop-up box that allows you to set the table properties.
	Inserts a horizontal line into the text. (The html <hr/>)
	Insert emoticon. Brings up a list of common smileys for you to choose from.
	Allows you to insert special characters such as copyright or trademark symbols, or em and en dashes.
	Inserts a page break into the text.
	Change the color of any highlighted text.
	Change the background color of any highlighted text.
	Show blocks.
	Gives information about the editor.
Style <input type="text"/>	Choose a style. This allows you to select a style from those defined in admin/tools/fckeditor_custom/fckstyles.xml.
Format <input type="text"/>	Select one of the standard pre-defined styles.
Font <input type="text"/>	Select a font for your text.

Size ▼

Select a size for your text.

The editor also allows you to use some standard control key combinations as well, in particular:

- **<Ctrl><X>** for cut
- **<Ctrl><C>** for copy
- **<Ctrl><V>** for paste
- **<Ctrl><Z>** for undo
- **<Ctrl>** for bold
- **<Ctrl><I>** for italic.

Add an Article

If you are in the Public area, the quickest way to add an article is via the button in the top right of your screen:

- Click on **Add article**

If you are in the Admin area, another fast way is to use the **Shortcuts** menu at the top of your screen:

- Click on the drop-down menu in the top right of the screen and choose **Add new article**.

Or you can do it via the **Articles** tab.

- Click on the **Articles** menu
- Choose the **Articles** tab
- Click on **Add New**.

Once you are on the article screen you must complete the following sections:

- Choose where you want the knowledgebase article to be displayed by adding a **Category** or categories
- Add a **Title**. This is the heading displayed on the knowledgebase screens and in any menus/table of contents.
- Type your article in the **Article** editing box.

The following items are optional:

- To help users search within your database, include a **Type** and **Meta Keywords**
- To optimize web search add **Meta Keywords/Tags** and a **Meta Description**
- To add links to other web sites, include **External links**
- To add links to other articles in the KBPublisher database, include them as **Related articles**
- To add links to files, include them as **Attachments**
- To force users to log on to read an article, mark it as **Private Read**. To restrict who can read the article mark it as private read and then assign specific roles which can access it. To restrict who can edit the article, mark it as **Private Write**.
- To say where in the list the article is placed, specify the **Order**
- Use the **Status** field to make the article available to read.

You can find out more about each of these fields and how they work in [The Article Screen Explained](#).

Once your article is complete:

- Click **OK** to save it.

Tips:

- If you leave this page before you click OK, your article will not be saved.
- If you have a number of articles to add from another database, say, you may want to import articles instead of adding them.

Update an article

There are two ways to get to the update article screen.

One way is to:

- Choose **Articles** menu
- Click on the **Articles** tab
- Click on the paintbrush, which is under **Actions**, for the article you wish to edit.

The other way is to

- Click on the article to view it
- Click on **Edit Article** if you wish to update the article contents and/or other information such as categories, meta tags and private. Or if you simply wish to update the text, click on **Quick Edit**.

You can find out more about each of these fields and how they work in [The Article Screen Explained](#).

You can also use the [bulk update option](#) to update the categories, type, meta tags, status and description. Using this feature, you can update more than one article at a time.

Delete an Article

To delete a single article:

- If you are in the Public area, click on the **Admin Area** link
- Click on the **Articles** tab
- Click on the red '**X**', which is under Actions, for the article you wish to delete.

To delete one or more articles:

- If you are in the Public area, click on the **Admin Area** link
- Click on the **Articles** tab
- Check the Actions with selected check box to the left of each article you wish to delete
- Choose **Delete** from the **Actions with selected** box at the bottom of the screen
- Click **OK**
- **OK** again to confirm that you really do want to delete these articles.

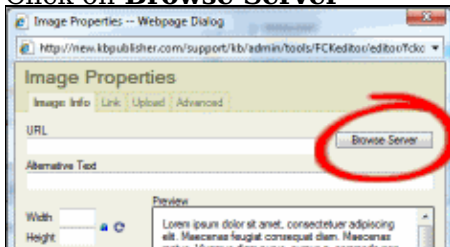
Add a Picture to an Article

Graphics must be uploaded to the server before you can display them on the page. You can upload them as part of adding the image.

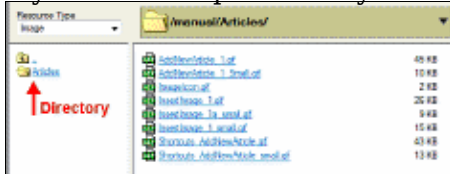
- Add or edit the article you wish to add the picture to
- Place your cursor where you want to add the picture
- Click on the **Insert/Edit Image** icon in the **Article** edit box



- Click on **Browse Server**

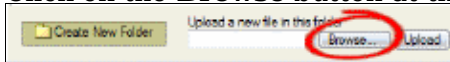


- Go to the directory on the server where the image is now, or where you want to place it if you haven't uploaded it yet

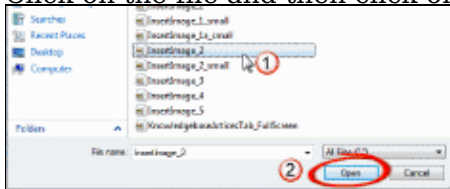


If you have not yet uploaded the picture

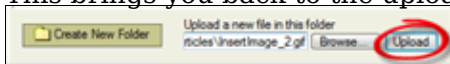
- Click on the **Browse** button at the bottom of the screen



- Browse to find the file you want to upload
- Click on the file and then click on **Open**



- This brings you back to the upload screen. Click **Upload**



- The name of the picture appears in the list of files

Once the picture is loaded onto the server

- Click on the name of the file you want to upload



- This takes you back to the Image Properties box with the address of the file in the **URL** line. You will see a preview of the picture in the **Preview** window.
- This is the minimum you need to do to add the picture. You can optimize it by adding alternative text, resizing it, adding borders or margins, adding links or modifying the

style.

- Click **OK** to add the picture to the article.

Tip

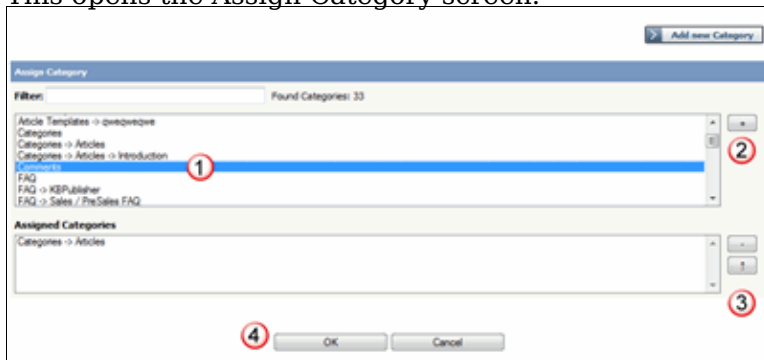
- You can "**drag and drop**" an image to be added to the end of an article.

Assign category to article

Assigning a category to an article is a two-part process. First you assign the category, and then you define the order the item is displayed in that category.

To assign the category

- Create or edit the article
- Click on the plus (+) button on the right-hand side of the category field. This opens the Assign Category screen.



- Select the Category from the list of categories (1)
- Click on the **plus (+)** button at the right-hand side to add this category to the list of assigned categories (2)
- If you wish this category to be the default category, then select the category in the Assigned list and then click on the **Set Default** button (3) to make this the default category
- Click **OK** to save your changes and exit from the Assign Category screen

You can add multiple categories.

On the Assign Category screen you can also:

- **Filter** the list to reduce the number of categories displayed
- Add a new category by clicking the **Add New Category** button
- Remove existing categories by clicking on them in the **Assigned Categories** box, and then clicking on the **minus (-)** button.

Tips:

To quickly assign a category you can:

- Double-click on the category, or
- Click on the category, then press <Shift> and <Enter>

To quickly unassign a category you can:

- Double-click on the assigned category.

To display only top categories you can:

- Type *top:* in **filter** field

Link to another article (related articles)

To add a link inside the text, like this:

- Add or edit the article to which you wish to add the link
- Highlight the text to be linked
- Click on the add new **Related articles** icon
- Find the record you wish to link to
- Click on **Insert** (this is in the **Action** column).

To attach a link to the article. This link appears at the bottom of the screen, under the sub-heading '**Also read**'.

- Add or edit the article to which you wish to add the link
- Click on the add new **Related articles** icon
- Find the record you wish to link to
- Click on **Attach** (this is in the **Action** column).

Once you have attached a link to an article at the bottom of the screen you can also quickly add the link into your text as well.

- Open the article which has the attached link
- Highlight the text to be linked
- Click on **Insert** under **Related articles**.

Tip

- When you add a link to another page, the page that you link to also includes a link back to this page under the '**Also Read**' heading by default. However, you can turn this back link off by removing the tick from the **cross reference** checkbox for that link.
- If you have problems inserting a link, check that you are not trying to *attach* an article. If you highlight text you should be inserting, rather than attaching. If you want to do both, attach first, and then highlight your text and use the Insert under Related Articles.

Attach a file to an article (attachment and inline link)

Once you have uploaded files, you can add links to them in your articles, much the same way as you can link to other articles. This allows you to load a file once, but refer to it as many times as you wish.

To add a link to the file inside the text, like this:

- Add the file
- Add or edit the article to which you wish to add the link
- Highlight the text to be linked
- Click on the add new **Attachment** icon
- Find the file you wish to link to
- Click on **Insert** (this is in the **Action** column).

To add a link to the file so that the link appears at the bottom of the screen, under the sub-heading '**Attached Files**'.

- Add the file
- Add or edit the article to which you wish to add the link
- Click on the add new **Attachment** icon
- Find the file you wish to link to
- Click on **Attach** (this is in the **Action** column).

Once you have attached a file at the bottom of the screen you can also quickly link it to your text as well.

- Open the article which has the attached file
- Highlight the text the file is to be linked to
- Click on **Insert** under **Attachments**.

Tip

- If you have problems inserting a file, check that you have not highlighted text and are trying to attach the file. If you highlight text you should be inserting, not attaching. If you want to do both, attach first, and then highlight your text and use the Insert under Attachments.

Article history

KBPublisher keeps a history of all changes you make to the content of an article. You can view earlier versions and compare them against the current version to see what has changed and you can roll back to earlier versions

By default, version control is turned on, and set to store up to ten revisions.

To turn off version control

- Click on **Settings** menu
- Choose the **Admin** tab
- Set the **maximum number of revisions** to 0

To change the maximum number of versions stored

- Click on **Settings** menu
- Choose the **Admin** tab
- Set the **maximum number of revisions** to the number of versions you want retain.

To recognize if an article has prior versions

- Click on the **Articles** menu
- Choose the **Articles** tab
- Find the article in the list
- You will see a **history icon** under Actions on the articles tab.



- If you move your mouse over the history icon, it will tell you how many versions this article has.

To view earlier versions of an article

- Click on the history icon
- This takes you to the article History screen, where you can view and manage versions.

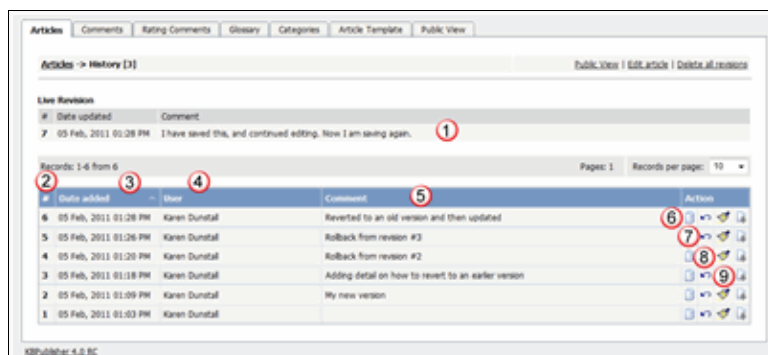
Tip

- Only changes to content are stored. If you modify the category or title, or update metadata, this is not stored in the version history.

This functionality works in version 4.0 only

The article history screen explained

The History screens shows all versions of an article. From here you can compare earlier versions with the current one, revert to earlier versions, delete versions and you can download a copy of a specific version.



1. **Live Revision** shows information about the current version. Version number, date it was last created and any revision comments. When comparing versions, this is the version you compare against.
2. Revision number is a sequentially allocated number. Each time you save the article, this number increments.
3. Date added is the date and time the version was created.
4. And who it was created by.
5. When you create a version you also add a revision comment.
6. **View changes** opens the version and compares it side-by-side against the live version. Changes in each document are highlighted.
7. **Rollback** allows you to revert to a previous version. This then becomes the live version, while the formerly current version becomes another historical version.
8. **Load revision to update** opens the article for editing. When you save the edited article this becomes the new current version.
9. **Download** allows you to save the article (live version and an historical one) to your hard drive and compare it in your favorite compare tool. The file is saved as HTML.
10. **Public view** displays the current live article in the public view.
11. **Edit article** opens the current live article for editing.
12. **Delete all revisions** deletes all historical versions, leaving only the current version.
Note that if you wish to delete an historical version, load the revision to update.

This functionality works in version 4.0 only

Autosave

Articles are saved automatically at intervals.

For example, suppose you are called away from your desk in the middle of creating a new article. You don't expect to be away long, so you don't save. An hour later you come back to your desk to find your session has timed out. All that work lost.

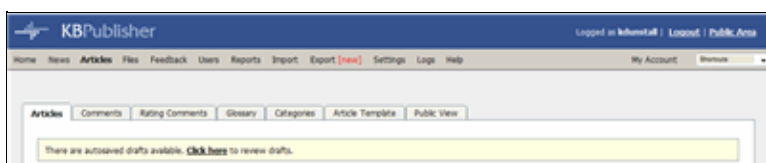
Not quite.

Provided the administrator has turned autosave on, you can get your changes up to the last time the article was autosaved.

If you have not yet saved the article

If you were creating a new article and had not yet saved it, you can see it on the Articles tab

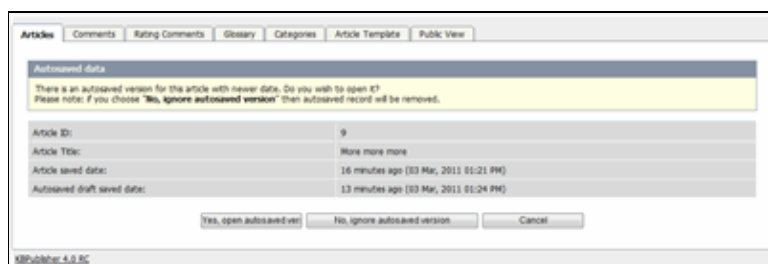
- Log on and go to the **Admin** area
- Click on the **Articles** menu
- Choose the **Articles** tab
- If there are any unsaved autosaved documents you will see a note at the top of the articles tab telling you that there are unsaved drafts.
- Click on the **click here** link to view the autosaved document(s).



- Only the author can see the autosaved document

If you are editing an existing article

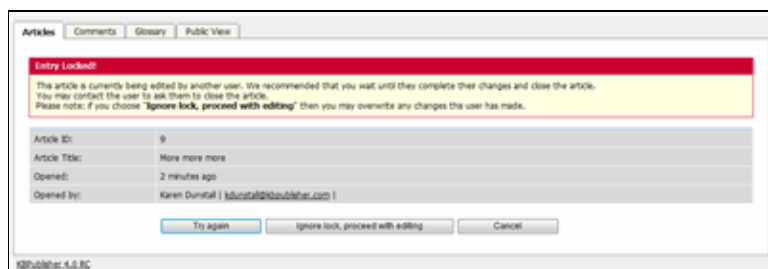
If you open an existing article for editing and for some reason the article was not saved correctly, or an error occurs on the save, then when you next open the article for editing you will see the following message:



- If you want to use the auto-saved version, click on **Yes, open autosaved version**.
- If you want to revert back to the old version, click on **No, ignore autosaved version**, which opens the version without your edits
- When you **Save** the article this new version becomes the current version and the autosave history is deleted.

Articles being edited by another user

When you open an article that is already being edited by another user you get a warning message telling you that someone else is working on the same document and that there are unsaved changes.



From here you can choose to:

- Wait until later to edit the article.
If you want to do this, click **Cancel** and come back at another time.
- **Try again**, to see if the user has since closed the document.
If the document is still being edited, you will get the same message.
If you wish to contact the person who was editing the article and to ask them if they are finished and if so will they please save the document the **Opened By** information tells you who is currently editing the article.
- Or you can **ignore lock and proceed with editing** which overwrites anything the other user has done.
Be aware when you do this that other author can also save over your work. The person who saves last is the one whose article becomes the final article.

Schedule an Item

Scheduling an article, news or file allows you to set a date that the item is made visible to users in your knowledgebase and/or a date that it stops being visible.

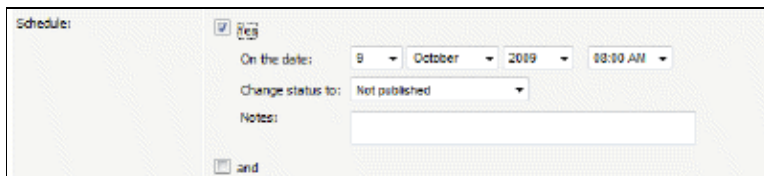
For example, suppose your company is closed for the Christmas/new year holiday periodâ say it is closed from 12 noon on 24 December and re-opens at 9 am on the 2nd of January.

- You add a news item to say that you will be closed over this period. When you create it (on 18 December, say), you set its status to "Not Published"
- You schedule this news item to change status to "Published" at 12 noon on 24 December, and to change status again to "Not Published" at 9am on 2 January.

Or suppose you have a new software release being implemented. You can create new articles for the new functionality in the software before the release. Give these articles a status of 'Not published', and then schedule them to be published on the assigned release date.

To schedule the item:

- Create or edit the article, file or news
- If you are scheduling an article, click on the **Advanced** tab (you don't need to do this for files or news items)
- Check **Yes** to the **Schedule** option
- This expands the Schedule options

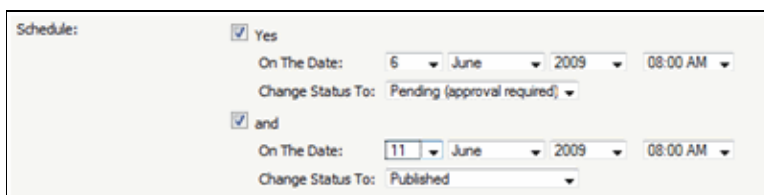


The screenshot shows a 'Schedule:' section with a checked 'Yes' checkbox. Below it, there are three dropdown menus for 'On the date:' set to '9', 'October', and '2009', followed by a time dropdown set to '08:00 AM'. Below that is a 'Change status to:' dropdown set to 'Not published'. At the bottom, there is a 'Notes:' text area and an unchecked 'and' checkbox.

- Add a date and time to the **On the Date** fields to set the date and time that the item is to change status
- Use the **Change Status To** for determining whether the item is to be published or not published. (Articles have two further statuses, pending and draft.)
- Add a **Note** to explain why this item was scheduled on this date. Use it as a reminder or as a record of what happened.

If you wish, you can set a second date and time to change to another status:

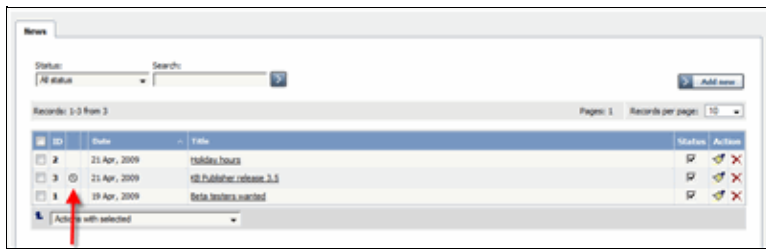
- Check the **And** checkbox
- This brings up a second set of date and status options



The screenshot shows the 'Schedule:' section with the 'Yes' checkbox checked. The first scheduling option has 'On The Date:' set to '6', 'June', '2009' and '08:00 AM', with 'Change Status To:' set to 'Pending (approval required)'. Below this, the 'and' checkbox is also checked, followed by a second scheduling option with 'On The Date:' set to '11', 'June', '2009' and '08:00 AM', with 'Change Status To:' set to 'Published'.

- Add a date and time to the second **On the Date** fields to set the date and time that the item is to change status
- Use the second **Change Status To** for assigning the new status
- Add a second note if required.

Items that are scheduled have a small clock next to the article/file/news ID on the list screens.



Tip:

- You can also use bulk actions to schedule or remove schedules.

This functionality works in version 3.5 and above

Remove scheduling

To remove scheduling from an article, file or news:

- Edit the item
- Uncheck the **Schedule** checkbox

You can also use the bulk actions option to remove scheduling from multiple articles or files:

- Select each item to be un-scheduled
- Choose **remove schedule** from the **Actions with selected** options at the bottom of the screen.

This functionality works in version 3.5 and above

Add an article as a result of user feedback

Sometimes, feedback from a user generates an idea for another article. You can create this article direct from the feedback page.

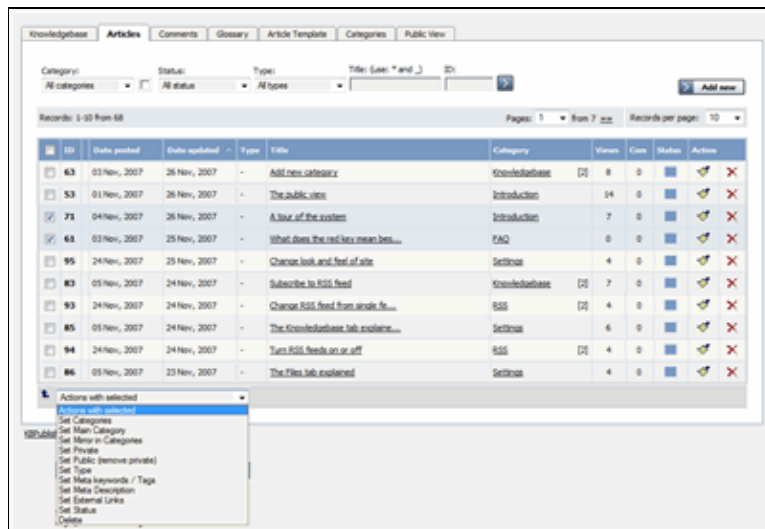
- Click on the **Feedback** menu
- Click on the **place question in KB** icon (the curved blue arrow) under **actions**
- This brings up a new article screen for you to start creating the new article.
The text in the email is listed in the article title
- Create the article as you normally would and save it.
- When you return to the **Feedback** screen, the **Placed in KB** box is checked.

Bulk Update Articles

KBPublisher allows you to bulk update articles to:

- Set categories
- Make the articles public or private
- Schedule article publication
- Set article type
- Add meta keywords/tags and descriptions
- Set external links
- Sort articles (available only when filter for category applied)
- Reset rating
- Set custom fields
- Set article status
- Delete articles.

You can do this direct from the **Articles** menu, **Articles** tab.



To update the article:

- Check one or more articles to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Import articles

You can import articles in bulk.

You might want to do this, say, if you are changing over to KBPublisher from another system.

The process is:

- Create a file of articles to import
- Upload a test sample to the system
- Import.

Create a file of articles to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of some or all of: **title**, **body**, **date_posted**, *id*, *author_id*, *updater_id*, *meta_keywords*, *meta_description*, *entry_type*, *external_link*, *date_updated*, *hits*, *sort_order*, *private* and an *active* flag.

- The first three fields (title, body and date_posted) *must* be included. You can include some, all or none of the others as required.
- They do not have to be in the same order as above, but each line in the import file must contain the same fields in the same order.
- The active flag defaults to '1', which is active, so the only time you would set this is if you don't want the users to be active.
- Place the data for each user onto a single line, and separate each field by a comma. Do not include spaces before or after the comma.
- Place quotes (") around text fields such as **body**, and be sure to check that your text does not have quotes within the text. If your body, or other text field, does contain quotes, choose a different delimiter and update the **fields optionally enclosed by** field to match.
- The [TestImportArticle.csv](#) file shows a sample of what your upload file should look like. This file includes the three default fields only.
- Field sizes and types are specific, as per the table below. Your data must fit within these parameters or the upload will fail.

Field	Type/size	M/O	Comments
title	text	M	Enclose text in quotes (")
body	mediumtext	M	Enclose text in quotes (")
date_posted	datetime	O	Format 0000-00-00 00:00:00
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
author_id	int(10)	O	If not supplied, the user currently logged in and importing the articles is set as the author.
updater_id	int(10)	O	If not supplied, the user currently logged in and importing the articles is set as the updater.
meta_keywords	text	O	

			Enclose text in quotes ("). Format should be the same as if you are adding the keywords in add new article.
meta_description	text	O	Enclose text in quotes (").
entry_type	tinyint(3)	O	Type.
external_link	text	O	Enclose text in quotes (").
date_updated	timestamp	O	Defaults to time imported to knowledgebase.
hits	int(10)	O	Defaults to 0.
active	tinyint(1)	O	Defaults to 1.

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported articles and try again. Create a test file and run that first.

- Copy the first, say, three lines of your text import to a separate file
- Either:
 - ◆ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ◆ Upload the file to the server

Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import/Export menu**
- Click on the **Import Articles** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and load it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Move the **CSV fields** around to specify which fields are in the file and what order they are in.
Do this by clicking on the name of the field you want to move and dragging and dropping it into the appropriate place.
For example, suppose you want the three mandatory fields included, plus the author ID. You need to move the *user_ID* field from the **Available table fields** box into the **Fields in CSV file box**.
 - ◆ Click on the *user_ID* field and hold the mouse down
 - ◆ While holding the mouse down, **drag** the *date_registered* field over to the **Fields in csv file** box
 - ◆ **Drop** the field into the box by releasing the mouse

Available table fields:	Fields in csv file (in order):
id - int(11) unsigned, PRIMARY	* title - text, FULLTEXT
author_id - int(11) unsigned, INDEX	* body - mediumtext, FULLTEXT
update_id - int(11) unsigned, INDEX	* date_posted - datetime, DEFAULT 0000-00-00 00:00:00
meta_keywords - text, FULLTEXT	
meta_description - text, FULLTEXT	
entry_type - tinyint(2) unsigned, INDEX	
external_link - text	
date_updated - timestamp, DEFAULT CURRENT_TIMESTAMP	
hits - int(11) unsigned	
sort_order - smallint(5) unsigned, DEFAULT 1	
private - tinyint(1)	
active - tinyint(1), DEFAULT 1	

Make sure that you place it in the order it appears in the file.

- Change **CSV options** if required.
- Click **Load**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

Fix any problems

All going well, you should now have three new articles in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these three articles, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the articles.

Import articles

Import the rest of the articles using the same process as for the test file, only this time using the real data file.

Note:

- Articles are imported with a category name of *Imported*. If this category does not exist it will be created as part of the upload process.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.
- Use the **bulk actions** option to change the categories, etc.

Private Articles

What the Private function does

The private option:

- Lets you force users to log on to read items
- Allows you to restrict who can read items
- Allows you to restrict who can edit or upload items.

It works for articles, files and news items, and can be applied at individual item level and at category level.

Using the Private function

Force users to log on

If you mark an item as **private read** and *do not assign roles*:

- Users must log on to read the item
- Any user who is logged on can read it
- In the Public area users will not see the item until they are logged on
- In the Admin area all users will see the item.

If you mark an item as both **private read** and **private write** and *do not assign any roles*:

- Users must log on to read the item
- Users who are not logged on cannot see the item.

Restrict read access

If you mark an item as **private read** and *do assign roles*:

- Users must log on to read item
- Only users who belong to the nominated role can read the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- All users in the Admin area can see the item.

Restrict write access

If you mark an item as **private write** and *do assign roles*:

- All users can read the item
- Only users who belong to the nominated role can create, edit or update the item
- For articles, users will not see Edit Article and Quick Edit options in the Public view if they do not belong to the correct role

Note that if you mark an item as **private write** and *do not assign roles*:

- All users can see and read the item
- All users logged in to the Admin area with appropriate privileges can edit the item.

Restrict both read and write access

If you mark an item as both **private read** and **private write** and *do assign roles*:

- Users must log on to read the item
- Only users who belong to the nominated role can see or read the item
- Only users who belong to the nominated role can create, edit or post the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- In the Admin area, users who do not belong to the nominated role cannot see the item

Note that private items work in conjunction with privileges. A user who does not have, say, author privileges, will still not be able to create articles even if they are assigned to a role that allows them access via private write.

Set up private read and write

To restrict whole categories:

- Edit the category
- Choose **Private Read** if you wish to restrict who can read the articles in this category or force users to log on to read the articles. Choose **Private Write** if you wish to restrict who can create or edit articles in the category. Choose both if you wish to restrict both reading and writing of articles
- This brings up another option, **Access for selected roles only**
By default, this is set to **None**, which means that users must log on to read articles in this category, but anyone can read them once they have logged on
- Select which roles users must belong to in order to read or write the article
- Click **OK**.

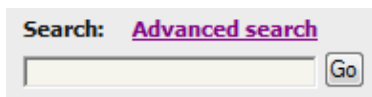
To restrict access to a single article:

- Edit the article
- Click on the **Advanced** tab
- Choose **Private Read** if you wish to restrict who can read the article or wish to force users to log on to read it. Choose **Private Write** if you wish to allow everyone to read the article but only writers in a specified role to edit it. Choose both if you wish to restrict both reading and writing.
- This brings up another option, **Access for selected roles only**
By default, this is set to **None**, which means that the article is private, but all users can read it once they have logged on
- Select which roles users must belong to in order to read/write the article
- Click **OK**.

Search

Search for an article

- The quick search box will search for the ID, title, content (articles and news items only) and meta information such as keywords and descriptions. It searches articles, files and news items.

A search interface showing a text input field with a 'Go' button to its right. Above the input field, the text 'Search: Advanced search' is displayed, with 'Advanced search' in a purple, underlined link style.

Search functionality is provided by MySQL full-text searching. This is a natural language search that allows you to type in a question or regular sentence that describes the information you are looking for, and then uses programmed logic to determine the keywords in the sentence.

- The **Advanced search** gives you extra options. It allows you to refine the search by limiting the search to articles, files or news items, and by specifying specific categories, article types and keywords. It also allows you to search on when an article, file or news item was created. It also allows you to search attached files or custom fields.
- In the **Admin area** the article and file filter options on the **Knowledgebase** also provide a type of search

An advanced search filter interface with four sections: 'Category:' with a dropdown menu showing 'All categories'; 'Status:' with a dropdown menu showing 'All status'; 'Filename: (use: " and _)' with a text input field; and 'ID:' with a text input field. A blue search button is located to the right of the ID field.

Search tips

- Use at least four characters. Search may not return correct results if you type in less. (Note. The minimum and maximum word length to be searched can be changed by the MySQL administrator)
- Use the asterisk (*) as a wildcard character to search for partial words. e.g. 'Excel*' will find articles containing 'Excellent' and 'Excel'. If you don't use the '*', then knowledgebase searches on full words only. e.g. a search on 'Excel' would only find articles containing the word 'excel', it would not find articles containing 'excellent'
- Use the underscore (_) to replace a single letter in the search. e.g. 'Optimi_e' will find both 'Optimize' and 'Optimise'. (This option is valid only for File searches and for Title filter searches on the Article screen in the Admin area.)
- If you include two or more search words, the search will look for articles that contain either word. e.g. 'Excellent Fred' will find articles that contain the word 'Excellent' and articles that contain the word 'Fred'
- To specify that the article must contain all words searched, use a plus sign (+) in front of each word, or in front of the most important word. e.g. '+Excellent +Fred' looks for articles that contain both words, while '+Excellent Fred' looks for articles that contain the word 'Excellent' but rank them slightly higher if they also contain the word 'Fred'. (Ranking controls where the result appears in the list. A ranking of 100% will be at the top of the list, and is the most likely match for what you are looking for.)
- To specify that the search should ignore articles containing certain words, use the minus sign (-) before the word to be ignored. e.g. 'Excellent -Fred' looks for articles with the word 'Excellent' in them, and then excludes any that also contain the word 'Fred'
- To find articles that contain the words exactly as you type them, put quotes (") around the words. e.g. "Bill and Fred's Excellent Adventure" will only find the article if it contains that exact wording.

Add new status

Articles, files, users, rating comments and feedback comments all have default statuses. For example, there are four default article statuses: *published*, *pending*, *draft* and *not published*.

You don't have to stay with these statuses, you can create your own:

- From the **Settings** menu choose the **Lists** tab
- Click on **Articles** (or Files, or Users, or Rating Comments or Feedback)
- Choose **Add New**

You must include:

- A **title**. This is the status name. e.g. *In review*.

You can also add:

- A description, an explanation of what this status is used for.
- A **color** that is displayed with the status on article summary and list screens.
- Whether or not this status is **published**. If you check this box, then users will be able to read articles of this status. If you do not check this box, then only authors, editors, moderators and administrators can read the article.
- The **order** of this item in the status list. This defaults to *1*, which places the new status at the top of the list.
- Whether or not the status is **active**. If the status is not active, then you will not be able to assign this status to article.

Lastly

- Click **OK** to save your changes.

Add new article type

You can create your own article types:

- From the **Settings** menu choose the **Lists** tab
- Click on **Article Type**
- Choose **Add New**

You must include:

- A **title**. This is the article type name. e.g. *FAQ*.

You can also add:

- A **description**, an explanation of what this article type is used for.
- An **article template**. This is default text and/or formatting that is created for all articles of this type. For example, you might create an article type of system errors. For each article of this type you require three sections: *error number*, *error message* and *anexplanation*, so you create a *System Error* type template with these three headings. When an author creates a new article based on *System Error*, these three headings are automatically included in the article, so all they have to do is fill in the details.
- The **order** this item is in the article type list. This defaults to *1*, which places the new type at the top of the list.
- Whether or not the type is **active**. If the type is not active, then you will not be able to choose this as a type.

Lastly

- Click **OK** to save your changes.

Subscribe to an article

Subscribing to an article means that you receive email notification of any changes to that article.

To subscribe to a single article

- Open the article to read it
- Click on **Subscribe** in the quick access panel on the right-hand side of the screen



The Subscribe option changes to Unsubscribe, and from now on until you unsubscribe you will receive notification whenever this article is edited.

To subscribe to all articles in a category

- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe for Article Categories**
- Click on **Add New**
- Select a category you wish to subscribe to and then click on the **plus (+)** button to the right of the category list. This adds the category to the **Selected Categories** list. Note, there is also an option to select all categories, if you wish
- Click OK to save your subscription.

You can see which articles you have subscribed to in the Subscriptions tab under My Account.

This functionality works in version 3.5 and above

Unsubscribe from an article

To unsubscribe direct from the article

- Click on the article to read it
- Click on Unsubscribe in the quick access panel on the right-hand side of the screen

To unsubscribe via the subscriptions list

You can unsubscribe from single files this way, and whole categories

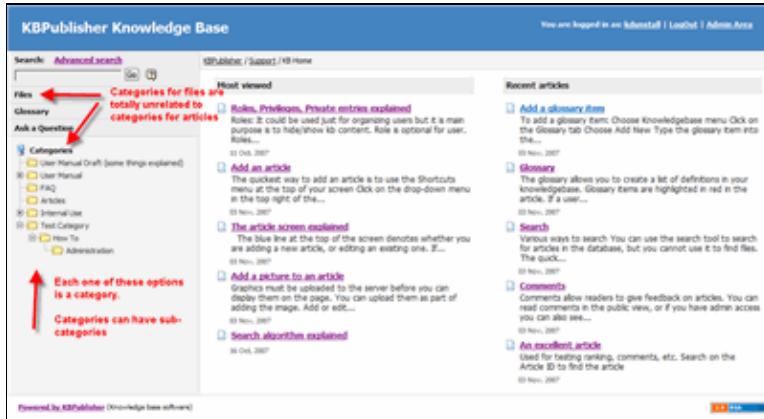
- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Articles** if it's for a single file, or from **Article Categories** if it's for the whole category
- Click **unsubscribe** for the article or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Categories

What are categories?

Categories control where information is displayed, how it is displayed and who can see it.



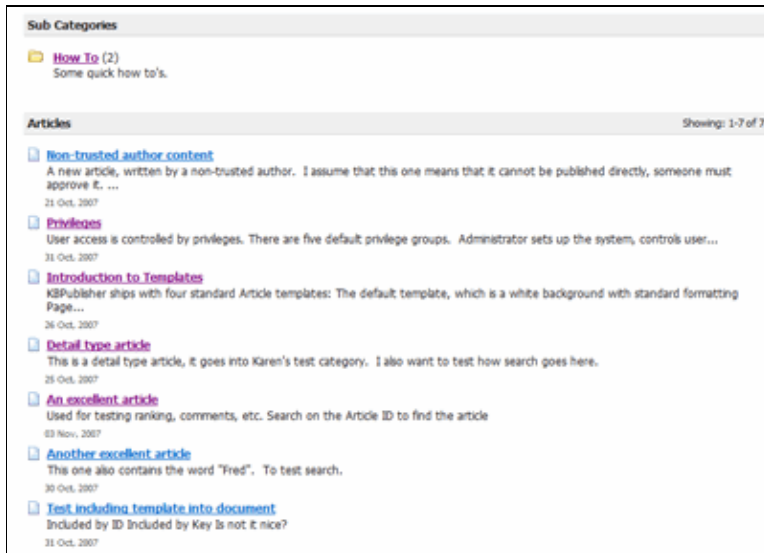
They control the menu display (sometimes known as the table of contents) on the left hand side of the screen.

Categories for articles and files are controlled separately.

Category types

Category type controls how articles in this category are displayed in the public view. There are four category types:

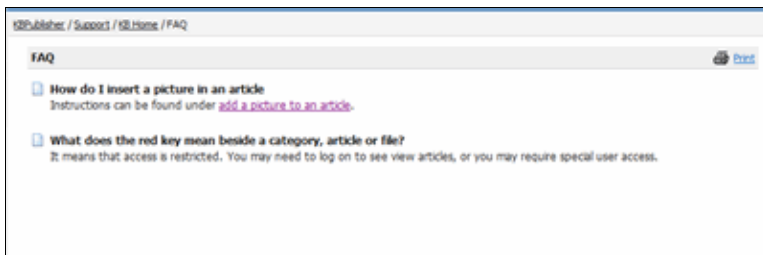
- The **Standard** (default) type displays a list of articles, along with one or two lines of text. If the category has sub-categories, these are displayed above the list.



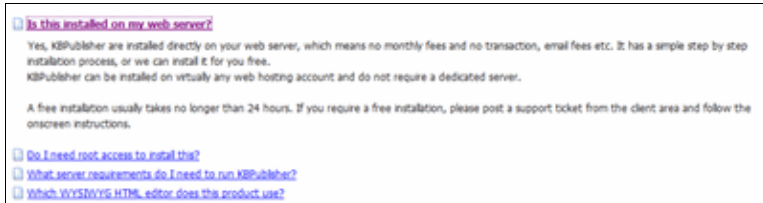
- The **book** type displays items as a table of contents.



- The **Quick FAQ** type displays all articles in the category on the same page.



- While the **Quick FAQ (interactive)** type displays all articles in the category on the same page as well, but with only the titles displayed initially. Click on the title to display the article, click on it again to hide it.



Add a Category

The quickest way to add a category is to use the **Shortcuts** menu at the top of your screen.

- Click on the drop-down menu in the top right of the screen and choose **Add new category**.

Or you can do it via the **Categories** tab in the Admin Area

- Click on the **Articles** menu
- Choose the **Categories** tab
- Click on **Add New**.

You can also add a category while you are in the middle of adding an article or a file

- Edit the article or file
- Click on the assign categories button (+)
- Click on **Add New Category**.

Once you are on the category screen you must complete the following sections:

- Add a **Title**. This is the name that will be displayed on the left menu or in any table of contents.
- Define where it fits in the category hierarchy by choosing a **Parent category** and an **Order**. If you don't change these you will add a new top-level category and it will be placed last.

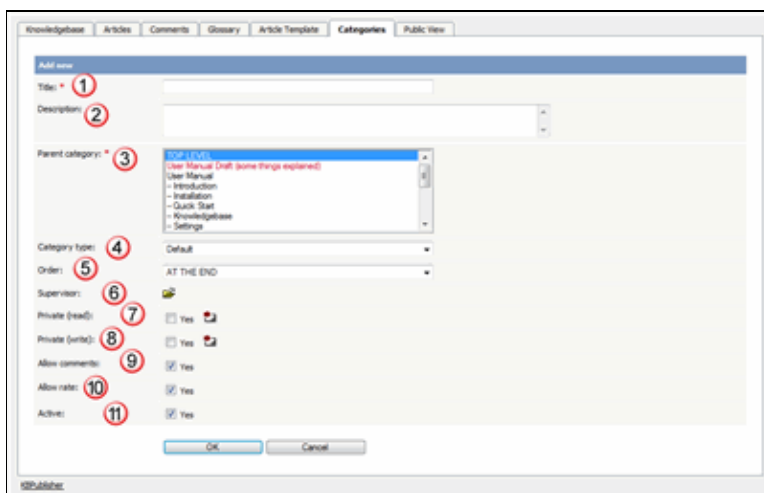
You may also:

- Change how articles are displayed by specifying a category **type**
- Control read and write access through **Private** and **Active**
- **Allow** users to **comment** on or **rate** articles in the category
- Assign a person to approve articles (**Supervisor**) for the category

You can find out more about each of these fields and how they work in [the Category screen explained](#).

The Category Input Screen Explained

To get to the Category screen, click on the **Articles** menu, then choose the **Categories** tab and then select or edit a category.



1. The category **Title** is the title that is displayed on the left menu in the public view. Title is compulsory.
2. The **Description** is an explanation of what this category is.
3. The **Parent category** denotes where this category will come in the menu. A **TOP LEVEL** category means that this is a top level menu and will be displayed in the list when a user first enters the public view. Categories that are red denote restricted privileges. They may be marked as 'private', or only users with assigned roles can access them.
4. **Category type** controls how articles in this category are displayed in the public view. See detailed explanation [here](#).
5. The **Order** defines where the category is placed in the list of categories. By default, it is added to the end of the list.
6. You can assign an owner to a category by assigning it a **supervisor**. This is the person who receives emails when pending articles have been created and need to be approved.
 - ◆ Click on the folder icon to bring up a list of users.
 - ◆ **Assign** a user.
7. You can force users to log on to read articles in this category by marking the category **Private Read/Write**. You can restrict authoring of articles in a category by marking the category **Private Write**.

Checking either option for Private brings up a list of roles. Select the role(s) that you wish to allow to read/write. Hold the key to select second and further roles. If the category is a sub-category, you can inherit the read privacy from the parent category by clicking on **copy from parent category**. This means that if you change the

privacy for the parent category the change will flow on to this sub-category.

8. When **Allow comments** is checked, users can add comments to articles in this category.
9. When **Allow rate** is checked, users can add a rating to an article in this category.
10. Content in an **Active** category is published at Public Area. Content that is not active will be hidden, and the only way you can see it through the Admin screens.

You can use this field to deactivate obsolete content, but you can also use this field to hide articles until you are ready to display them. It might be useful, for example, if your knowledgebase is about a system. You decide to add new functionality to the system but don't want the readers to anything about it until the release date. You can create articles about the new functionality in an inactive category, and then after the release, make the category active.

Article Templates

What are article templates?

Templates have two functions in KBPublisher--to standardize article design and to add boilerplate text.

To standardize design

Suppose you want each page in your knowledgebase to have three headings: 'Introduction', 'Steps' and 'Conclusion'. The 'Steps' section should be a simple bulleted list. You want all your authors to keep to the same format so you set up a template and ask them to create articles using that template

Or maybe you run a Help Desk. Rather than simply have users type their problem into a free-format article field, you can set up a form template and ask them to fill it in.

KBPublisher ships with four standard Article templates:

- The **default** template, which is a white background with standard formatting
- **Page Content** -- This is similar to the default template, but it includes headings and a numbered list
- **Info Box** -- a box with a yellow background, good for displaying information
- **Info Box 2** -- similar to Info Box, but the box has a grey background.

The default template is the base template. You do not need to specify it.

If you do specify a template, you can:

- Choose to replace existing content, whereby everything you have written in the article to date is overwritten, or
- Simply add the new template where your cursor is currently placed, or
- Include the template in the article. If you choose this option, a special tag (e.g. [tmpl:include|<template_key>]) is placed in the text to denote where the template is to be placed, and the content of the template is included at the rendering stage. This means that when you edit the article you do not see the contents that are being included; you just see the special tag.

Boilerplate text

If you find yourself continually typing the same content over and over again, you can use templates to simplify the work.

Maybe you need to add a disclaimer at the bottom of each page. The disclaimer is exactly the same on every page, and you don't want the bother of typing it in every time. A template saves time typing the disclaimer initially, but your legal people keep changing it. You don't want the hassle of changing every page. Not to worry. You can *include* a template. If the disclaimer changes, then all you have to do is change the template and the next time someone views the page they will see the correct disclaimer

Using templates in articles

The different ways you can add templates

A template is a piece of content (text and pictures and other media) that you can place into other articles. Common examples of where you might use a template are a disclaimer paragraph that you add to the bottom of each article, or a series of steps that are common to many of your instructions.

You can add, replace or include templates in articles.

- **Add** pastes the content of the template into the article. Once the content is added you edit it like any other article content.
- **Replace** works the same way except that instead of just placing the template content into the article at your cursor position, it replaces everything in the article.
- **Insert** is different in that it just puts a marker in the article, it doesn't put the contents in. The template content is pulled in when the reader opens the article to view it. When you edit the article you don't see the content from the template, all you see is a code like `[tmpl:include|27]` or and you can't edit the contents of the template in the article, you have to go back to the template to do it.
- The great thing about include is that if you can update the template as many times as you like and the changes always flow through to the article. This is not like add and replace, which place the contents of the template into the article, so once it's there it doesn't change if you update the template.

To add a template to an article

Your template must exist before you can use it in an article.

To add a template to an article:

- **Add** or **update** the article.
- If you are going to add or link to a template, place the cursor where you want to include the template.
- Choose the template from the **Template** drop-down menu.



- Click on the appropriate insert template icon
 - ◆ If you wish to **add** the contents of the template to the article, click on the icon with the **blue** arrow. This pastes the text of the template where the cursor is currently positioned. It does not affect any of the text above or below it.
 - ◆ If you wish to **replace** the contents of the article, click on the icon with the **red** arrow. This deletes any text currently in the article and replaces it with the text in the template.
 - ◆ If you wish to **include** the contents of the template, click on the icon with the **green** arrow. This puts a placeholder into the article and when a user opens the article to read it, the knowledgebase pulls in the text from the placeholder

template.

- ◆ If you have defined a key for your template, you can also include the template by typing in the special template include command and the template key into the editor window. i.e. By typing [tmpl:include|<template_key>] where <template_key> is the template key
- ◆ Or you can use the article ID in the template include command, i.e. [tmpl:include|<ID>] where <ID> is the article ID.

Alternatively, you can use the **Template** icon in the editing toolbar, but this only allows you to add or replace the template; it does not allow you to link the contents.

If you choose this option:

- Add or update the article
- Place your cursor where you want to insert the template
- Click on the **templates** icon (check out [the edit toolbar explained](#) to see where the templates icon is on the toolbar)
- This opens a pop-up box. If you intend to replace the current contents, check **Replace actual contents**
- Click on the name of the template
- This returns you to the editor with the template inserted.

Tip:

- You can also use the [article type](#) as a form of template.

Add an Article Template

To add a new article template

- Click on the **Articles** menu
- Choose the **Article Template** tab
- Click on **Add New**.

Once you are on the article screen you must complete the following sections:

- Add a **Title**. This is the name of the template.
- Set up your template in the **Template** editing box.

The following items are optional:

- You can include a template **key** to use to easily identify the template when including it in articles
- You can add a **description** to explain what the template is used for
- You can specify whether the template can be used by marking it **active**. If you don't mark the template as active, then authors cannot use it in their articles.

Once your article is complete

- Click **OK** to save it.

Article types as templates

Another form of template is the article type.

Each article can be assigned a 'type'. Your knowledgebase might contain, for example, the following types:

- Procedures which contain a short summary, plus some steps
- Screen images, with an explanation of each field on the screen
- Common error messages showing the error number, the message, and an explanation of what it means.

You can use article types to set up a base template for each type of article. For example, the Procedures type may contain one heading called *Summary*, and another called *Steps* with a numbered list below it, while the Error Messages type contains three headings: *Error No*, *Error Message* and *Explanation*. Set up your article types templates with these headings.

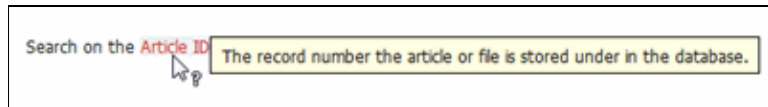
When you create a new article, choose the appropriate type from the **Type** drop-down list, and the headings are automatically included in the article. All you need to do then is fill in the blanks.

Glossary

Glossary explained

The **glossary** allows you to create a list of definitions in your knowledgebase.

Glossary items are highlighted in red in the article. If you hover your mouse over the glossary item you see a question mark. If you click on the word, the definition is displayed in a yellow box.



To hide the definition again, move your cursor away from the word.

Add a glossary item

The quickest way to add a glossary item is to use the **Shortcuts** menu at the top of your screen

- Click on the drop-down menu in the top right of the screen and choose **Add new glossary item**.

Or you can do it via the **Glossary** tab in the **Articles**.

- Choose **Articles** menu
- Click on the **Glossary** tab
- Choose **Add New**

Once you are on the screen you must complete the:

- **Word/phrase** field. This is the word or phrase that is highlighted in red the articles.
- **Definition**. This is the text displayed in the yellow box when the user clicks on the word that is highlighted.

You can also choose whether to:

- **Highlight once**. If you check this box the glossary item will only be highlighted once on each article page. If you don't check this box, every time the word or phrase is found, it will be highlighted.

Import glossary

If you already have a list of terms and definitions that you would like to use in your knowledgebase, you can upload these terms in bulk.

The process is:

- Create a file of glossary items to import
- Upload a test sample to the system
- Import.

Create a file of glossary items to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of a **phrase**, followed by a **definition**.

- Both fields *must* be included, and they must be in the order of glossary item name (phrase) first, and then the text that explains it
- Place the data for each glossary item onto a single line, and separate each field by a comma. Include a space after the comma. If you choose to use something else other than a comma, update the **field terminated by** field under CSV options to match.

Field	Type/size	M/O	Comments
phrase	varchar(100)	M	The maximum size of a phrase is 100 characters
definition	text	M	
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
Highlight once	tinyint(1)	O	Defaults to 0.

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported glossary items and try again. Create a test file and run that first.

- Copy, say, the first three lines of your text import to a separate file
- Either:
 - ◆ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ◆ Upload the file to the server

Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import menu**
- Click on the **Import Glossary** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and load it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Change **CSV options** if required.
- Click **Load**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

Fix any problems

All going well, you should now have three new glossary items in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the glossary.

Import articles

Import the rest of the glossary using the same process as for the test file, only this time using the real data file.

Note:

- If the glossary item already exists, a new item will still be uploaded. We recommend you do not duplicate.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.

This functionality works in version 4.0 only

Comments

Article comments

Comments allow readers to give feedback on articles.

You can read comments in the public view, or if you have admin access you can also see them from the comments tab in the knowledgebase.

To add a comment:

- Open the article to read it
- Click on **Add comment**.
- This brings up the screen to add a comment. Type in your comment. Type it in as plain text. Do not include HTML.
- If you wish to be notified when someone else adds a comment to this article, check **Subscribe**
- Unless the system administrator has changed the settings, you will then need to type in a confirmation code. Type the code exactly as you see it. Match upper and lower case.
- Click **OK**.

Your comment is displayed beneath the article.

By default, it is displayed immediately, but this can be changed in the settings to require approval first.

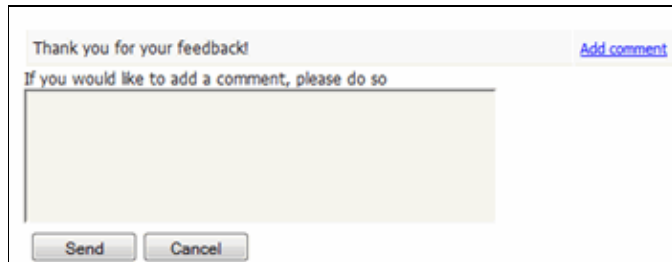
Rating Comments

Users can rate articles to say whether they were helpful or not helpful.

Depending on how you set your knowledgebase up, they can either rate an article as:

- Helpful/Not helpful, or
- Use a star rating system.

When a user rates an article they can also add a comment saying why they rated the article the way they did.



These comments are emailed to the supervisor for that category, or if no supervisor is assigned, to the system administrator.

You can see these rating comments in the Admin area

- Choose the **Feedback** menu
- Select the **Rating Comments** tab

This functionality works in version 3.5 and above

Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0.

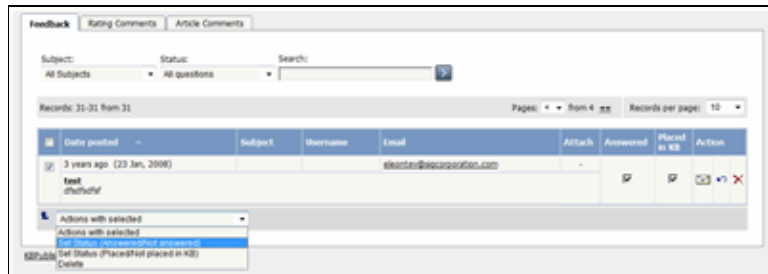
For a complete list of changed/new functionality, please see [version 4.0 release notes](#)

Bulk update comments, rating comments and feedback

KBPublisher allows you to bulk update feedback, comments and rating comments to:

- Set a status
- Delete

You can do this direct from the **Feedback** menu, and choose the appropriate tab.



To set the status of a comment or a rating comment:

- Click on the appropriate tab
- Check one or more comment to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.
For example if your privilege does not allow you to delete comments then there is no 'Delete' action in the list of options.

Files

The Files area of the knowledgebase

What are files and how do they work?

Files are documents you can add to your knowledgebase. The type of files you can add is controlled by the settings of your knowledgebase, but in general you can add graphics, text documents, Microsoft Office documents (Word, Excel, PowerPoint) or PDFs.

The file area is separate to the article knowledgebase, although you can attach the files from the File area into articles. Note though, that [inserting graphics into articles](#) is not the same as adding a file from the Files area.

Why would you want to have a separate files area? Common examples might be:

- It could be a download area of your knowledgebase.
- You have a whole lot of process documents or user manuals that you wish to upload.

The maximum size of a file you can upload depends on PHP settings, default is 2MB.

Add a File

The quickest way to add a file is to use the **Shortcuts** menu at the top of your screen

- Click on the drop-down menu in the top right of the screen and choose **Add new file**.

Or you can do it via the **Files** menu.

- Click on the **Files** menu
- Choose the **Files** tab
- Click on **Add New**.

Once you are on the file screen you must:

- **Browse** to find the file
- Assign the category you want the file to be stored in

The following items are optional:

- To help users identify what is in the file, include a **Title** and a **Description**.
- To order the file in the list, use **Order**. By default, the file will be placed at the end.
- To force users to log on to download a file, mark it as **Private**
- Use the **Status** field to make the file available to download.

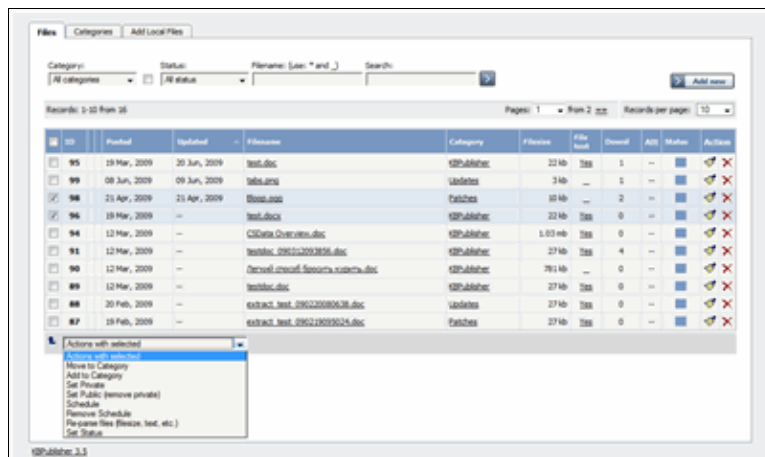
The maximum size of a file you can upload depends on PHP settings, default is 2MB. See [here](#) for Files settings (Allowed extension, Max file size, etc).

Bulk update files

KBPublisher allows you to bulk update files to:

- Set categories
- Make the files public or private
- Schedule file publication
- Sort files (available only when filter for category applied)
- Re-parse files to extract text from the file (to make them searchable) and update the file size information
- Set custom fields
- Set file status.

You can do this direct from the **Files** menu, **Files** tab.



To update the file:

- Check one or more files to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

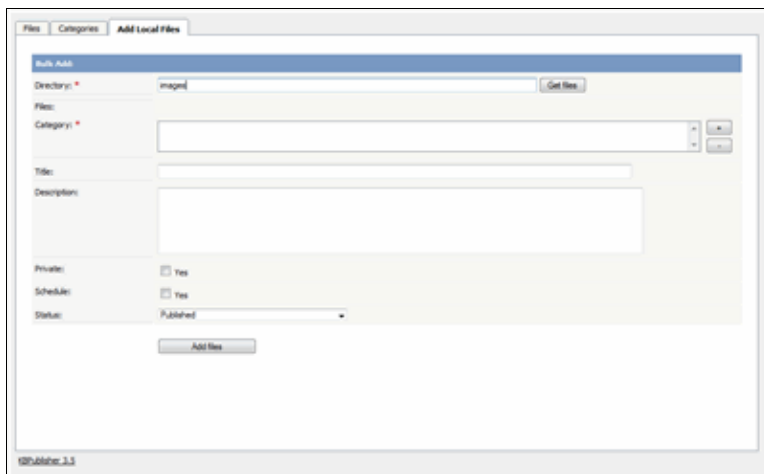
- Bulk actions available depend on your user access. For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Add a Local File

When you add files using [Add a File](#), you upload the file from your local drive (e.g. your c: drive) or a server drive. But sometimes the file you want to upload is already on your server, and if you upload the file again you'll end up with two copies of it. This often happens, for example, when your knowledgebase is integrated into your company web site and you want to include documents from your website: forms, disclaimer documents, product disclosure statements, catalogues, support manuals and so on.

You don't have to upload it twice. Instead, you add it as a local file.

- Click on the **Files** menu
- Choose the **Add Local Files** tab
- Type the name of the directory where the files are stored in the **Directory** field



- Click **Get Files** to find a list of valid files in the directory.

This brings up a list of files found in that directory. Initially, all are selected. Uncheck the box next to Filename to deselect them all, or uncheck individual files to deselect them one at a time.



- Select the files that you wish to upload
- Add a file **category**. You can add multiple categories.

If you wish you can also:

- Add a **title** and a **description**. If you upload more than one file, each file will have the same title and description
- Make the file **private**
- Change the **status**, or **schedule** a status change at a specified date and time

Once you have completed filling in the details:

- Click **Add Files** to upload the files selected.

The files are displayed in the specified category(ies) along with other files,

Tips:

- The files that are found are controlled by the **Allowed/Denied extensions** setting on **Admin** tab under **Settings**. If you have said there are no restrictions, then all files in the directory are found. If you have said only image and text files are loadable, then only image and text files will be found. See the [Files tab explained](#) for more information about this.
- Files listed are only those in the directory specified. It does not find files in directories below this.
- The PHP **open_basedir** setting determines where KBPublisher searches for the files. If you find that Get Files only searches the directories under the knowledgebase itself, then check your settings to see if PHP restricts it to this.

Automatically Add Local Files

The Directory Rules screen allows you to set up the knowledgebase so that KBPublisher automatically checks the specified directory on the server every day and adds links to any new files to KBPublisher.

Standard allowed and denied extension rules apply, based on your denied and allowed extensions set in the [Files Settings](#) tab.

Note that it doesn't actually move files, it just adds links, so once they have been added to KBPublisher if you move them from the specified folder you will end up with broken links.

Rule options

1. The **Directory** is the folder on the server where the files are to be uploaded from. Directory name should be the [full server path](#).
2. To check that the directory exists, click **Read Directory**. If your directory is set up properly, this will bring up a list of files in the directory ready to be uploaded.
3. If you wish to upload anything from child directories as well, check **Parse child directories**
4. A **description** is not compulsory, but it's good practice to add one so that later on, when viewing, you know why files in this directory are being picked up.
5. Check **Yes** for **Active** to start automatically uploading the files from the next scheduled time. If you want to stop the automatic upload temporarily, uncheck this box and the upload will stop until you turn it back on.

File options

6. When the files are uploaded they will be placed in the **category** you assign here.
7. To choose an **author** against whose name the files will be uploaded click on the folder icon and **Assign** from the pop-up list of registered users that comes up.
8. As with any file, you can force users to log on and control who can update the uploaded files by setting **private read and write**
9. By default, files are set to a default **status** of **published**, but you can change this to whatever status wish.
10. You can **schedule** the uploaded files to change status on a specified date. [Schedule an item](#) explains how scheduling functionality works
11. **OK** saves your automatic upload.

12. **Back** cancels it
13. **Save and parse** saves the rule and executes it now.

This functionality works in version 4.0 only

Add New File Category

The quickest way to add a category is to use the **Shortcuts** menu at the top of your screen.

- Click on the drop-down menu in the top right of the screen and choose **Add new file category**.

Or you can do it via the **Categories** tab under **Files**.

- Click on the **Files** menu
- Choose the **Categories** tab
- Click on **Add New**.

Once you are on the category screen you must complete the following sections:

- Add a **Title**. This is the name that will be displayed on the left menu or in any table of contents.
- Define where it fits in the category hierarchy by choosing a **Parent category** and an **Order**. If you don't change these you will add a new top-level category and it will be placed last.

You may also:

- Control access through **Private** and **Active**
- By checking **Allow attach files**, files from this category will be allowed to be attached
- Designate an owner (**Supervisor**) for the category

You can find out more about each of these fields and how they work in [the Category screen explained](#).

Private Files

What the Private function does

The private option:

- Lets you force users to log on to read items
- Allows you to restrict who can read items
- Allows you to restrict who can edit or upload items.

It works for articles, files and news items, and can be applied at individual item level and at category level.

Using the Private function

Force users to log on

If you mark an item as **private read** and *do not assign roles*:

- Users must log on to read the item
- Any user who is logged on can read it
- In the Public area users will not see the item until they are logged on
- In the Admin area all users will see the item.

If you mark an item as both **private read** and **private write** and *do not assign any roles*:

- Users must log on to read the item
- Users who are not logged on cannot see the item.

Restrict read access

If you mark an item as **private read** and *do assign roles*:

- Users must log on to read item
- Only users who belong to the nominated role can read the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- All users in the Admin area can see the item.

Restrict write access

If you mark an item as **private write** and *do assign roles*:

- All users can read the item
- Only users who belong to the nominated role can create, edit or update the item
- For articles, users will not see Edit Article and Quick Edit options in the Public view if they do not belong to the correct role

Note that if you mark an item as **private write** and *do not assign roles*:

- All users can see and read the item
- All users logged in to the Admin area with appropriate privileges can edit the item.

Restrict both read and write access

If you mark an item as both **private read** and **private write** and *do assign roles*:

- Users must log on to read the item
- Only users who belong to the nominated role can see or read the item
- Only users who belong to the nominated role can create, edit or post the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- In the Admin area, users who do not belong to the nominated role cannot see the item

Note that private items work in conjunction with privileges. A user who does not have, say, author privileges, will still not be able to create articles even if they are assigned to a role that allows them access via private write.

Set up private read and write

To restrict whole categories:

- Edit the file category
- Choose **Private Read** if you wish to force users to log on and/or to restrict who can see files in this category. Choose **Private Write** if you wish to allow everyone to see and open files in the category but only people who have in the specified roles to manage them (e.g. upload, delete). Choose both Private Read and Private Write if you wish to restrict who can read the files and also who can manage them.
- This brings up another option, **Access for selected roles only**. By default, this is set to **None**, which means that users must log on to see and open files in this category, but anyone can see them once they have logged on
- Select which roles users must belong to in order to read the files
- Click **OK**.

To restrict access to a single file:

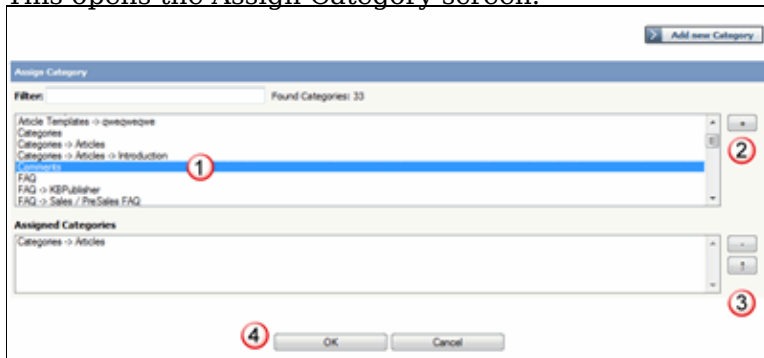
- Edit the file
- Choose **Private Read** if you wish to force users to log on to read the file or you wish to restrict who can see or open it. Choose **Private Write** if you wish to allow everyone to see and open the file but only people who have the specified roles to manage (e.g. delete) it. Choose both Private Read and Private Write if you wish to restrict who can see or open the file and who can manage it.
- This brings up another option, **Access for selected roles only**. By default, this is set to **None**, which means that the file is private, but all users can read it once they have logged on
- Select which roles users must belong to in order to read/manage the file

Assign category to a file

Assigning a category to a file is a two-part process. First you assign the category, and then you define the order the item is displayed in that category

To assign the category

- Create or edit the article
- Click on the plus (+) button on the right-hand side of the category field.
This opens the Assign Category screen.



- Select the Category from the list of categories (1)
- Click on the **plus (+)** button at the right-hand side to add this category to the list of assigned categories (2)
- If you wish this category to be the default category, then select the category in the Assigned list and then click on the **Set Default** button (3) to make this the default category
- Click **OK** to save your changes and exit from the Assign Category screen

You can add multiple categories.

On the Assign Category screen you can also:

- **Filter** the list to reduce the number of categories displayed
- Add a new category by clicking the **Add New Category** button
- Remove existing categories by clicking on them in the **Assigned Categories** box, and then clicking on the **minus (-)** button.

Tips:

To quickly assign a category you can:

- Double-click on the category, or
- Click on the category, then press <Shift> and <Enter>

To quickly unassign a category you can:

- Double-click on the assigned category.

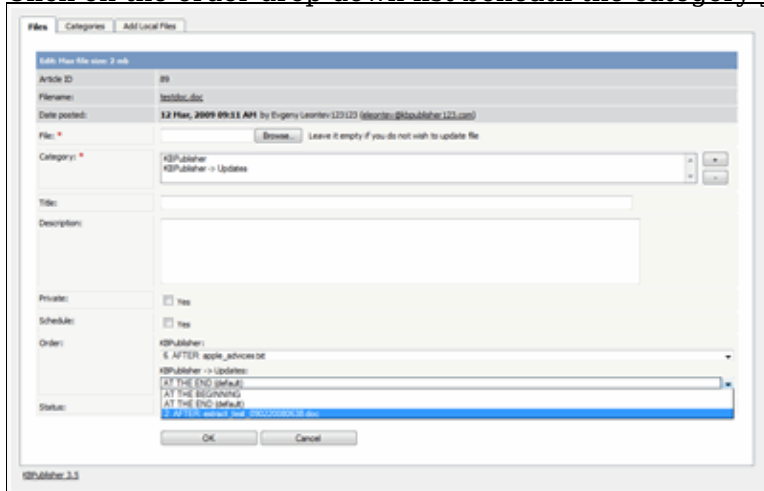
To display only top categories you can:

- Type *top:* in **filter** field

To order the category

When you exit from assigning the category the new categories are listed at the bottom of the screen.

- This will now contain a list of each category you have added, and an order. By default, articles are placed at the end of the category.
- Click on the order drop-down list beneath the category you wish to re-order



- Select a new position from the list
- Click **OK** to save the changes,

Delete a file

To delete a file:

- Choose **Files** menu
- Click on the **Files** tab
- Click on the red '**X**', which is under Actions, for the file you wish to delete
- Click **OK** to confirm that you really do want to delete the file
- You will be presented with a warning message asking if you wish to delete the file from disk
 - ◆ Choose **No, just delete record from DB** if you wish to delete it from the knowledgebase but leave the file on the server
 - ◆ Choose **Yes, delete from disk** to remove the file altogether.

Note:

- If a file is attached to an article it cannot be deleted.

Enable searching in files

Text-based file searching/indexing (txt, html, etc.) is enabled by default. If you want to include searching PDF or Word documents then you need to do the following.

Searching in PDFs

To enable search in PDFs you need to:

- Install a program called **xpdf**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your xpdf directory. (Check your *open_basedir* PHP setting in *php.ini*)
- Ensure that PHP can run the system function. (Check your *disable_functions*, *safe_mode_exec_dir* PHP settings in *php.ini*)

Install xpdf

- xpdf is available from www.foolabs.com/xpdf/download.html
- Download and install it.

Update the setting to point to xpdf

Once you have installed xpdf, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Admin -> XPDF installation path**
- Make sure that this points to the directory where you installed xpdf. For example: `/usr/local/bin/` or `c:/wwwroot/xpdf/`
- Set this to 'off' to de-activate this option.
- When you click "Save", test pdf file will be parsed/indexed and error occurs if it failed.

Test xpdf from command line

Test to see if xpdf is working by running the following command from the command line:

```
$ /path_to_xpdf/pdftotext -raw file_read.pdf file_write.txt;  
Test xpdf from command line using PHP and included test file:
```

```
$ cd /path/to/kbp_directory  
$ php -r "system('/path_to_xpdf/pdftotext -raw admin/extra/file_extractors/extract_test.pdf  
file_write.txt');"
```

Searching in Word 2007/2010, Excel 2007/2010 or Open Office document files

To enable search in .docx, .xlsx and .odt documents you need to:

- Install a **PHP Zip** extension if you do not have one
- You can see if you have it installed in *Home -> Setup Tests* tab in your KBPublisher installation

Searching in Word 2003 and below files

To enable search in Word documents you need to:

- Install either **catdoc** or **Antiword**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your catdoc directory. Check your *open_basedir* PHP setting in *php.ini*.
- Ensure that PHP can run the *exec* function. Check your *disable_functions*, *safe_mode_exec_dir* PHP settings in *php.ini*.

Install catdoc

- catdoc is available from <http://www.wagner.pp.ru/~vitus/software/catdoc/>
- Download and install it.

Install Antiword

- **Antiword** is available from <http://www.winfield.demon.nl/>
- Download and install it.

Update the setting to point to catdoc

Once you have installed catdoc, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Admin -> catdoc installation path**
- Make sure that this points to the directory where you installed catdoc. For example: */usr/local/bin/* or *c:/wwwroot/catdoc/*
- When you click "Save", test pdf file will be parsed/indexed and error occurs if it failed.

Test catdoc from command line

Test to see if catdoc is working by running the following command from the command line:

```
$ /path_to_catdoc/catdoc -w file_read.doc;
```

Test catdoc from command line using PHP and included test file:

```
$ cd /path/to/kbp_directory
```

```
$ php -r "system('/path_to_catdoc/catdoc -w admin/extra/file_extractors/extract_test.doc');"
```

Turning PDF or Word search off

If you don't want to allow searching on PDF or Word documents, change the setting in *XPDF installation path* or *catdoc installation path* to **OFF**.

Schedule an Item

Scheduling an article, news or file allows you to set a date that the item is made visible to users in your knowledgebase and/or a date that it stops being visible.

For example, suppose your company is closed for the Christmas/new year holiday periodâ say it is closed from 12 noon on 24 December and re-opens at 9 am on the 2nd of January.

- You add a news item to say that you will be closed over this period. When you create it (on 18 December, say), you set its status to "Not Published"
- You schedule this news item to change status to "Published" at 12 noon on 24 December, and to change status again to "Not Published" at 9am on 2 January.

Or suppose you have a new software release being implemented. You can create new articles for the new functionality in the software before the release. Give these articles a status of 'Not published', and then schedule them to be published on the assigned release date.

To schedule the item:

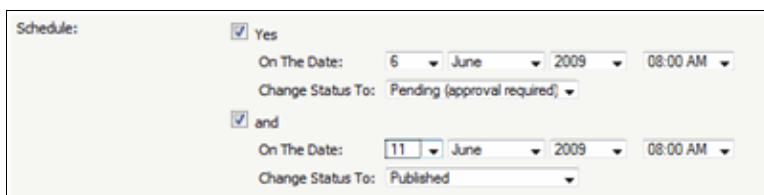
- Create or edit the article, file or news
- If you are scheduling an article, click on the **Advanced** tab (you don't need to do this for files or news items)
- Check **Yes** to the **Schedule** option
- This expands the Schedule options



- Add a date and time to the **On the Date** fields to set the date and time that the item is to change status
- Use the **Change Status To** for determining whether the item is to be published or not published. (Articles have two further statuses, pending and draft.)
- Add a **Note** to explain why this item was scheduled on this date. Use it as a reminder or as a record of what happened.

If you wish, you can set a second date and time to change to another status:

- Check the **And** checkbox
- This brings up a second set of date and status options



- Add a date and time to the second **On the Date** fields to set the date and time that the item is to change status
- Use the second **Change Status To** for assigning the new status
- Add a second note if required.

Items that are scheduled have a small clock next to the article/file/news ID on the list screens.



Tip:

- You can also use bulk actions to schedule or remove schedules.

This functionality works in version 3.5 and above

Remove scheduling

To remove scheduling from an article, file or news:

- Edit the item
- Uncheck the **Schedule** checkbox

You can also use the bulk actions option to remove scheduling from multiple articles or files:

- Select each item to be un-scheduled
- Choose **remove schedule** from the **Actions with selected** options at the bottom of the screen.

This functionality works in version 3.5 and above

Subscribe to a file

Subscribing to a file means that you receive email notification of any changes to that file.

To subscribe to a single file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to subscribe to
- Click on **Subscribe** in the file details box



The Subscribe option changes to Unsubscribe, and from now until you unsubscribe you will receive notification whenever this file is changed.

To subscribe to all files in a category

- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe for File Categories**
- Click on **Add New**
- Select a category you wish to subscribe to and then click on the **plus (+)** button to the right of the category list. This adds the category to the **Selected Categories** list. Note, there is also an option to select all categories, if you wish
- Click OK to save your subscription.

You can see which files you have subscribed to in the Subscriptions tab under My Account.

This functionality works in version 3.5 and above

Unsubscribe from a file

To unsubscribe direct from the file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to unsubscribe from
- Click on **Unsubscribe** in the file details box

To unsubscribe via subscriptions

You can unsubscribe from single files here, or from whole categories

- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Files** if it's for a single file, or from **File Categories** if it's for the whole category
- Click **unsubscribe** for the file or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Feedback

How feedback works on KBPublisher.

User feedback

Users can contact the knowledgebase by sending a feedback request. They can use the feedback form to ask questions, provide general feedback or even to suggest updates.

Different subjects can be emailed to different moderators.

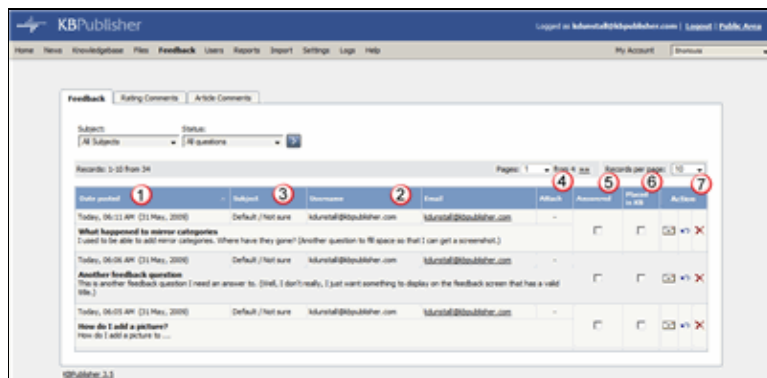
The feedback request also provides a 'Quick Response' answer. As the user types their question, KBPublisher searches for articles appropriate to the words typed and brings back the five articles most likely to match the query. If the answer is in one of the listed articles, the user doesn't have to send the query at all. They can simply click on the article instead.

The request is sent to an email address defined in the settings.

The person who receives the email can:

- Reply by email, or
- Publish the feedback to the knowledgebase as an article, or
- Both reply and publish.

A user with administrator, moderator or editor access can view the feedback by clicking on the **Feedback** menu.



This brings up a list of the feedback that users have sent.

1. **Posted date** is the date the user sent the feedback.
2. **Username** and **Email** are those of the user who has sent the feedback.
3. **Subject** is the subject area the user chose from the list of subjects when they sent the mail. The person reading the mail may also change the subject.
4. **Attach** denotes whether or not the user has attached any files with their feedback.
5. When the **Answered** box is checked, it means that you (or one of the other knowledgebase moderators) replied to the user by email.
6. When **the Placed in KB** box is checked it means that you (or one of the other knowledgebase moderators) posted an answer to the knowledgebase.
7. There are three possible **Actions**:

- ◆ Click on the email **answer** icon to reply to the user by email

- ◆ Click on the **post question to KB** icon to post an answer to the knowledgebase.
The question the user asked becomes the title of the article
- ◆ Click on the red **delete** icon to delete the question.

It is quite common to both answer the user by email and then post to the knowledgebase. For example a user might ask a question that you think deserves to be a knowledgebase article, so you write the article and then email the user back to say that the answer is now on the knowledgebase.

The templates for the initial email and the reply are controlled in the settings.

Quick Response

By "connecting" your contact form with your knowledge base, your visitors can get instant answers to questions that they would normally send you via email.

If a user clicks on **Ask a question**, when they start typing their query into the **Question/Comments** field, KBPublisher checks what they are typing and searches for articles that may answer the question.

It presents the five best matches at the bottom of the screen under a heading called 'Do these answers help?'

The five articles returned change as the user types more words.

The screenshot shows the KBPublisher Knowledge Base interface. At the top, there is a navigation bar with 'KBPublisher / Support / KB Home / Contact Us' and a user login status 'You are logged in as: AdminStaff | LogOut | Admin Area'. Below the navigation bar is a 'Contact Us' form. The form has a 'Subject' dropdown set to 'Default', a 'Title' field with 'default user groups', and a 'Question / Comment' field containing 'How do I create default user groups'. A red arrow points to the 'Question / Comment' field with the text 'Start typing your question here'. Below the 'Question / Comment' field is an 'Attachment' field with a 'Browse...' button and a confirmation code field with a CAPTCHA image showing 'n99tZZ' and the text 'Write the characters in the image above exactly as you see it'. Below the form is a green box titled 'Do These Answers Help?' with the text 'We have found some answers in our knowledge base that might help to answer your question:'. Below this box is a list of five search results, each with a title and a brief description. A red arrow points from the 'Do These Answers Help?' box to the search results. The search results are: 1. 'User privileges | (27/05/2015)', 2. 'Create new user privilege | (27/05/2015)', 3. 'Privileges | User Manual Draft (some things explained)', 4. 'Create new user role | (27/05/2015)', and 5. 'Summary | (Getting started)'. At the bottom of the search results box are 'OK' and 'Cancel' buttons. At the bottom of the page, there is a footer with 'Powered by KBPublisher (Knowledge base software)' and a small logo.

Turning off quick response

This option can be turned off in Settings if you prefer a basic feedback form without this feature.

- Go to **Admin Area**
- Click on the **Settings** menu
- On the **Common** tab, under **Feedback**, uncheck **Enable 'quick response'**.

Reply to feedback from a user

There are two ways to reply to emailed feedback from a user.

The first is to click on the link supplied in the email:

- Click on the link after **Read and respond to this message at** in the email
- This brings up a mail template for you to reply to.

Or you can do it from the feedback option:

- Click on the **Feedback** menu
- Click on **answer** icon (email) in the Action list for the feedback you are answering
- This brings up a mail template for you to reply to

Once the email template is open:

- Type your answer in the **Answer** section
- Click **Send**
- You return to the Feedback screen. The answered box is checked.

Add an article as a result of user feedback

Sometimes, feedback from a user generates an idea for another article. You can create this article direct from the feedback page.

- Click on the **Feedback** menu
- Click on the **place question in KB** icon (the curved blue arrow) under **actions**
- This brings up a new article screen for you to start creating the new article.
The text in the email is listed in the article title
- Create the article as you normally would and save it.
- When you return to the **Feedback** screen, the **Placed in KB** box is checked.

Add New Feedback Subject

You can create your own feedback subjects:

- From the **Settings** menu choose the **Lists** tab
- Click on **Feedback Subject**
- Choose **Add New**

You must include:

- A **title**. This is the subject the user picks from the drop-down list of subjects when they are sending feedback.

You can also add:

- A **description**, which is an explanation of what this subject is used for.
- A **supervisor**. This allows you to determine which user will receive feedback for this subject. If you do not assign a supervisor, then the email assigned to receive Support email will get the feedback. To assign the supervisor click on the **Add New** icon, find the person you want to receive the emails, and click **Assign**. You can add more than one supervisor. Each person on the list will receive the emails.
- Choose a **color** that will be associated with this feedback subject.
- The **order** this item is in the list of feedback subjects. This defaults to *1*, which places the new type at the top of the list.
- Whether or not the feedback subject is **active**. If the subject is not active, then the user will not be able to choose this as a subject.

Lastly

- Click **OK** to save your changes.

Article comments

Comments allow readers to give feedback on articles.

You can read comments in the public view, or if you have admin access you can also see them from the comments tab in the knowledgebase.

To add a comment:

- Open the article to read it
- Click on **Add comment**.
- This brings up the screen to add a comment. Type in your comment. Type it in as plain text. Do not include HTML.
- If you wish to be notified when someone else adds a comment to this article, check **Subscribe**
- Unless the system administrator has changed the settings, you will then need to type in a confirmation code. Type the code exactly as you see it. Match upper and lower case.
- Click **OK**.

Your comment is displayed beneath the article.

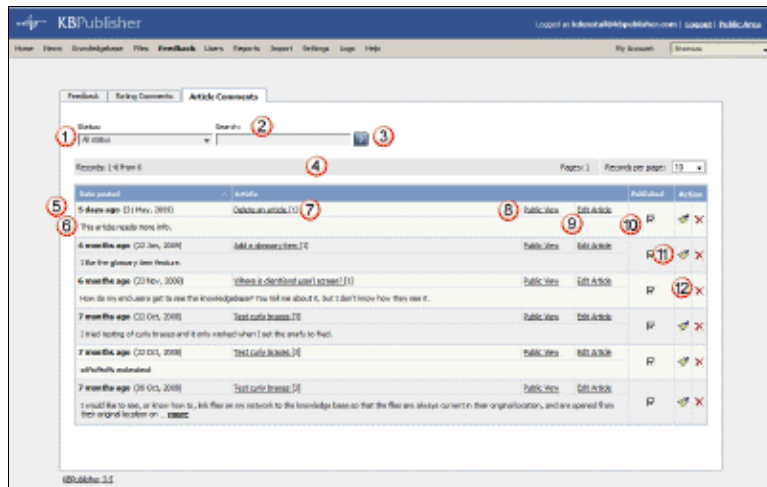
By default, it is displayed immediately, but this can be changed in the settings to require approval first.

The article comments screen explained

The Article Comments screen displays a list of the comments users have added to articles.

To get to this screen:

- Select the **Feedback** menu
- Click on the the **Article Comments** tab.



1. The **Status** drop-down list allows you to filter comments by whether they have been published or are unpublished
2. Use the **Search** field to search for specific text in the comment.
3. Once you have changed the status or typed in a search command, use the Go button to get the results back.
4. The records line contains information about how many comments are displayed here, how many pages there are in the list, and the number of records per page. You can use this to move through the list of comments.

Information shown for each comment includes:

5. The date the comment was posted
6. The first 200 characters of the comment are displayed initially. If there are more than 200 characters, this will be shown by '... more' at the end. You can click on 'more' to display the full comment.
7. The article for which the comment was made is listed in the **Article** column, plus the total number of comments for this article
8. Click on **Public View** to view the article being commented on
9. Or click on **Edit Article** to actually edit the article
10. The status of the comment is shown in the **Published** field. Articles can be published or not published. If this field contains a tick then the item is published.
11. Click on the paintbrush to edit the comment. This includes changing the status.
12. Click on the 'X' to delete a comment.

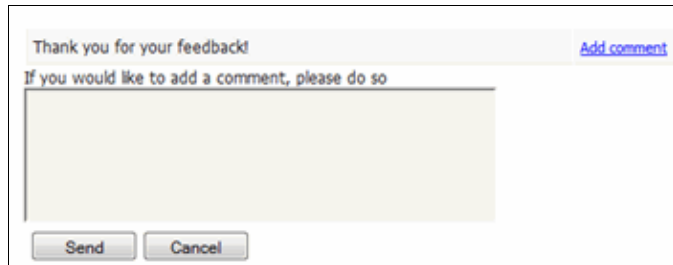
Rating Comments

Users can rate articles to say whether they were helpful or not helpful.

Depending on how you set your knowledgebase up, they can either rate an article as:

- Helpful/Not helpful, or
- Use a star rating system.

When a user rates an article they can also add a comment saying why they rated the article the way they did.

A screenshot of a web-based feedback form. At the top, it says "Thank you for your feedback!" with a blue link "Add comment" to the right. Below this is a prompt: "If you would like to add a comment, please do so". Underneath the prompt is a large, empty text input area. At the bottom of the form are two buttons: "Send" and "Cancel".

These comments are emailed to the supervisor for that category, or if no supervisor is assigned, to the system administrator.

You can see these rating comments in the Admin area

- Choose the **Feedback** menu
- Select the **Rating Comments** tab

This functionality works in version 3.5 and above

Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0.

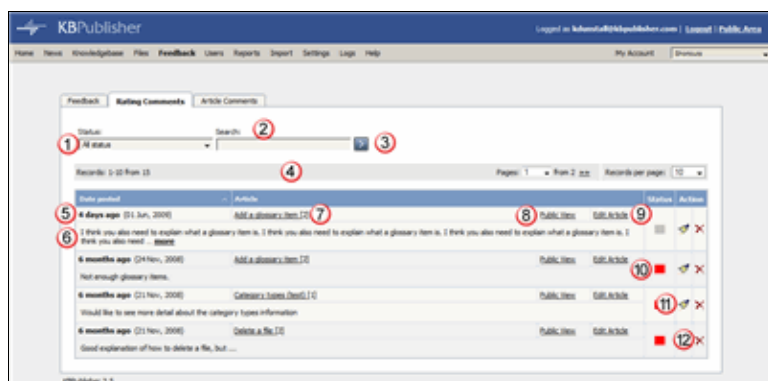
For a complete list of changed/new functionality, please see [version 4.0 release notes](#)

The rating comments screen explained

The Ratings Comments screen displays a list of the comments users have added when they rated an article 'Not helpful'.

To get to this screen:

- Select the **Feedback** menu
- Then click on the **Rating Comments** tab.



1. The **Status** drop-down list allows you to filter the rating comments list by a single status, such as new comments, or those for articles in review.
2. Use the **Search** field to search for specific text in the rating comment.
3. Once you have changed the status or typed in a search command, use the Go button to get the results back.
4. The records line contains information about how many rating comments are displayed, how many pages there are in the list, and the number of records per page. You can use this to move through the list of rating comments.

Information shown for each article includes:

5. The date the article was posted
6. The first 200 characters of the comment are displayed initially. If there are more than 200 characters, this will be shown by '... more' at the end. You can click on 'more' to display the full comment.
7. The article about which the comment was made is listed in the **Article** column, plus the total number of negative rating comments for this article
8. Click on **Public View** to view the article being rated
9. Or click on **Edit Article** to actually edit the article
10. The current status of the comment is shown in the **Status** field as a color. Red denotes a new comment, yellow denotes in progress (the article is being reviewed), blue denotes that the article is currently being updated and grey denotes a comment that you have chosen to ignore. (You can change the statuses and the colors from the **Settings** menu, **Lists** tab.)

If you double-click on the status you open the comment to edit it.

11. Click on the paintbrush to edit the comment. This includes changing the status.
12. Click on the 'X' to delete a rating comment.

This functionality works in version 3.5 and above

Users

All about users

The User input screen explained

You can't have a knowledgebase without users. In KBPublisher we have readers, contributors, authors, editors, moderators and administrators. Or you can set up your own user types.

1. **First Name**, **Last Name** and **Middle Name** make up the user's name. First and last name are compulsory, middle name is not.
2. **Email** is the user's email address. This is the email to which all KBPublisher communications will be sent. Email is also compulsory. Emails are also unique, so you cannot have more than one user in the knowledgebase with the same email address.
3. **Telephone** is the user's contact telephone number.
4. **Company** is the company the user works for. If you intend to associate a company with the user, then this company must have first been set up in KBPublisher.
5. **Roles** allow you to group users, and to further control what content a user can see.

To add a role:

- Click on the + to the right of the role field. This takes you to a new screen listing all roles
- Double-click on each role you wish to allow the user to take to add the the role to the list of assigned roles
- When you are done, click OK to return to the user screen

6. **Privileges** control the type of access the user has to KBPublisher.

There are five default privilege groups.

- ◆ **Administrator** sets up the system, controls user accounts, designs the site and so on

- ◆ **Moderator** has access to every part of the system except Settings and Import/export. The moderator generally creates users, organizes categories and manages the knowledgebase on a day to day basis
- ◆ **Editor** can add, edit and delete their own and other users articles, files, comments and visitors' questions. This is the person responsible for the overall content of the knowledge base.
- ◆ **Author** provides the actual content. An author can add, edit, delete or publish their own articles and files. When they have completed an article and published it, the article appears immediately in the article list
- ◆ **Contributor** also provides content, and can add edit or delete their own articles and files but the articles and files do not appear in the knowledgebase immediately. They must be approved by an editor or a moderator. Once an article or file is approved, the contributor can no longer edit it.

You can also create your own privilege groups.

Users may also be set up with no defined privilege. These are the **public** users.

7. The **Username** is the name the user uses to log on. If you click **set as email** here, the username will be the name you typed into the email field. You must provide a username.
8. The **Password** is the password the user will use to log on. Because this is a password, the text you type is replaced by dots. You can also generate a random password instead, by selecting **Generate random password**.
9. Because there is no way of seeing what you typed into the Password field, you need to retype the password into the **Password (confirm)** field.
10. **User notes** are comments the user adds when he or she fills in the form to request user access
11. **Private Admin notes** are notes that can be added by the administrator when adding or updating the user. The user does not see these.
12. The administrator adding the user can automatically **subscribe** them to news, files and articles. The user is then notified of any changes to these. Click **All** to subscribe them to all changes, or click to select individual subscriptions. Use <Shift> or <Ctrl> to select more than one.
13. A user must be **Active** to be able to log on to the system. An **inactive** user cannot log onto the system at all, and user who is **pending (approval required)** has been set up but is still not able to access the system until a moderator or administrator approves them.
User statuses could be managed at *Settings->Lists->User Status*.
Note that inactive users can still see any parts of the public area that are open to everyone. That is, that users don't have to log on to see.
14. If **Notify user** is checked, the user will receive an email once their access has been set up.

Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0.

For a complete list of changed/new functionality, please see [version 4.0 release notes](#)

Add a user

To add a new user

- Click on the **Users** menu
- Click on **Add New**.

Once you are on the Users screen you must complete the following sections:

- Give the user a **First Name** and a **Last Name**
- Add their **Email**
- Give them a **Username**. If you prefer, you can set their email as their user name.
- Set up a **Password**

The following items are optional:

- Assign a **Privilege**. If you do not assign a privilege the user will have standard read access to the public area.
- To classify the user, and provide another level of access, include a **Role**.
- You can include extra user details such as a **Middle Name, Phone** and **Company**
- You can add comments about the user or registration
- You can automatically subscribe them so that they receive changes to news, articles or files
- To give the user immediate access to the system, make this user **Active**
- To send an email to the user after then that their user ID has been created, check **Notify User**.

You can find out [more](#) about each of these fields on the User screen and how they work in the [User Screen Explained](#)

Once your user has been set up:

- Click **OK** to save it.

Tips:

- If you leave this page before you click OK, your article will not be saved
- If you have a number of users to add from another database, say, you may want to [import users](#) instead of adding them
- Or you may choose to [allow users to register](#), which effectively allows them to create their own user.

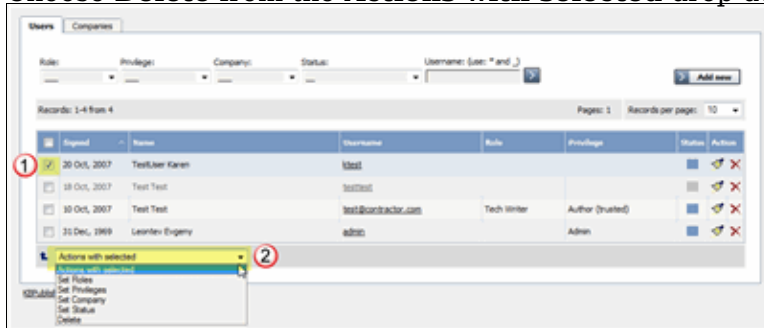
Delete user

The quickest way to delete a single user is to:

- Click on the **Users** menu
- Click on the red 'X' under **Actions** to **delete** the user
- Click **OK** to confirm the deletion.

The second way allows you to delete more than one user at the same time.

- Click on the **Users** menu
- Check the box to the left of the user or users you wish to delete
- Choose **Delete** from the **Actions with selected** drop down box



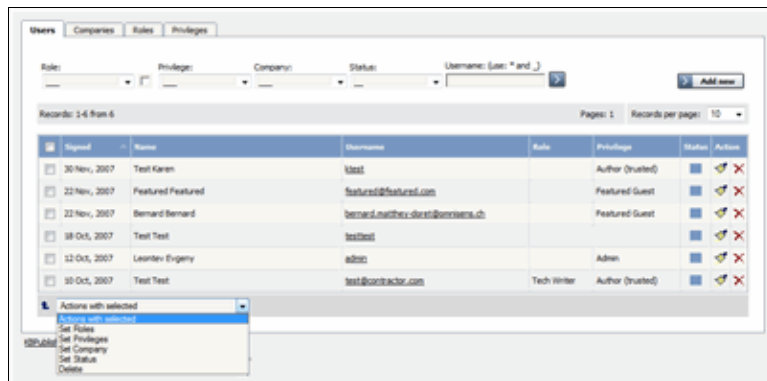
- Click **OK**
- You will be asked if you really want to delete the user. Click **OK** to confirm.

Bulk update users

KBPublisher allows you to bulk update users to:

- Set roles
- Set privileges
- Set the user status
- Assign users to a company
- Automatically subscribe them to news, articles or files
- Delete users.

You can do this direct from the **Users** menu, **Users** tab.



To update the users:

- Check one or more users to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Import users

You can import users in bulk. You might want to do this if you are changing over to KBPublisher from an old system, or if you have signed up a new company or organization and the company provides you with a list of users to create.

The process is:

- Create a file of users to import
- Upload a test sample to the system
- Import.

Create a file of users to import

First, you need to create your file of users. This is a comma-separated (CSV) text file that consists of some or all of: **first name**, **last name**, **email**, **username**, **password**, user ID, date registered, middle name, telephone number and an active flag.

- The first five fields (highlighted bold) *must* be included. You can include some, all or none of the others as required.
- They do not have to be in the same order as above, but each line in the import file must contain the same fields in the same order.
- The password is encrypted. You cannot import plain text passwords; they must be encrypted in MD5 format. Ensure that the person providing you with the list encrypts the passwords.
- The active flag defaults to '1', which is active, so the only time you would set this is if you don't want the users to be active.
- Place the data for each user onto a single line, and separate each field by a comma. Do not include spaces before or after the comma.
- The [TestImportUsers.csv](#) file is a sample that shows what your upload file should look like. This file includes the five default fields only.
- Field sizes and types are specific, as per the table below. Your data must fit within these parameters or the upload will fail.

Field	Type/size	M/O	Comments
first_name	varchar(50)	compulsory	
last_name	varchar(100)	compulsory	
email	varchar(100)	compulsory	
username	varchar(50)	compulsory	
password	varchar(32)	compulsory	Encrypted. MD5 format.
imported_user_id	int(10) unsigned	optional	
date_registered	date	optional	Format YYYY-MM-DD. If not supplied will use current date.
middle_name	varchar(50)	optional	

phone	varchar(20)	optional	
active	tinyint(1)	optional	Default = 1

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported users and try again. Create a test file and run that first.

- Copy the first, say, three lines of your text import to a separate file
- Either:
 - ◆ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ◆ Upload the file to the server

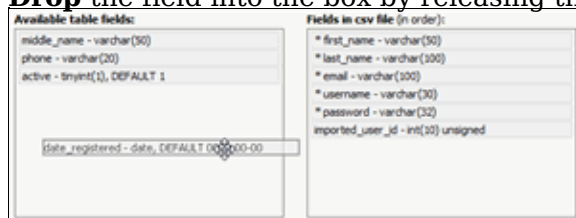
Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import/Export menu**
- This brings up the **Import Users** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and open it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Move the **CSV fields** around to specify which fields are in the file and what order they are in.
Do this by clicking on the name of the field you want to move and dragging and dropping it into the appropriate place.

For example, suppose you only want the five mandatory fields included. You need to move the *date_registered* and *imported_user_id* fields out of the **Fields in CSV** box and into the **Available table fields** box. Let's start with the *date_registered* field.

- ◆ Click on the *date_registered* field and hold the mouse down
- ◆ While holding the mouse down, **drag** the *date_registered* field over to the **Available table fields** box
- ◆ **Drop** the field into the box by releasing the mouse



Make sure that you place it in the order it appears in the file.

- Change **CSV options** if required.
- Click **Load**.

Once the load is complete you are returned to the Import Users tab. At the top of the screen you see a message telling you whether the import was successful and how many users were imported.

- If the import reports as successful, click on the **Users** tab to check the result for yourself.

Fix any problems

All going well, you should now have three new users. Check them carefully and ensure that everything worked as you expected.

If you had problems, delete these three users, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the users.

Import users

Import the rest of the users using the same process as for the test file, only this time using the real data file.

Note:

- Imported users have no roles or privileges.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.
- Use the **bulk actions** option to change roles, privileges, etc.

Companies

Companies provide another level of information about users. When you create a user you can assign the user to a specific company.

Companies are not compulsory in the knowledgebase. You would use them if your users were from a small number of companies, but if your users came from all around the world and were a mix of individuals and company users you probably would not bother.

Some examples where you might use them:

- Your users come from a finite number of companies and you have multiple users in each company
- When you license the knowledge in your knowledgebase and charge the company for access

Some examples where you probably wouldn't:

- Your users come from all around the world
- You would have to set up a different company for every user
- When there is only one company (although you could also set up the company in this case; it wouldn't matter either way).

Privileges

User privileges

Any user can read articles, but in order to create articles and to publish them to the knowledgebase, users must have certain privileges.

For example, to actually write articles a user must have author or contributor privileges.

To publish the article for other users to read, they must be in the author, editor or moderator privilege groups. KBPublisher comes with five default privilege groups, and you can also create your own.

There are five default privilege groups.

- **Administrator** sets up the system, controls user accounts, designs the site and so on
- **Moderator** has access to every part of the system except Settings and Import/export. The moderator generally creates users, organizes categories and manages the knowledgebase on a day to day basis
- **Editor** can add, edit and delete their own and other users articles, files, comments and visitors' questions. This is the person responsible for the overall content of the knowledge base.
- **Author** provides the actual content. An author can add, edit, delete or publish their own articles and files. When they have completed an article and published it, the article appears immediately in the article list
- **Contributor** also provides content, and can add edit or delete their own articles and files but the articles and files do not appear in the knowledgebase immediately. They must be approved by an editor or a moderator. Once an article or file is approved, the contributor can no longer edit it.

You can also create your own privilege groups.

Here is a quick chart of default user types in KBPublisher

	No privileges not logged in	No privileges logged in	Contributor	Author	Editor	Moderator	Admin.
Read published articles/files	●	●	●	●	●	●	●
Read private published articles/files		●	●	●	●	●	●
Add comments*	●	●	●	●	●	●	●
Rate articles*	●	●	●	●	●	●	●
Email administrator*	●	●	●	●	●	●	●
Create articles			●	●	●	●	●
Edit/delete own draft articles/files			●	●	●	●	●
Edit/delete own published articles/files				●	●	●	●
Edit/delete other authors' articles/files					●	●	●
Publish articles				●	●	●	●
Add/edit delete glossary items					●	●	●
Manage user comments					●	●	●
Manage categories						●	●
Create/edit/update users						●	●
Manage templates						●	●
Import/export articles/users							●
Change KBPublisher settings							●

Privilege levels

Each user type has a **privilege level**. The privilege level defines who can edit users of this level. Users cannot edit other users with a privilege level lower than or equal to their own.

Admin users always have a privilege level of 1. They can edit any other user. In the standard setup editors have a privilege level of 3, while authors have a privilege level of 4 and contributors 5. This means that an editor could--if he had edit user access--edit author and contributor users while a contributor could not edit any users except other contributors (again, and only if he had edit user access). None of them can edit admin users.

This gives an extra level of security when editing users.

* Adding comments, rating articles and sending emails to the administrator are all options that can be turned on or off in the settings. Hence while these options are available, they must also be turned on if you wish to use them.

Create new user privilege

Privileges control what a user can do on the system. There are five default privilege groups, but you can also create your own.

You must have administrator access to create new privileges.

To create a new privilege group:

- Click on **Users**
- Choose the **Privileges** tab
- Click **Add New**

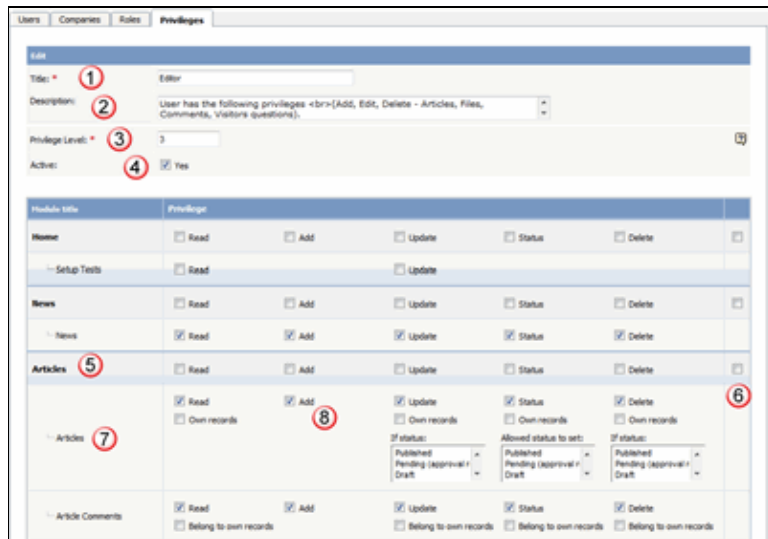
Complete the following:

- **Title** is compulsory
- **Privilege level** is also compulsory. This controls user security. Users cannot edit users with a privilege level less than their own, even if the access settings allow them to edit users.
- Check privileges as required. A user will be able to do anything that is checked. The [privilege screen explained](#) tells you how each of the options work.

You may also wish to:

- Add a **description** to explain why this group has been set up and how it should be used
- Prevent users in this group from logging on by making the group **inactive**.

The Privilege Screen Explained



1. **Title** is the name of the privilege. Title is compulsory.
2. **Description** is used to remind you what the privilege is for. For example, when the administrator creates a new privilege, he or she would use the description to explain what the privilege does and how it should be used.
3. **Privilege level** denotes the level of security for this privilege. Users cannot update other users with a privilege level lower than or equal to their own, even if they have user update access. This is also compulsory.
4. When the privilege is set to **Active** (that is, active is checked), users with this privilege can log in. If it is not set, then users with this privilege cannot log in. Thus, with one click you can prevent all users with a specific privilege from logging in.
5. You can control the privileges for each module in KBPublisher separately. This means you can give access just to one area only if you wish. For example, you may allow access to the knowledgebase, but not to Files, Feedback, Users, Settings or Import/Export. Or you may have hired a contractor to import a list of users for you, and you give them access to the Import/Export section only, but not to other areas of the knowledgebase.
6. Privileges can be applied at the top level for the whole module, or they can be specific to actions in the module. For example, you can apply privileges to the knowledgebase by checking the appropriate privileges in the Knowledgebase line and then checking **Apply to child** to apply these privileges to everything in the module.
7. Or you can apply privileges to each sub-module.
8. Most of the privileges are self-explanatory.
 - ◆ When **Read** is checked the user can view items. If **own records** is also checked, they can only read records they have created. Otherwise they can read all records. **Belong to own records** denotes items like comments, and allows the user to manage comments that belong to items where **own records** is checked.
 - ◆ When **Add** is checked they can create new items.
 - ◆ When **Update** is checked they can change existing ones. If **own records** is also checked, they can only update records they have created. Otherwise they can update any record. If one or more statuses are selected under **If status**, then the user can only update articles with the assigned status. (To select more than one status hold the <Ctrl> key down and click each status you want.) If no status is selected, the user will be able to update records with any status. **Belong to own records** means that the user can update comments for items they own.

- ◆ When **Delete** is checked the user can delete items. If **own records** is also checked, they can only delete records they have created. Otherwise they can delete any record. If one or more statuses are selected under **If status**, then the user can only delete articles with the assigned status(es). **Belongs to own records** means that the user can delete comments for items that are designated as their own.
- ◆ **Status** allows the user to change the status of an article from, say, unpublished to published. If **own records** is checked, then the user can only change the status of records they have added. If one or more status is selected under **allowed status to set**, then the user can only change items to the selected status(es). If no status is selected, the user can change the record to any status.

Set default user privileges

New users can be created two ways. They can be set up by the knowledgebase administrator, or users can register themselves.

By default, when users register KBPublisher creates them with no privileges. You can change this so that new users are created with a specific default privilege by:

- From the **Settings** menu choose the **Public Area** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Privilege for new registered users** from the drop-down list of privileges
- Click **Save**.

All new users who register after this are created with the new default privilege.

You must have administrator access to change the settings.

Roles

User roles

Roles allow you to set up a hierarchy of users and to control which articles users can see.

Roles are set up as tree structures, and when you mark an entry as private to a specific role then users with this role and with parent roles have access to the article. Any role below it in the tree, and roles that do not belong to 'current tree', will not be able to access the article.

For example, suppose you have the following roles:

Title
Employees
Customers
Contractors
... Manager
... Beta Tester
... Tech Writer
... Programmer
Partners

In the above tree the Contractors role has a sub-role of Manager, and below that sub-sub-roles of Beta Tester, Tech Writer and Programmer.

Users can be assigned to multiple roles. Thus your programmer could also be an employee.

If you mark an article private read and assign to it a role of 'Programmer', then contractor managers and programmers will be able to access the entry. No one else will have access to this article.

Note:

- Users with administrator privilege have access to any article in any category.

Create new user role

Roles control access to knowledgebase articles and files. Some default roles have been created, but you can also create your own.

You must have administrator access to create new roles.

To create a new role:

- Click on **Users**
- Choose the **Roles** tab
- Click **Add New**

The following are compulsory:

- You must include the role name in the **Title**
- The **Parent role** denotes where in the list of roles this role is placed. If you choose 'Top Level' your new role becomes a top level role. Otherwise, choose the parent role for your new role.

You may also wish to:

- Add a **description** to explain why this role has been set up and how it should be used
- Change where in the role hierarchy the role is listed by changing the **Order** of the group.

Set Default User Roles

New users can be created two ways. They can be set up by the knowledgebase administrator, or users can register themselves.

By default, KBPublisher creates registered users with no designated role. You can change this so that new users are created with a specific role by:

- First, ensure that the role exists. If it doesn't, create it first
- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Role for new registered users** from the drop-down list of roles
- Click **Save**.

All users who register after this are created with the new default role.
You must have administrator access to change the settings.

My Account

How to use My Account

How do I change my password?

To change your password:

- Log in to the knowledgebase
- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen
- Type in your **old password** if required
- Type your new password into the **password** field
- Retype the password in the **password (confirm)** field
- Click OK.

How do I change my screen width?

The screen width is the width of the box that displays the knowledgebase, including any menus. The width of the display is set up by the administrator but some people have narrower screens and find that they have to keep scrolling to the right to read articles. Or they may have wide screens and want the display to cover more of the screen.

You can personalize the width as follows:

- Click on **Admin Area** if you are in the public view
- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen, underneath your login details
- Click on the **Settings** tab
- Change the **Box Width** to the width you want KBPublisher displayed. You can use a set width, in pixels (px), or use a percentage (e.g. 100%). The default box width is the width that the administrator has set up for the database.
- Click **Save**.

This functionality works in version 3.5 and above

How do I display more articles on a page?

Ten articles are listed on each screen by default, and you have to click more to see the next ten, and so on. The administrator can change this for everyone.

You can also personalize it for yourself, and display 20 or 40 records at a time instead:

- Click on **Admin Area** if you are in the public view
- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen beneath your login details
- Click on the **Settings** tab
- Choose 10, 20 or 40 records from the drop-down list for **Number of records per page**
- Click **Save**.

This functionality works in version 3.5 and above

Change the order articles and files are displayed in

By default, articles and files are displayed in ascending date order. That is, the last article or file updated is at the top of the list, and the first one updated is at the bottom.

Sometimes you want to see the list differently. You can order by date added (newest date first), date added (oldest date first), date modified (newest date first), date modified (oldest date first) and in alphabetical order.

- Click on **Admin Area** if you are in the public area
- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen, beneath your login details
- Click on the **Settings** tab
- To change the order that articles are sorted in, choose an appropriate order in **Sort Articles By**
- To change the order that files are sorted in, choose an appropriate order in **Sort Files By**
- Click **Save**.

This functionality works in version 3.5 and above

Subscriptions

Subscriptions allow you to be notified when:

- A single article is changed
- Any article in a specified category is changed, or when new articles are added to the category
- A single file is changed
- Any file in a specified category is changed, or when new files are added to the category
- News is added or changed
- A comment has been added to an article or file.

When you set up a subscription for a specified item or category, then KBPublisher sends you an email when that file or category is changed.

You can see what you have subscribed to on the **Subscriptions** tab under **My Account**.



This functionality works in version 3.5 and above

Subscribe to an article

Subscribing to an article means that you receive email notification of any changes to that article.

To subscribe to a single article

- Open the article to read it
- Click on **Subscribe** in the quick access panel on the right-hand side of the screen



The Subscribe option changes to Unsubscribe, and from now on until you unsubscribe you will receive notification whenever this article is edited.

To subscribe to all articles in a category

- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** for **Article Categories**
- Click on **Add New**
- Select a category you wish to subscribe to and then click on the **plus (+)** button to the right of the category list. This adds the category to the **Selected Categories** list. Note, there is also an option to select all categories, if you wish
- Click OK to save your subscription.

You can see which articles you have subscribed to in the Subscriptions tab under My Account.

This functionality works in version 3.5 and above

Unsubscribe from an article

To unsubscribe direct from the article

- Click on the article to read it
- Click on Unsubscribe in the quick access panel on the right-hand side of the screen

To unsubscribe via the subscriptions list

You can unsubscribe from single files this way, and whole categories

- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Articles** if it's for a single file, or from **Article Categories** if it's for the whole category
- Click **unsubscribe** for the article or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Subscribe to a file

Subscribing to a file means that you receive email notification of any changes to that file.

To subscribe to a single file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to subscribe to
- Click on **Subscribe** in the file details box



The Subscribe option changes to Unsubscribe, and from now until you unsubscribe you will receive notification whenever this file is changed.

To subscribe to all files in a category

- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** for **File Categories**
- Click on **Add New**
- Select a category you wish to subscribe to and then click on the **plus (+)** button to the right of the category list. This adds the category to the **Selected Categories** list. Note, there is also an option to select all categories, if you wish
- Click OK to save your subscription.

You can see which files you have subscribed to in the Subscriptions tab under My Account.

This functionality works in version 3.5 and above

Unsubscribe from a file

To unsubscribe direct from the file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to unsubscribe from
- Click on **Unsubscribe** in the file details box

To unsubscribe via subscriptions

You can unsubscribe from single files here, or from whole categories

- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Files** if it's for a single file, or from **File Categories** if it's for the whole category
- Click **unsubscribe** for the file or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Subscribe to news

To be notified when news items are added to the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Subscribe**

You will be notified daily of changes to news items.

This functionality works in version 3.5 and above

Unsubscribe from news

To no longer receive notifications about updates to the news area of the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Unsubscribe**

This functionality works in version 3.5 and above

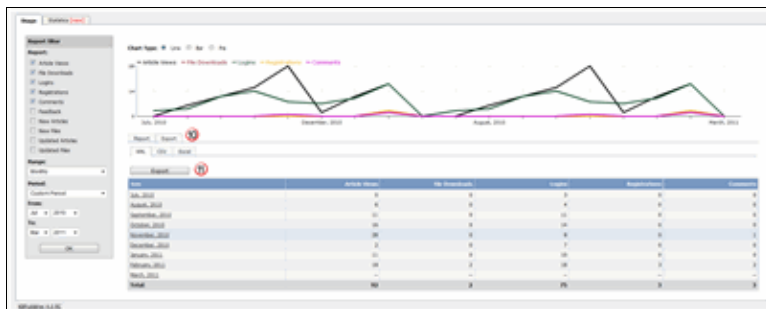
Reports

Reports functionality in KBPublisher

The Reports Screen Explained



1. **Report Filter** allows you to choose which statistics you want to report on. Check each item you want statistics for
2. **Range** allows you to determine whether the stats are shown for each day, for a month at a time or for a whole year.
3. **Period** is the time period over which the stats are to be listed for. The options here depend on what you choose in the range. For example, if you choose monthly, then the period options will be this week, previous week, this month or the previous month. You can also select a custom period. If you choose this KBPublisher allows you to choose a From date and a To date.
4. Once you have selected filters, a range and a time period, click the **OK** button to produce the report.
5. The report is displayed as a graph--you can choose line, bar or pie charts
6. And as a table on screen in the **Report** tab.
7. You can click on a **Date** field to break it down even further.
For example, in the diagram above, clicking on July 2010 displays the statistics for each day in July.
8. The statistics you requested are displayed as a table.
9. If you wish, you can also **Export** the results.



10. If you click on the **Export** tab, you get the option to export the results in XML, CSV or Excel format.
11. Once you have chosen the appropriate format to export in, click on the **Export** button to export the data. You will be asked if you want to open the file or save it.

Note:

- Report functionality only works when scheduled tasks are turned on
- Data collected is summary data. We do not break down data to individual user level, we

collect totals only.

This functionality works in version 3.5 and above

Export Reports

You can export your reports as xml, csv or Excel files.

Generate the report first:

- Click on the **Reports** menu
- Choose the **Usage** tab
- Select the statistics you want to report on from the **Report** options in the **Report Filter** box
- Choose whether you want the stats by day, month or year from the **Range** options
- Choose a reporting period from the **Period** options
- Click OK to **generate** the report.

Then export the generated results:

- Click on the **Export** tab
- Click on the **XML**, **CSV** or **Excel** tab depending on whether you want to export the file as xml, as a comma separated list or direct into Microsoft Excel
- If you choose CSV you will be presented with further options. Select those appropriate
- Click **Export**
- What happens next depends on your browser and your browser settings. In Internet Explorer and Firefox this brings up a message panel asking if you want to open the file or save it. In Google Chrome it saves the file to your download folder and you can click on it to open it.

If you are using Internet Explorer

- Choose **Open** if you wish to open the file now
- Choose **Save** if you wish to save the file. Browse to a suitable directory, then **Save** to save it.

If you are using Firefox

- Choose **Open with** if you wish to open the file now.
The Open With options suggests a default program you might wish to open the exported file in. For example, both CSV and Excel files offer to open the file in Excel for you. If you wish to change the program to open it in click on the specified file type (e.g. Click on Excel) and choose **Other** from the list. Browse to find the program you want the report to open in, select it, and **OK** to return to the message panel
- Choose **Save File** if you wish to save the file. This saves the file to the FireFox download directory (specified in Tools, Options in Firefox) and opens the download panel so that you can open it if you wish

If you are using Google Chrome

- The export command automatically saves the file to the download directory specified in the download directory

This functionality works in version 3.5 and above

Statistics

The statistics screen allows you to see

- What are the most viewed articles
- The articles with the highest rating
- The articles with the lowest ratings
- The articles with the most comments
- The most downloaded files
- The most popular search terms used, and the least popular
- Plus general statistics about articles, files, news, feedback and users.

You can export the results as xml or csv files for use elsewhere.

The screenshot shows the 'Statistics' tab in the KSPublisher 4.3 interface. It contains several data tables:

- All articles:** All articles (171), All categories (48), All glossary (44).
- Articles by status:** Published (158), Pending (approval required) (0), Draft (6), Not published (7), Total (171).
- Articles by private status:** Public (167), Private Read (0), Private Write (0), Private Read/Write (4), Total (171).
- Categories by status:** Published (48), Not published (0), Total (48).
- Categories by private status:** Public (26), Private Read (0), Private Write (22), Private Read/Write (0), Total (48).
- Hottest viewed articles:** A list of articles with their IDs and view counts, such as 'Add a picture to an article' (162) and 'User privileges' (89).
- Articles with high rating:** A list of articles with their IDs and ratings, such as 'test22222444' (10.0) and 'ar1265' (10.0).
- Articles with low rating:** A list of articles with their IDs and ratings, such as 'Import users' (0.5) and 'Delete a file' (1.0).
- Hottest commented articles:** A list of articles with their IDs and comment counts, such as 'Add a picture to an article' (8) and 'Test curly braces' (3).

Note:

- We keep records at summary level only. We do not break data down into individual users.

This functionality works in version 4.0 only

RSS

An explanation of RSS feeds and how to set them up

Turn RSS feeds on or off

You must have administrator access to do this.

To turn RSS feeds on

- Click on **Settings** menu
- Choose the **Public Area -> Common** tab
- Go to the section titled **RSS Feeds** at the bottom of the screen
- In the **Generate RSS feeds** field choose either **One Channel for whole knowledgebase**, or **Channel for every top category** depending on whether you want multiple feeds or one feed for the whole knowledgebase.
- Click **Save** to implement the changes.

To turn RSS feeds off

- Click on **Settings** menu
- Choose the **Public Area -> Common** tab
- Go to the section titled **RSS Feeds** at the bottom of the screen
- In the **Generate RSS feeds** field choose **Do not generate any RSS feeds**
- Click **Save** to implement the changes.

Change RSS feed from single feed to separate category feeds

By default, your knowledgebase is set up to display a single RSS feed for the whole knowledgebase. You may, however, want to change this. You might want to turn it off altogether. Or you might want to change it so that each top-level category has its own feed.

Separate feeds are useful when your users are only interested in information about specific categories. For example, suppose your knowledgebase was about internet browsers. You have three main categories: Internet Explorer (IE), Firefox and Sahara. People who use Sahara are not interested in anything IE or Firefox related, they are only interested articles pertinent to Sahara. Likewise, Firefox users do not generally use Internet Explorer. In this case, a separate feed for each top category is ideal.

You require administrator access to do this.

- Click on **Settings** menu
- Choose the **Public Area -> Common** tab
- Go to the section titled **RSS Feeds** at the bottom of the screen
- In the **Generate RSS feeds** field choose **Channel for every top category**
- Click **Save** to implement the changes.


Even when this is turned on, a user can still subscribe to the single feed if they wish to.

Note:

Articles designated as "private" are not shown in the RSS feed.

Subscribe to RSS feed

KBPublisher produces an RSS feed which users can subscribe to by:

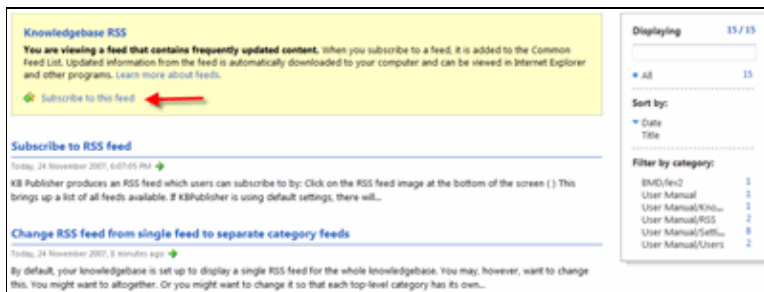
- Click on the RSS feed image at the bottom of the screen ()
- This brings up a list of all feeds available.

If KBPublisher is using default settings, there will only be one option available--**Knowledgebase RSS**.

If multiple feeds are set up, this list will also include a feed for each top-level category.



- Click on the RSS feed image to the right of the feed you wish to subscribe to to bring up the RSS page.
- Click on **Subscribe to this feed**



- If you are using Internet Explorer (IE), choose the RSS feed directory (**Create In**) where you wish the feed to be displayed and click **Subscribe**.
- If you are using Firefox, select the application under which you wish to read the feed from the **Subscribe to this feed using** list and click **Subscribe now**.

Note: Articles designated as 'private' are not shown in the RSS feed.

Settings

An explanation of the Settings module and how it works

The License tab explained

The license tab provides details of your KBPublisher customer number, the type of license you purchased and when you purchased it.

When you purchase from KBPublisher your license key and software downloads are made available under the My Licenses tab in the [Client Area](#) on the KBPublisher site. After you install KBPublisher, copy the license key provided in the Client Area here.

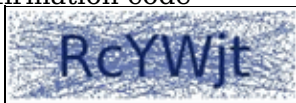
The Admin Tab Explained

The **Admin** tab is the first tab under **Settings**. The settings here apply to the admin area, and to admin users.

Only administrators can change the settings on this tab.

1. **Filter** allows you to reduce the number of fields displayed to make it easier to find.
2. The **Security / Privacy** settings control user logons.

- **Session expires (in minutes)** controls how long before the user is automatically logged out when they do not use the system. In the example above, users will be logged out if they do not use the knowledgebase for two hours. If you wish to turn automatic logout off, set this to 0.
- **Enable visual confirmation to login** controls whether a user has to type a confirmation code



e.g. before they can log on.

- If you want the user to type in their old password to allow them to change to a new one, check **Old password required to change password**. If you don't check this, then the user can change the password without typing their old one.

3. **Look & Feel (settings)** control how the admin area is displayed.

- **Box width** controls the width of the frame in which the administrator screen is displayed. You can set the width in either pixels (in the screen example it is 980px), or as a percentage of the width of the user's screen (e.g. 90%).
 - Default **number of records displayed on a page** is the number of records on a page that is first displayed when a user goes to that page. The user can change the setting manually while they are on the page.
 - **Sort articles by** sets up the default sort order articles are displayed in. Sort can be alphabetic, or by date added or modified. Users can override these settings if they prefer a different sort order.
 - Likewise, **sort files by** sets up the default sort order files are displayed in. Again, users can override these settings with their own personal display order preference.
4. The **HTML editor file directory** tells the knowledgebase where to look for the files that you attach as images or links to articles. That is, when you, say, insert a picture into an article, this is where the picture will be found or uploaded.

You can also set up automated reporting of errors by selecting **send critical messages to admin**. This means that if your knowledgebase has critical errors in scheduled tasks, the administrator will receive an email stating that there were problems with the cron jobs and can quickly log on to fix it. The email address that errors are sent to is that of the email administrator defined in the Email settings tab.

5. The **Article** settings history and autosave settings for individual articles.
- The **maximum number of revisions** controls how many revisions are stored for a document. If you set this to, say, 5, then on the sixth revision the earliest version is deleted, overwritten by the new one. If you don't want to keep article history at all, make this 0.
 - KBPublisher can automatically save your article changes at specified intervals. **Autosave recovery information every** sets the number of minutes between autosaves. If you make this 0, you turn autosave off.
7. The **File Configuration** section controls what files can be uploaded. This includes:
- Where the files are uploaded to (**files directory**). This is the server path format.
 - How big the files can be (**max file size**)
 - Types of files that can be uploaded (**allowed extensions**)
 - Types of files that cannot be uploaded (**denied extensions**)
 - Whether or not to include the files in the search, if possible (**extract raw text**)
 - Whether or not to parse (index for searching) content of PDF files, and if you do parse them, where the program is that gets the text out of the PDFs (**XPDF installation path**)
 - Whether or not to parse (index for searching) .doc (Word) files, and if you do parse them, where the program is that gets the text out of the doc files (**catdoc installation path**)
 - Whether or not to parse (index for searching) .doc (Word) files, and if you do parse them, where the program is that gets the text out of the doc files (**Antiword installation path**)
You can use either Antiword or catdoc. You don't have to use both.
 - What the auto-load directory files functionality should do when it finds a file listed in the database but no longer on the server (**spy directory missing files policy**)
8. **Set defaults** resets your settings back to the KBPublisher defaults.

The Public Area Tab Explained

The **Public Area** tab is the second tab under the **Settings** menu. The settings here apply to the public view -- that is, to what users see.

Only an administrator can change the settings on this page. The page is divided into three further tabs:

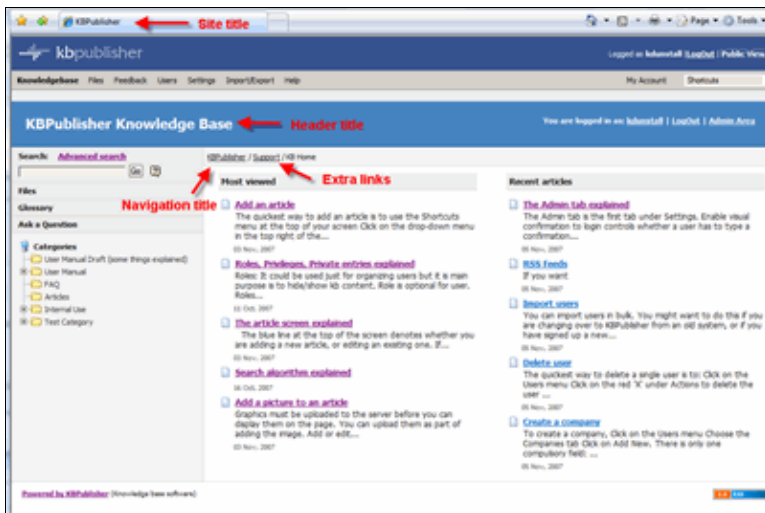
- Common, for settings which are common to the whole knowledgebase
- Articles, for settings which are specific to articles
- Files, for settings which are specific to files.

The **filter** field at the top of the screen allows you to reduce the number of fields displayed. For example, typing *Titles* into the filter field while on the Common tab, restricts the fields shown to those in the *Titles/Meta/Navigation* section.

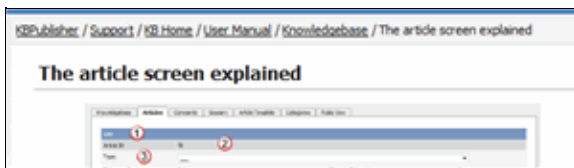
Common settings

1. The **Titles/Meta/Navigation** section controls how the browser displays the knowledgebase.

- **Site keywords (meta)** and **site description (meta)** contain keywords used by search engines to identify your site.
- The **header title** is the text displayed in the header,
- The **navigation title** is the home page in the navigation bar
- **Extra items in navigation** show any extra links in the navigation bar. Extra links in the navigation are added as the name of the link (text to be displayed), followed by a space, followed by a pipe (|) symbol, then another space, then the address. For example, to add a link to your home page you would use *'Home | http://mydomain.com'*. You can add more than one extra link by adding a double pipe (||), surrounded by spaces, between each link. e.g. *'Home | http://mydomain.com || Support | http://mydomain.com/support'*.

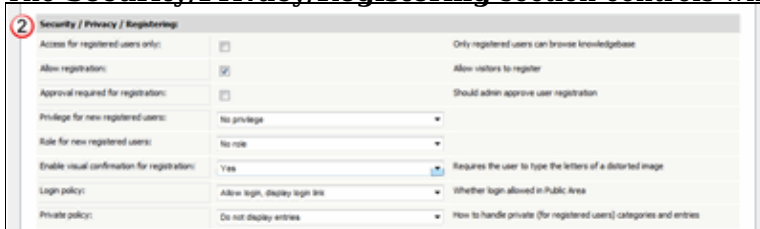


- You can show or hide the article title in the breadcrumb trail at the top of the screen by changing **Display entry title in navigation**



- You can choose whether or not users can see access downloaded files by setting the **Display 'Downloads' link in menu**
- You can choose whether or not users can view the glossary by setting the **Display 'Glossary' link in menu**
- The **search engine friendly URL** controls what you type into the address line when you want to jump direct to an item in the knowledgebase.

2. The **Security/Privacy/Registering** section controls who can log on and how they do it.



- **Access for registered only** means that only people who are registered users can view the knowledgebase. If this is set then even if a user ends up on your site they will not be able to read articles unless they are registered.
- **Allow registration** means that if a user does end up on your site and wants to view the knowledgebase, they can request and (maybe) get access.
i.e. The user comes to the knowledgebase site, gets a message that he has to register to use the site, and gets a registration form to register.
- If **Allow registration** is set, then two things can happen. If **Approval required for registration** is *not* checked, then the user is automatically assigned a user ID and access.
If **Approval required for registration** is set, then they cannot get access until the administrator approves their request.
- When users register they take on the **default privilege** and **default role** assigned here.

- **Enable visual confirmation to register** means the user has to type in a confirmation code before they can register. This is to stop scamming.
- **Login policy** determines whether a user gets a login option on the public view screen, whether they don't get the login option but can still login (if they know the link to the login page), or whether they cannot login at all.
- When a user has not used the public area for the number of minutes specified in the **Session expires in** field they will be logged off. If you wish to turn automatic logout off, set this value to 0.
- The **private policy** setting controls whether content that is locked because it is private is displayed in the menu with a locked symbol, or whether it is simply not visible at all. When this is set to **Do not display entries** then the user only sees items he can access. When it is set to **Display entries as 'locked' sign**, then the user can see the entries title but he cannot read them.
Please note it works only for articles without any role assigned. If private article has any role assigned it is always in "hidden" state for not logged users or for users who do not have access to it.

3. Look and feel

- You can use the default knowledgebase template, or you can specify your own in **Template page to load**. Your template can be pretty much any HTML, with a few extra commands to display the content and RSS feeds. This [article](#) explains more about the template.
- The **View format** allows you to set your knowledgebase up with a left menu or without. The sample screen in section 1, above, shows a knowledgebase with the left menu set.
- If you go with a left menu, you can also choose whether to display Article, File, Glossary and Ask a Question links on the left menu or as tabs across the top of the screen by assigning a specific **Template**.
- The **left menu type** can be a standard menu tree, or it can be a follow-on menu that allows users to click on one article after another to read them.
- If you choose not to display the **header** then the header title (specified in section 1, above) is not be displayed.

Setting up the look and feel is covered in more detail in the [article that explains how to change the way articles are displayed](#).

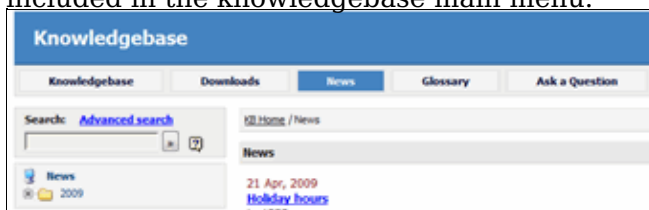
4. The **Feedback** section controls the Ask a Question area of your knowledgebase .

- You can set whether users can contact you using the Feedback facility through **Allow contact us**. You can set this so that all users can contact you, only registered users can contact you, or no users can.
- If **enable visual confirmation for contact form** is set then the user must type in a visual code before they can add any feedback

- **Unchecking enable quick response** turns off the automatic searching and turns the form into a static feedback form. i.e. users type their message into the form and email it to the supervisor, but KBPublisher doesn't do the search.
- **Allow attachments** says whether users can attach documents to their mail. The value here is the number of files that can be attached. When this is set to 0, attachments cannot be included.
- **Allowed extensions** controls the type of files that can be attached.
- **Send attachments with e-mail** must be set if a user is allowed to send attachments in the Feedback form.

5. The **News** section controls whether you have a news section, and if you do, how it is displayed.

- **Enable news module** turns news on or off. If this box is checked news items can be added and users can see them. If it is not, there is no news functionality.
- If you select **display news link in menu** then there a News menu option will be included in the knowledgebase main menu.



- You can control how many news items are displayed on the Public Area home page with the **number of news items on index page**. You can display a maximum of five news items, the last five items added. Set this to 0 to hide news items.

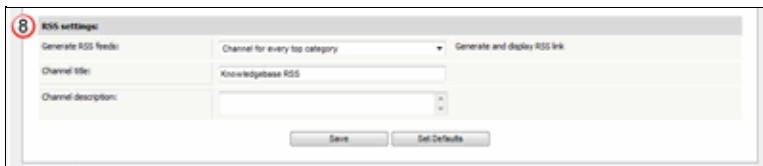
6. The **Search** area controls search options

- You can set define whether the initial search searches the whole knowledges, just in articles or just in files by setting the **By default search in** field. Note that this is can always be overridden by the user in the advanced search.
- If you want users to see auto-suggestions of words as they start to type their word into the search field, set **search suggest**. These searches are based on search results of other users.

7. Whether or not users can subscribe to articles is controlled by the **Subscription** section.

- **Allow news subscription** allows users to subscribe to the news section and get a daily email when news is added
- **Allow item subscription** allows users to subscribe to be notified when articles and/or files are changed or added.

8. Lastly, the **RSS settings** control whether the knowledgebase is available as an RSS feed and how the feed is set up.



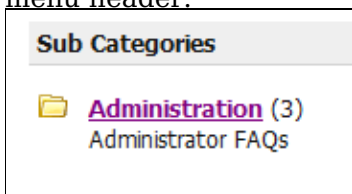
- **Channel Description** is the description included in the tag in the RSS feed.

Articles

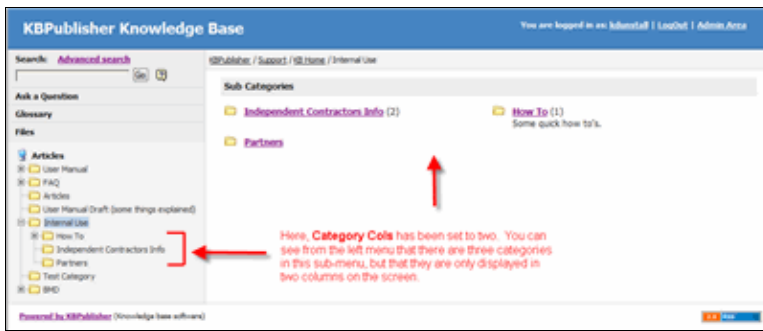
9. **Look and feel (settings)** control what the user sees and how he sees it.



- Articles can be **sorted** by alphabetical order, the date items were added or modified, and by popularity.
- The number of articles displayed on the page is controlled by **Default number of articles**.
- Whether or not people can see the latest articles that have been added is controlled by **Recent articles**. If it is set to 0, recent articles are not shown, otherwise the number of recent articles displayed is the number set here.
- Likewise whether or not people can see the most popular articles is set under **Most viewed articles**.
- **Others in this category** controls whether or not the 'Others in this category' sub-heading is displayed at the bottom of the screen, and how many items are displayed if it is
- **Display prev/next navigation** controls whether the user sees links to the next article and previous article at the bottom of the screen.
- **Count entries/sub-category** defines whether a count of the entries is displayed in the menu header.



- **Category cols** defines how many columns the categories are displayed in on the page in public view. If this is set to 0, no categories are displayed.



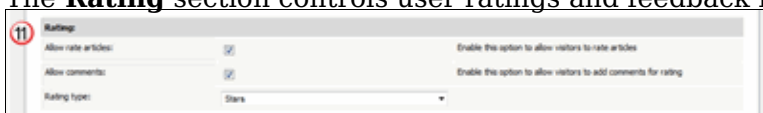
- You can add text to the front of an article heading using the **Article title prefix pattern**. For example, if your article is named *Keeping Pets*, you can use the article title prefix pattern to make this: *Question: Keeping Pets*. Even better, if you use types in your knowledgebase, you can customize the article prefix to each type. Suppose, for example, you have two types of articles. One is *Facts*, the other is *General info*. If you wish you can change the title to include the type. e.g. *Fact: Climate change is happening* and *General info: What are greenhouse gases?*. You can include the article number as part of the article title prefix as well. e.g. *Q: What can I do to help?*
- If you choose to include the article number in an article title prefix, you can also say how many digits the number will have by specifying an **entry ID padding** number. For example, if you had 100 questions and chose an article title prefix of 'Q', by default they would be numbered *Q1...Q100*. If you would prefer it to be *Q001: .. Q100* set the entry ID padding to 3.
- You can show or hide files (Download area) using the **Display 'files' link**. You might use this if you plan on creating articles only, and not uploading files to the knowledgebase.
- You can show or hide the glossary using the **Display 'glossary' link**

10. The **Comments** section controls article comments.



- You can set whether comments are allowed and who can make comments through **Allow add comments**. This can be set to all users, only registered users, or no users.
- Likewise, you can set it so that anyone who adds a comment must type a visual confirmation code before they can send it.
- Whether or not comments are published immediately, or must be approved first is controlled by the **Comment approval policy**.
- You can set the **number of comments displayed per page** to 10, 20, 30, 40 or 50.
- And you can say whether to **display comments on the article page**, or set it so that you must click on a comments link to read the comments.

11. The **Rating** section controls user ratings and feedback for negative ratings.



- **Allow rate articles** lets the user rate articles in your knowledgebase. Ratings can be text--helpful/not helpful--or you can use a star system where the user rates the article

out of five stars.

- You can also turn on **allow comments**, which brings up a feedback box when a user rates an article so they can provide feedback on why they rated it the way they did.

12. The way the article is displayed on the preview screen is defined in the **Article preview format** section.

- The number of characters displayed in the preview is controlled by the **Article Character Limit**
- Whether the last date the article was updated is shown is controlled by **Display updated date**
- You can also specify whether to display the **rating, number of comments** and **number of views**.

13. This is where you define what to show the **Detailed Article Block**.

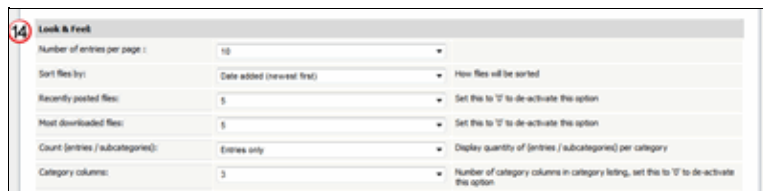
Note that if you are logged in and have edit rights, you will also see the edit options: edit, quick edit and category listing. Plus, some of the information in this block is controlled by other knowledgebase settings, particularly comments and subscriptions (see points 6 and 9 above).

- **Display article block** displays the article ID and when the article was last updated.
- **Display private block** shows whether the article is public or private. If an article is private, a user can hover his/her mouse over the key graphic to see which roles have access.
- **Display author block** displays the date an article was created and the name of the author. If the article has been updated since, it also displays the name of the person who last updated it and when that was. The format of the author/updater's name is controlled by the **user format for author block**.
- You can also choose to include **PDF, print** and **send to friend** links, and whether or not to display the number times this article has been **viewed**.



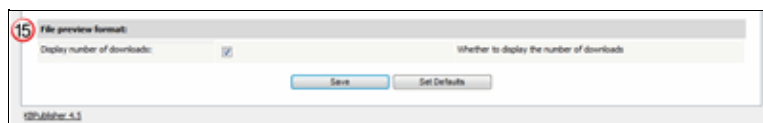
Files

Whether or not users can see uploaded files is controlled by the **Display Files link** on the **Knowledgebase** tab, but if they can see files, then the **Files** tab under the **Settings** menu controls what they see and how they see it.



14. The **Look & Feel** section controls how files are displayed.

- How many files are displayed by default (**number of entries per page**).
- Files can be sorted (**sort files by**) by alphabetical order, date files were added or modified and popularity.
- Whether or not people can see a list of the latest files that have been added. This is controlled by **recently posted files**. If this is set to 0, recent files are not shown, otherwise the number of recent files displayed is the number set here.
- Likewise whether or not people can see the most popular files is set under **most downloaded files**.
- **Count entries/sub-categories** defines whether a count of the entries is displayed in the menu header.
- **Category columns** defines the number of sub-categories displayed in the drop-down category lists. If this is set to one, then only the top-level categories are displayed. If it is set to 0, none are displayed.



15. **File preview format** controls whether users see how many times the file has been downloaded.

The Email Tab Explained

The **Email** tab under the **Settings** controls who receives administration emails, and how the email is set up.

The screenshot shows the 'Email' configuration page in KBPublisher 3.5. It is divided into three main sections, each marked with a red circle and a number:

- 1. Support Email:** This section allows defining system emails. It includes fields for 'Support Mailer' (KBPMailer), 'From Email / Support Email' (eworin@gmail.com), 'From Name / Support Name' (Support Team), 'No Reply Email' (donoreply@kbpublisher.com), and 'Admin Email' (andrey.shubin@gmail.com). Each field has a corresponding 'Tag' field.
- 2. Email Settings:** This section configures the mail system. It includes 'Mailer' (SMTP), 'Sendmail Path' (/usr/sbin/sendmail), 'SMTP Host' (mail.kbpublisher.com), 'SMTP Secure' (None), 'SMTP Port' (25), 'Use SMTP Auth' (checked), 'SMTP User' (eworin@kbpublisher.com), and 'SMTP Password' (masked).
- 3. Mass Mailer:** This section controls the email limit per hour, set to 250.

Buttons for 'Test / Save' and 'Get Defaults' are located at the bottom of the form.

1. The **Support Email** sections allows you to define system emails.

- **Support mailer** is the special email header
- **From Email/Support Email** is the email address, or addresses, where the administration emails are sent. Feedback emails are sent to this address. You can enter more than one email address. Separate each email address with a comma.
- **From Name/Support Name** is the name the user sees when they receive an email from KBPublisher. For example, if you reply to a feedback question, this is the name that will be shown in the reply field
- The **No Reply Email** is the email address that sends automated information such as subscription alerts, password enquiries and so on
- The person or persons assigned in the **Admin Email** receive system notifications, warning messages and other messages that impact the running of your knowledgebase.

2. The **Email settings** are where you set up the mail system.

- The **mailer** is the system you are using to send the emails. This defaults to the PHP mail() function unless you change it.
- **Sendmail path** defines the location of sendmail files. Sendmail is a UNIX based mail application. You would not normally change this.
- The other items here are specific to the **SMTP** mailer, and should only be filled in if you have specified **SMTP** as the mailer.

3. The **Mass mailer** controls how many emails, such as subscriptions, are sent by the background task scheduling system. This is done to limit the impact to users..

- **Email limit per hour** controls how many emails are sent per hour.

The Lists Tab Explained

The **Lists** tab under the **Settings** menu allows you to:

- Manage article statuses
- Manage file statuses
- Control article types
- Manage user statuses
- Manage feedback subjects
- Manage rating comments statuses

Article and file statuses

KBPublisher has four default article and file statuses: published, pending (approval required), draft and not published.

Use the **Lists** tab to add new statuses and modify existing ones. You control:

- The name of the status
- The color denoting that status
- Description
- Where the status appears in the list of statuses
- Whether the status is active
- Whether or not this status is published (which means users can see it),

Once you add a new status this status appears in the drop-down status lists on the User Privilege screen, so you can control whether or not users have access to the new status.

[Add new article status](#) tells you how to add a new status for an article.

Article types

Article types are used to group records for searching, to provide default template for the articles and to control the display of the type.

[Add new article type](#) explains how to create new article types.

User statuses

KBPublisher has four default user statuses: active, pending (approval required), unconfirmed, and not active.

Use the **Lists** tab to create new user statuses and modify existing ones. You control:

- The name of the status
- The color denoting that status
- Description
- Where the status appears in the list of user statuses
- Whether the status is active.

Feedback subjects

There is an option on the [Ask a Question](#) screen that allows the user to specify a feedback subject from a drop-down list. You define these feedback subjects on the **Lists** tab. You control:

- The title, which is what the user picks from the feedback subject list

- Description
- Who gets the feedback question (i.e. the specified supervisor)
- Color associated with this feedback subject
- Order it appears in the list
- Whether the feedback subject is active.

Rating comment statuses

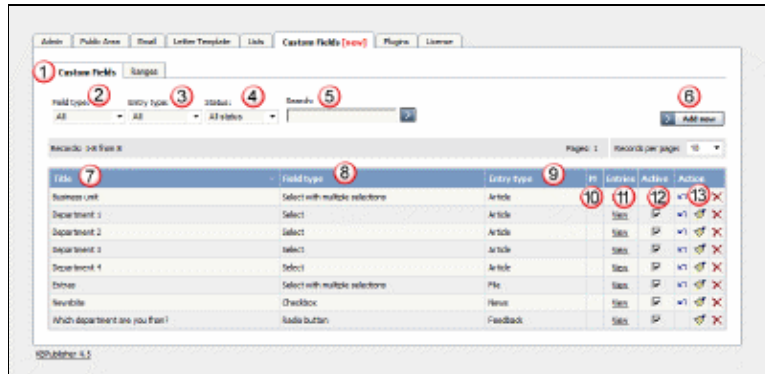
Rating comments have four initially-defined statuses: new, ignore, in progress and processed. You control:

- The name of the status
- The color denoting that status
- Description
- Where the status appears in the list of statuses
- Whether the status is active.

The Custom Fields Tab Explained

This screen allows you to create custom fields, and to place them in your knowledgebase.

The Custom Fields tab



1. The **Custom Fields** tab allows you create and manage the fields and to control which categories or areas they are attached to. The **Ranges** tab allows you to create a set of valid values which you can then assign to one or more custom fields.
2. **Field type** is a filter that allows you to view custom fields for a specified Field types. Select your filter and then click the search/filter button to restrict the list.
3. **Entry type** is another filter. This allows you to view all custom fields associated to articles, or to files, or to news items or to feedback. Use with the search/filter button to show only fields of that type.
4. **Status** is a filter as well. This allows you to view custom fields ...
5. Or you can also search on the name of the custom field by typing the name into the **Search** fields and then clicking the search/filter button.
6. Clicking the **Add New** button allows you to create a new custom field. Note that you can only create the field to go with a specific entry type. Thus If you want to add, say, a *Department* field to both articles and files, then you would need to create two custom fields.
7. The **Title** is the name that the user sees on the screen when they add or read an article
8. The **Field type** denotes the type of field it is. Whether it's a checkbox, or a select box, or even free-flowing text
9. The **Entry type** is which area of the knowledgebase this field is used in. That is, whether it is used in articles, files, news items or feedback.
10. **M** denotes mandatory. When a field is mandatory the author creating the item cannot leave this field blank.
11. If you want to see which articles contain values in the mandatory field, click **View** entries. This takes you to a list of articles that have information in the selected custom field
12. To turn the field on so that it is able to be filled in, ensure that it is **Active**. To hide it, uncheck **Active**.
13. There are three **Action** fields: apply, edit and delete.
 - ◆ **Apply** allows you to set a value for all articles which match field criteria. This is useful when you already have existing items and want to add a value to the old items. Note that it only applies value to items that do not already have an associated custom value, so you don't have to worry about overwriting items you have already set.
 - ◆ **Edit** allows you to edit the custom field. Note that you can also double-click anywhere in the line on the field to edit as well.
 - ◆ **Delete** allows you to delete the field. If you attempt to delete a field that is being

used you will get a warning message telling you the field is being used and you will need to decide if you still wish to delete the field after that.

The Ranges tab



The ranges are the valid values you can select from. For example, you may have a list of departments, or a checkbox that allows you to denote whether extra information is required.

You can also re-use ranges. That list of departments might be a drop-down select box in your FAQ category, and a radio-button select on the feedback form.

14. **Add New** here means add a new set of valid values
15. Click on the **Title** to open the range set and add new values or edit existing ones, including re-order the fields.
16. **Description** is a description of the field range. When a user is adding a custom field, this is the text they see when they click on the inline help
17. **View** takes you to a list of custom fields that contain this range
18. The **Action** field has three options: load, edit and delete.
 - ◆ **Load** takes you to the range, so that you can edit, update or re-sort the individual valid values
 - ◆ **Edit** allows you to rename the range and update the description
 - ◆ **Delete** deletes the range. If the range is being used by custom fields, you will not be able to delete it. Use View to see which fields contain the range.

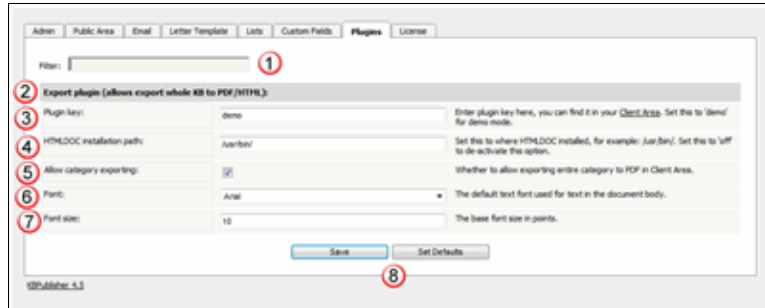
Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

The Plugins tab explained

The Plugins screen explained

This screen allows controls add-on software (plugins) that you can purchase to enhance KBPublisher functionality.



1. The filter field lets you filter on files on this screen. This is a standard field. We use it on all of the Settings screens as some of them are long. Here, you probably won't use the filter field at all, at least not until we have a few more plugins.
2. For release 4.0, the only plugin available is the file export facility, which allows you to create PDF and HTML documents from your articles.
3. Plug-ins are purchased separately to KBPublisher itself. You need a **plugin key** for them to work. You can download this from your Client Area at KBPublisher.
 - If you have a licensed version of KBPublisher, then you must have a valid key for the plugin to work.
 - If you are running the demo version, type **demo** here. We let you try it with the demo to see how the system works. Note that demo documents have a 'trial' watermark on each page.
4. To produce PDFs and HTML pages, you need to install a program called HTMLDOC. The **HTMLDOC installation path** lists where this program is installed. If you're not sure of the format of the path, see [How can I find my full server path?](#)

If you you're not using this plugin, set this to **off**.

5. Set the default text **font** for the text in the document by choosing a font face from the drop-down list.
6. Set the default **font size** by typing the size, in points.
7. **Allow category exporting** allows users to generate PDFs from the Public Area.
8. **Save** obviously saves your changes, while **Set Defaults** restores everything on this screen back to the default values that were shipped with KBPublisher.

This functionality works in version 4.0 only

Search engine friendly URLs

What is a search engine friendly URL?

KBPublisher records are stored in a database. When you wish to read an article, KBPublisher sends a request to the database to get this record for you. This request is usually sent as a query string, and in its native form it looks something like:

`http://yoursitename.com/kb/index.php?view=entry&entryID=90.`

This works well to get the record back, but most search engines, Google excepted, will not index pages with question marks (?) or ampersands (&) in the name.

To get around this, we use a **search engine friendly URL**. This converts the query to something more like:

1. `http://yoursitename.com/kb/entry/90`
2. `http://yoursitename.com/kb/Search-engine-friendly-URLs_90.html`

which contains only characters that search engines recognize, and therefore will the record will be found by the search engine.

Not only that, when sending a link to someone else, it makes a lot more sense, and is a lot less error prone, to send a link `http://yoursitename.com/kb/entry/90` than to send `http://yoursitename.com/kb/index.php?view=entry&entryID=90.`

How do I set up a search engine friendly URL?

- Log onto KBPublisher as an administrator
- Choose the **Settings** menu
- Click on the **Public Area -> Common** tab
- Go to the **Titles / Meta** section and choose an appropriate option from the **Search Engine Friendly URL** drop down list.

You have four options:

- ♦ Automatic uses the default set up when KBPublisher was installed
- ♦ Type 1: `kb/entry/[article_id]` gives the friendly URL -
`http://yoursitename.com/kb/entry/90`
- ♦ Type 2: `kb/entry/[article_title]_[article_id].html` gives the friendly URL -
`http://yoursitename.com/kb/Search-engine-friendly-URLs_90.html`
- ♦ Do not use search engine friendly URL means exactly what it says.
Your link to the article mentioned above would be
`http://yoursitename.com/kb/index.php?view=entry&entryID=90`

Note:

- **"Search Engine Friendly URL"** works on Apache web server with `mod_rewrite` enabled.
- On IIS you can set it up with IIS ModRewrite or similar tools.

Add new status

Articles, files, users, rating comments and feedback comments all have default statuses. For example, there are four default article statuses: *published*, *pending*, *draft* and *not published*.

You don't have to stay with these statuses, you can create your own:

- From the **Settings** menu choose the **Lists** tab
- Click on **Articles** (or Files, or Users, or Rating Comments or Feedback)
- Choose **Add New**

You must include:

- A **title**. This is the status name. e.g. *In review*.

You can also add:

- A description, an explanation of what this status is used for.
- A **color** that is displayed with the status on article summary and list screens.
- Whether or not this status is **published**. If you check this box, then users will be able to read articles of this status. If you do not check this box, then only authors, editors, moderators and administrators can read the article.
- The **order** of this item in the status list. This defaults to *1*, which places the new status at the top of the list.
- Whether or not the status is **active**. If the status is not active, then you will not be able to assign this status to article.

Lastly

- Click **OK** to save your changes.

Add new article type

You can create your own article types:

- From the **Settings** menu choose the **Lists** tab
- Click on **Article Type**
- Choose **Add New**

You must include:

- A **title**. This is the article type name. e.g. *FAQ*.

You can also add:

- A **description**, an explanation of what this article type is used for.
- An **article template**. This is default text and/or formatting that is created for all articles of this type. For example, you might create an article type of system errors. For each article of this type you require three sections: *error number*, *error message* and *anexplanation*, so you create a *System Error* type template with these three headings. When an author creates a new article based on *System Error*, these three headings are automatically included in the article, so all they have to do is fill in the details.
- The **order** this item is in the article type list. This defaults to *1*, which places the new type at the top of the list.
- Whether or not the type is **active**. If the type is not active, then you will not be able to choose this as a type.

Lastly

- Click **OK** to save your changes.

Look and feel

Change the design

Customizing article display options

To change the number of most viewed and recent articles displayed use the **Look and Feel** section under the **Settings** menu, **Public Area -> Articles** tab.

- The number of **recent articles** displayed defaults to five. You can make this more or less, or you can remove recent articles altogether by setting this to 0.
- The number of **most viewed articles** displayed defaults to five. You can make this more or less, or you can remove most viewed articles altogether by setting this to 0.

The information displayed with the article preview is controlled by the **Article preview format** on the same tab. Here you can set:

- How much text to display in the preview
- Whether or not ratings and comments are displayed
- Whether to display how many times the article has been viewed
- Whether to display the date the article was last updated.

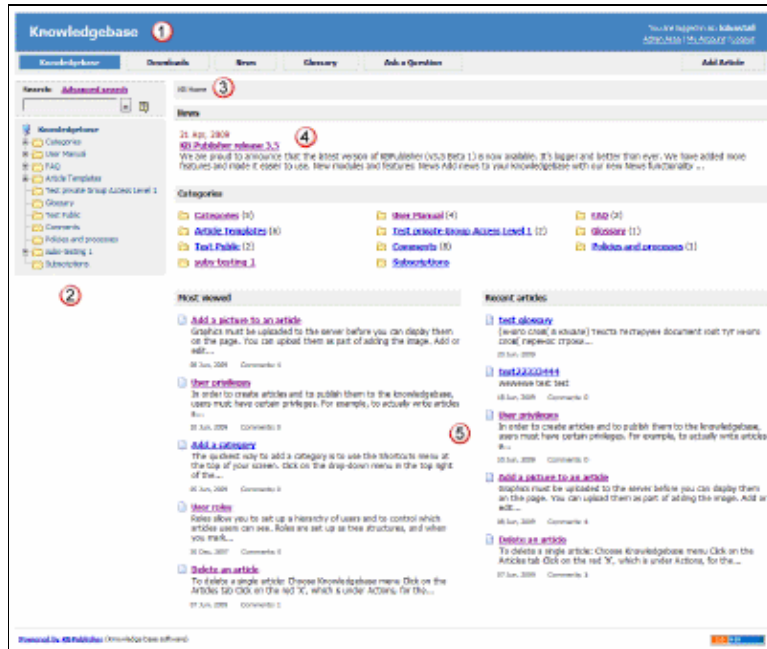
Likewise, the **Detailed article block** controls information displayed when you have opened the article:

- Article/update and author information
- Whether or not the user can print the article
- Whether they can send it to a friend
- How often people view the article.

Customizing Public Area

KBPublisher can be extensively customized and you can get some spectacular results if you want to design your own site.

The default format of the KBPublisher **Public Area** is:



1. The standard header is controlled by the **Header** field.
Settings -> Public Area -> Common -> Header

You can:

- ◆ Include the header by checking the **Header** field
- ◆ Remove the **Header** by un-checking this field

If no header is assigned, a header is controlled by the **Header title** field,
Settings -> Public Area -> Common -> Header title

2. Likewise, the left menu is standard. The menu is controlled by the **View Format** field which is under **Look & Feel**,
Settings -> Public Area -> Common -> View Format

The menu choices are either **Browseable** or **Left Menu**.

3. Directly under the header are menu options and a breadcrumb trail.

The menu options, which are extra links which can be included in the menu, are displayed first. For example, you might want to include a "Home" link if the knowledgebase is part of a larger site.

The menus are controlled by the **Extra links in navigation** field
Settings -> Public Area -> Common -> Extra items in navigation

To include other links:

- ◆ Add the **title** to be displayed on the page followed by a single pipe (|), then add the clickable URL

- ◆ Additional links can be added separated by a double pipe (||)

Example: Home | <http://www.yourhomepage.com> || Support|

<http://www.yourhomepage.com/support.html>

would display the following two links at the top of the page: "Home / Support".

The breadcrumb trail is displayed after any extra links. It reflects the article you are currently viewing in the knowledgebase.

4. The **News** area of this page is optional.

Settings -> Public Area -> Common -> News

- ◆ **Enable News Module** controls whether or not news displays not on the **Public Area** home page

- ◆ **Number of news on index page** sets how many news items are displayed

- ◆ **Display 'News' link in menu** determines whether or not there is a menu option for news

5. This area will be changed depending on "View Format". The main page will display knowledgebase categories, the most recent and the most popular articles.

*Public Area -> Articles -> **Recent articles**, Public Area -> Articles -> **Most viewed articles** and Public Area -> Articles -> **Category columns** settings*

Change KBPublisher Look and Feel (design integration)

The template page

If you want to brand the knowledgebase so that it matches the rest of your website. For example, you can include your company logo and standard buttons on each knowledgebase page.

To create and use custom template:

- Create an HTML page based on this [example](#). Remember that you can add as much as you like around the various html tags, but you must include everything in the example file.
- Upload the newly created page onto your server
- Log on to the knowledgebase
- Go the **Admin** area
- Click on the **Settings** menu and choose the **Public Area -> Common** tab
- In the **Look & feel (format/template/style)** section, change the **Template Page To Load** to the full server path to the template (e.g. `/usr/www/html/ .../your_template.html`).

Notes:

- You must be an administrator to do this
- If you prefer, you can set the **Template Page to load** field to the URL, i.e. `http://www.your_domain.com/your_template.html`, rather than to the full server path, i.e. `/usr/www/html/ .../your_template.html`, if your PHP installation allows it. (On some PHP installations this option is not allowed).
- Using the URL for the template path (`http://www.your_domain.com/your_template.html`) cause extra lookups, which will may affect the performance a litte, hence we recommend that you use the server path name if you can.
- If you need to execute php in your template, use the full URL for the template path.

Changing associated CSS

When you modify KBPublisher to fit your site design, you will probably also need to change some css styles as well.

All cascading style sheets used in KB Publisher are in the `kbp_directory/client/skin/` directory, where `kbp_directory` is the name the directory under which you installed KBPublisher. Most styles for the public area are defined in `kbp_directory/client/skin/common.css`.

You are welcome to change these or to add your own. We do recommend, however, that you create a new style sheet and include a link to the new style sheet in your custom template to overwrite existing KBPublisher styles, rather than change `common.css`.

User settings

Default user settings

User defaults

The knowledgebase administrator sets user defaults when they create the knowledgebase, and can update them at any time.

Security

User setup is part of the security section in the Settings menu:

- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security/Privacy/Registering** section

Here you can:

- Force users to register before they access the knowledgebase
- Determine whether the registration must be approved by a moderator
- Determine whether users must complete a visual confirmation code before their registration is accepted
- Set the default privilege and role new registered users are created with
- Show or hide articles users do not have access to
- Set how long before KBPublisher logs an inactive user out.

Set default user privileges

New users can be created two ways. They can be set up by the knowledgebase administrator, or users can register themselves.

By default, when users register KBPublisher creates them with no privileges. You can change this so that new users are created with a specific default privilege by:

- From the **Settings** menu choose the **Public Area** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Privilege for new registered users** from the drop-down list of privileges
- Click **Save**.

All new users who register after this are created with the new default privilege.

You must have administrator access to change the settings.

Set Default User Roles

New users can be created two ways. They can be set up by the knowledgebase administrator, or users can register themselves.

By default, KBPublisher creates registered users with no designated role. You can change this so that new users are created with a specific role by:

- First, ensure that the role exists. If it doesn't, create it first
- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Role for new registered users** from the drop-down list of roles
- Click **Save**.

All users who register after this are created with the new default role.
You must have administrator access to change the settings.

Force users to log on

To force users to log on to even see the knowledgebase, let alone read articles:

- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security/Privacy/Registering** section
- Check **access for registered users only**.

To force users to log on before they can read specific sections of the knowledgebase:

- From the **Articles** menu choose the **Categories** tab
- Check each category you wish to force users to log on for
- Choose **set private** from **actions with selected** at the bottom of the list of categories
- This brings up privacy options for you to select from. Check **Read** but do not select any roles from the list

To force users to log on before they can read specific articles in the knowledgebase:

- From the **Articles** menu choose the **Articles** tab
- Check each article you wish to force users to log on for
- Choose **set private** from the **actions with selected** at the bottom of the list of articles
- Check **read** but do not select any roles from the list

You can also set **private read** while you are creating or editing the category or article.

What is the difference between forcing a user to register and forcing them to log on?

When you force a user to register (access for registered users only) they must log on to the knowledgebase before they can read articles, whether the articles are marked as private or not.

When a user is not forced to register, they can always access the knowledgebase home page, even if they are not registered. They can read articles that are not marked as private, even if they do not log on. If an article is marked as private, however, then the user must register and log on in order to read that specific article.

Allow Users to Register

To set up your knowledgebase so that users register themselves:

- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security/Privacy/Registering** section
- Check **Allow registration**
- Click **Save** to save the changes.

When a user comes to the site, they will see a **Register** option in the top-right-hand corner of the screen (near **login**). They can click on **Register** and will be presented with a screen of user details to fill in. What happens once they fill in the details on that screen depends on other settings in the Security/Privacy/Registering section.

- If you have specified that the user must provide **visual confirmation** before they can register, the user will also get a code to type in as part of the registration process
- If you checked **approval required for registration** then the registration request is sent to the administrator, who must approve it before the user can log in. If you did not check this option, the user can log in immediately (or at least, as soon as they get the automated confirmation message)
- If you specified a default **privilege** for new users, the user will be set up with that privilege
- If you specified a default **role** for new users, the user will be set up with that role.

Allow users to rate articles

You can set up KBPublisher so that users can rate articles.

- From the **Settings** menu choose the **Public Area -> Common** tab
- Check **allow rate articles**
- If you want the user to add a comment when they give a negative rating, check **Allow Comments**
- Click **Save**.

Even when users can rate articles, the rating does not have to be displayed on screen.

To display ratings on screen:

- From the **Settings** menu choose the **Public Area -> Articles** tab
- Go to the **Article Preview format** section
- Check **display rating**
- Click **Save**.

Allow Users to Post Comments

You can set up KBPublisher so that user comments appear immediately, or so that they must be approved first, or you can turn comment functionality off altogether. You may also identify whether or not only registered users can add comments.

- From the **Settings** menu choose the **Public Area -> Articles** tab
- Go to the **Comments** section
- Specify who can add comments via **allow add comments**
- Specify whether the comments must approved before they appear via the **comment approval policy**
- Specify whether a user must type in a visual confirmation code before they can send the comment via **enable visual confirmation to add comment**
- Click **Save**.

You must have administrator access to change the settings.

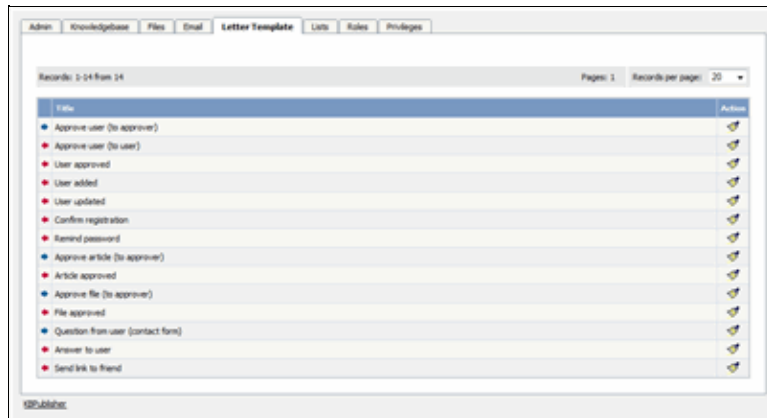
Email settings

Setting up emails and communication

Letter Templates

Preformatted letters

The **letter template** tab is available from the **Settings** menu. It controls the format of emails that are sent and received by the knowledgebase.

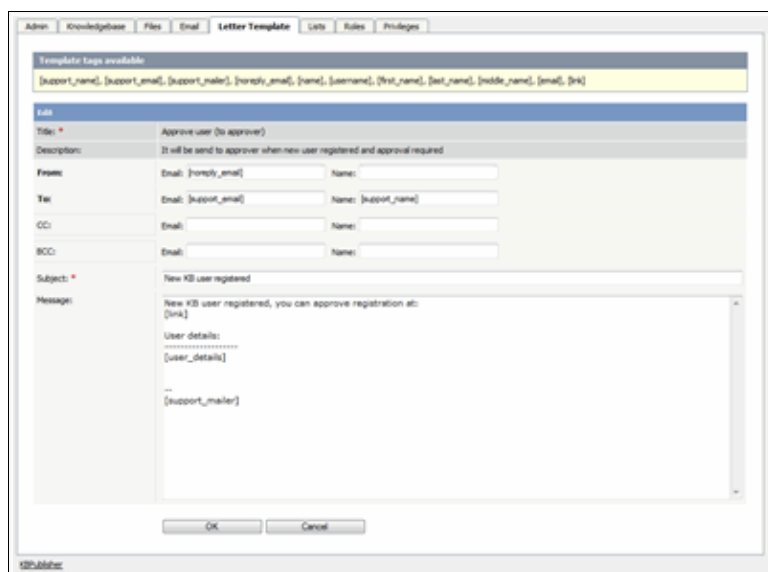


Letters with blue arrows are mails that are received by the knowledgebase administrator. Examples of these include 'ask a question' emails or user registrations. Letters with red arrows are mails that are sent to users. Examples of these include registration confirmation and password reminders.

KBPublisher provides a set number of templates. You cannot add new ones. You can, however, edit existing templates.

Editing letter templates

When you edit a letter template you are presented with an email form that you can modify to suit your own requirements.



You can include any text you wish.

You can include template fields anywhere in the email or in the header:

The actual fields you can include depend on the letter, but some common ones are:

- *[support_name]* -- this is the name defined in the **Support Name** field on the **Email** tab
- *[support_email]* -- this is the email defined in the **Support Email** field on the **Email** tab
- *[support_mailer]* -- this is the name defined in the **Support Mailer** field on the **Email** tab
- *[noreply_email]* -- the standard "Do not reply to this email" from address
- *[name]* -- the name of the user to whom the mail is being sent or who it is from
- *[username]* -- that person's user name
- *[first_name]* -- their first name
- *[last_name]* -- their surname
- *[middle_name]* -- their middle name
- *[email]* -- their email address
- *[link]* -- a link to the page that this email is about.

The field name must be enclosed by square brackets.

Some email templates also have a field called **to Category Supervisor**. This field is shown when the letter relates to a specific article. If you check **to Category Supervisor**, and the category has a assigned supervisor, then the letter is emailed to the supervisor rather than to the Support Mailer address.

Set Who Receives Emails

System emails

You can designate a user, or users, to receive system emails.

- From the **Settings** menu choose the **Email** tab.
- Type the email of the person who is to receive user communications into the **From E-mail / Support E-mail** field. You can input more than one email. Separate each email address with a comma. Everyone specified here will receive system emails.
- Type an appropriate name into the **From Name / Support Name field**. This is the name the user sees in their 'from' field when they receive an email from KBPublisher.
- Add an email address for system-generated messages to users in the **No reply email** field.
- Add the name of the person who will receive notification of all system errors, notifications and warnings to the **Admin Email** field. This field also accepts multiple email addresses. If you use multiple emails, separate each one with a comma.
- Click **Save**.

Category emails

You can also specify a user to receive notifications about articles/files/comments in specific categories. This is used when articles or comments need to be approved.

The 5 letters that can be sent to a category supervisor are:

- Approve article (to approver)
- Approve file (to approver)
- Approve comment (to approver)
- New rating comment
- Scheduled entry

First, you need to assign a person to receive the emails:

- From the **Articles** or **Files** menu choose the **Categories** tab
- **Edit** the category
- Click on the add new **Supervisor** icon
- **Assign** a user from the list of users
- **OK** to save the assignment.

After this, you need to tell the system that the supervisor should receive the emails.

- From the **Settings** menu choose the **Letter Template** tab.
- **Edit** the letter that is to go to the supervisor
- Check **to Category Supervisor**
- **OK** to save.

Feedback supervisor emails

You can also determine who receives the emails when the user requests feedback through the **Ask a Question** tab.

This is controlled by the feedback subjects list.

- From the **Settings** menu choose the **Lists** tab
- Click on **Feedback Subjects**
- **Edit** the subject for which you wish to change the email to be sent
- Click on the add new **Supervisor** icon
- Click on **Assign** for the person you wish to receive emails. You may assign more than one person. Click assign for each.
- Close the assign user pop-up by clicking on the 'X' in the top right corner.

Change text in emails

To change the text in emails sent from, or returned to, KBPublisher:

- From the **Settings** menu choose the **Letter Template** tab
- Choose the email you wish to change
- Click on the edit icon in the **Action** column
- Make the change you require. See [E-mail Letter templates](#) for an explanation of fields.
- Click **Save** to save your changes.

Logs

The Logs menu

Track search queries

To track what searches users have used to find information in the knowledgebase:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Search** tab

Date	Search String	Search In	Returned Rows	Details
1 day ago (11 Feb, 2011 09:04 AM)	components	All Knowledge base	1	3000
1 day ago (11 Feb, 2011 09:03 AM)	all	All Knowledge base	0	3000
1 day ago (11 Feb, 2011 09:03 AM)	providers	All Knowledge base	1	3000
1 day ago (11 Feb, 2011 09:02 AM)	dhsaf	All Knowledge base	1	3000
2 months ago (08 Dec, 2010 12:59 PM)	test	All Knowledge base	2	3000
2 months ago (08 Dec, 2010 06:17 AM)	test	All Knowledge base	2	3000
2 months ago (27 Nov, 2010 02:50 AM)	test	All Knowledge base	2	3000

The information displayed on this screen shows:

- When the search was done
- The string the user typed in
- Categories they searched in
- How many results were returned.

You can filter results on

- Area of knowledgebase
- How recently searches were made
- Whether the search was successful or not
- Or you can search on a specific search string.

Note: You must have administrator privileges to see log details.

This functionality works in version 4.0 only

Track emails

To track what emails have been sent, and whether they succeeded or failed:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Mail Pool** tab

Date Created	Date Executed	Type	Number of Times	Mail Sent	Details
6 hours ago (13 Feb, 2011 12:01 AM)	6 hours ago (13 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	Details
1 week ago (06 Feb, 2011 12:01 AM)	1 week ago (06 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	Details
1 week ago (05 Feb, 2011 02:00 AM)	1 week ago (05 Feb, 2011 02:05 AM)	Comments Subscription	1	Yes	Details
1 week ago (03 Feb, 2011 12:01 AM)	1 week ago (03 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	Details

The information displayed on this screen shows:

- Date and time the mail was created
- Date and time it was sent (or tried to be sent)
- Type of mail it was
- How many times the system tried to send the mail
- Whether or not the send was successful
- The full log details. These are the details summarized on the mail pool tab, plus the contents of the mail that was sent/tried to be sent.

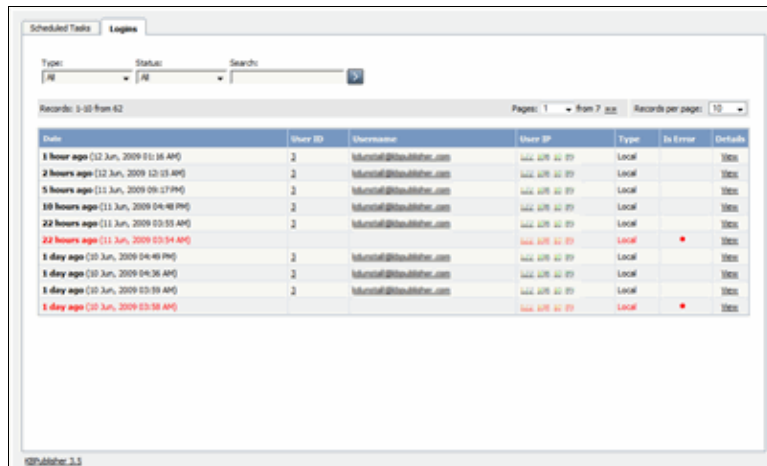
Note: You must have administrator privileges to see mail log details.

This functionality works in version 4.0 only

Track user logins

To track which users have logged in, and any bad logins:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Logins** tab



The screenshot shows a web interface for tracking logins. At the top, there are tabs for 'Scheduled Tasks' and 'Logins'. Below the tabs, there are search filters for 'Type' and 'Status', both set to 'All'. A search box is also present. Below the filters, it indicates 'Records: 1-10 from 42', 'Pages: 1 - from 7 pages', and 'Records per page: 10'. The main content is a table with the following columns: 'Date', 'User ID', 'Username', 'User IP', 'Type', 'Is Error', and 'Details'. The table contains 10 rows of data, with the first row highlighted in blue. The data shows various login attempts, including successful local logins and failed logins.

Date	User ID	Username	User IP	Type	Is Error	Details
1 hour ago (12 Jun, 2009 01:16 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
2 hours ago (12 Jun, 2009 12:03 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
5 hours ago (12 Jun, 2009 09:17 PM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
10 hours ago (11 Jun, 2009 04:48 PM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
22 hours ago (11 Jun, 2009 03:55 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
22 hours ago (11 Jun, 2009 03:14 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local	•	View
1 day ago (10 Jun, 2009 04:49 PM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
1 day ago (10 Jun, 2009 04:36 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
1 day ago (10 Jun, 2009 03:59 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local		View
1 day ago (10 Jun, 2009 03:58 AM)	2	Munro@kbpublisher.com	144.170.12.10	Local	•	View

The information displayed on this screen shows:

- Date and time user last logged in
- User ID and username
- IP address they logged in from
- Type of login. Login types can be 'local', which is a standard login, 'remote', which is when the user logs in using remote authentication, and 'login as other user', which is when someone with access logs in as another user to test changes they have made
- Whether or not the login was successful
- The full log details. If the login was successful, the full log details are pretty that summarized on the logins tab. If the login was not successful, the full log details add extra information about why the login failed.

Note: You must have administrator privileges to see login details.

Remote authentication logins

For remote authentication every last login is logged to a file called *last_remote_login.log* in the KBPublisher cache directory (`$conf['cache_dir']` in file `kb/admin/config.inc.php`).

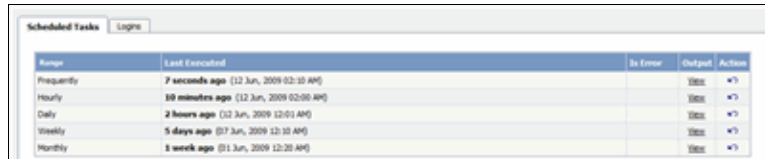
For example: `/home/username/kb_cache/last_remote_login.log`.

This functionality works in version 3.5 and above

Track scheduled tasks

To track whether a scheduled task has happened as expected, what the scheduled task did, and whether there were any errors:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Scheduled Tasks** tab



Range	Last Executed	Is Error	Output	Action
Frequently	7 seconds ago (12 Jun, 2009 02:10 AM)		View	View
Hourly	10 minutes ago (12 Jun, 2009 02:09 AM)		View	View
Daily	2 hours ago (12 Jun, 2009 12:01 AM)		View	View
Weekly	5 days ago (07 Jun, 2009 12:10 AM)		View	View
Monthly	1 week ago (01 Jun, 2009 12:20 AM)		View	View

The information displayed on this screen shows:

- The scheduled task -- frequently, hourly, daily, monthly and weekly -- in the **range** column
- The time it was **last executed**
- Whether or not the task had errored (**is error**)
- A link to the **output** of the most recent scheduled task of this type. Click on **view** to see full details
- A link to all stored logs for tasks of this type (**action**). Click on the curved arrow in the Action column to bring up a full list of logs for this scheduled task.

Note: You must have administrator privileges to see the log details.

This functionality works in version 3.5 and above

Changes for release 3.5

A list of what has changed in release 3.5

News

New news functionality implemented in release 3.5

Add News Item

The quickest way to add a news item to use the **Shortcuts** menu at the top of your screen:

- Click on the drop-down menu in the top right of the screen and choose **Add News** .

Or you can do it via the **News** tab in the Admin Area.

- Click on the **News** menu
- Click on **Add New**.

Once you are on the news screen you must complete the following sections:

- Add a **Date** for your news item
- Add a **Title**. This is the heading displayed on the public screen
- Type your news item in the **Body** editing box
- Specify whether the news item is **Published** or not.

The following items are optional:

- To force users to log on to read the news item, mark it as **Private**
- To publish or change to not published at a future date, **Schedule** it

You can find out more about each of these fields and how they work in [The News Screen Explained](#).

Once your news item is complete:

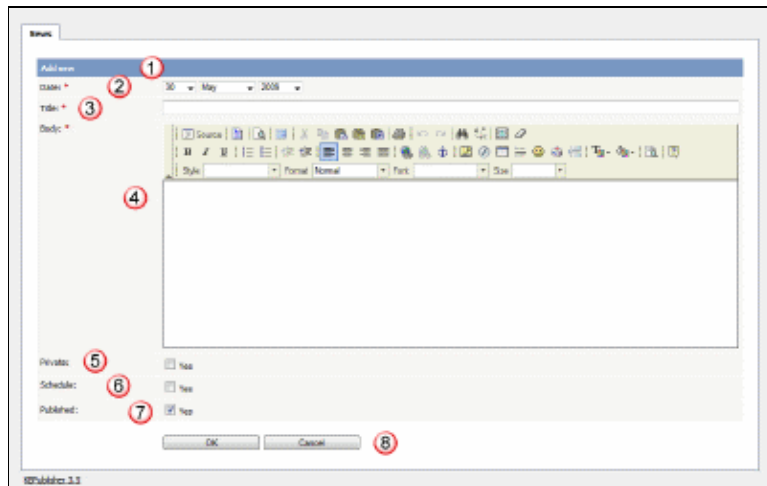
- Click **OK** to save it.

Tips:

- If you leave this page before you click OK, your news item will not be saved.

This functionality works in version 3.5 and above

The News Input Screen Explained



1. The blue line at the top of the screen denotes whether you are adding a new news item or editing an existing one.
2. The **Date** is the news date displayed on the Public area screen.
3. The **Title** is the news heading.
4. **Body** is the news article itself.

Note that on the Public area home page the user only sees the first 200 characters of this. They click on the news heading to open the news item and see the rest..

5. Checking the **Private Read** option allows you to force users to log on to see the news item. Checking **Private Write** allows you to control who can edit the news item. Checking both gives you control over who can read it, whether they have to log on, and who can update it.

Designating that a news item is private brings up a list for you to choose **Access for selected roles only**. This allows you to assign which groups of users (users in which roles) can actually read the news item. Choose **None** if you just wish to make the news private (so they have to log on) but still want everyone to be able to read it. Otherwise, choose the role(s) that can see or update this item.

6. Checking the **Schedule** option allows you to dictate a date and time for when a news item is published and when it drops off the news list.

When you check **Yes** to the Schedule option it brings up a date and time, and allows you to determine whether the news item is to be published or not published at that time. An **And** option allows you to specify a second date/time and status to schedule.

7. Use the **Published** option to specify whether users can read the article or not.

You would often use this in conjunction with scheduling. For example, you may set a news item so it is not (**Published** option not checked) and schedule it to be published on a specific date and time.

8. The **OK** and **Cancel** buttons are standard. **OK** means save the news item, **Cancel** means exit and don't save. **Save as new** means save the news item as a new one. This is effectively a copy.

This functionality works in version 3.5 and above

Edit news item

To edit a news item, including changing the date, changing the text, schedule and whether an article is published or not published and private or not private:

- Choose **News** menu
- Click on the paintbrush, which is under **Actions**, for the item you wish to edit.

You can find out more about each of these fields and how they work in [The News Screen Explained](#).

If you wish to simply change the news item to published or not published:

- Choose **News** menu
- Check or uncheck the **Status** option.

You can also use the bulk update option to set a news item as private/not private and published/not published or to delete it. Using this feature, you can update more than one news item at a time.

This functionality works in version 3.5 and above

Delete news item

To delete a single news item:

- Choose **News** menu
- Click on the **News** tab
- Click on the red '**X**', which is under Actions, for the article you wish to delete.

To delete one or more news items:

- Choose **News** menu
- Click on the **News** tab
- Check the Actions with selected check box to the left of each article you wish to delete
- Choose **Delete** from the **Actions with selected** box at the bottom of the screen
- Click **OK**
- **OK** again to confirm that you really do want to delete these articles.

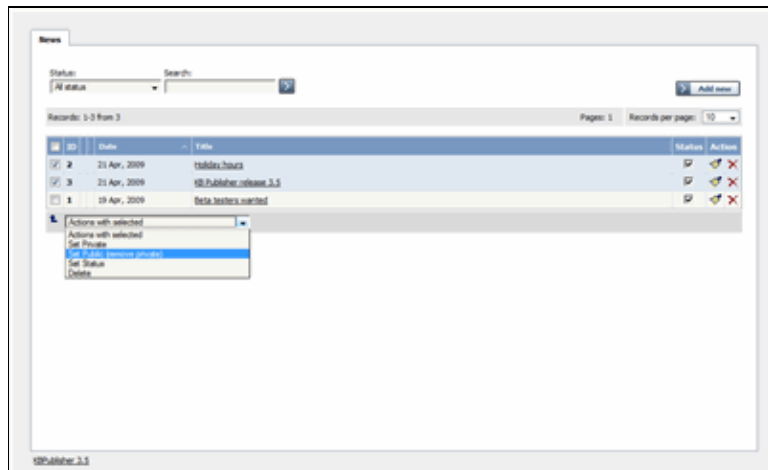
This functionality works in version 3.5 and above

Bulk update news items

KBPublisher allows you to bulk update news items to:

- Publish news items or set them to not published
- Make news items private or public
- Schedule news items
- Set custom fields
- Set news status
- Delete news items

You can do this direct from the **News** menu, **News** tab.



To update the news items:

- Check one or more news items to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

This functionality works in version 3.5 and above

Subscribe to news

To be notified when news items are added to the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Subscribe**

You will be notified daily of changes to news items.

This functionality works in version 3.5 and above

Unsubscribe from news

To no longer receive notifications about updates to the news area of the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Unsubscribe**

This functionality works in version 3.5 and above

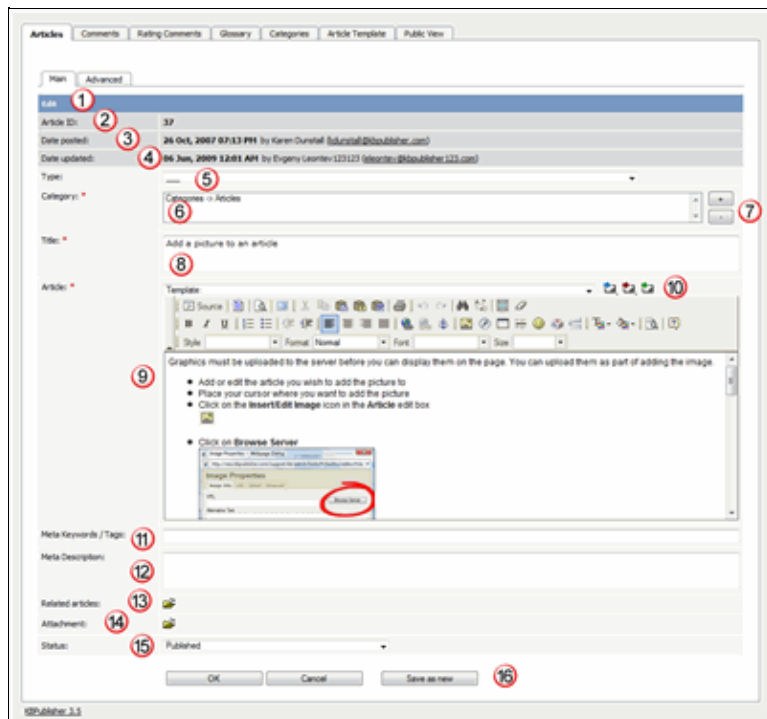
Articles

Changes to articles in release 3.5

The Article Input Screen Explained

The article screen is divided into two tabs. A **Main** tab, which is what you use to create the article, and an **Advanced** tab, where you set external links, the order of the article inside a category and whether or not the article is published. The Advanced tab also allows you to schedule articles for publication.

The Main tab

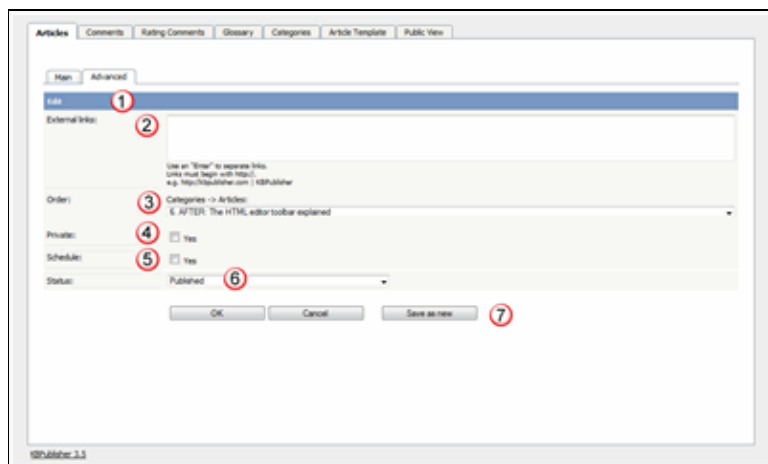


1. The blue line at the top of the screen denotes whether you are adding a new article, or editing an existing one.
2. If this is an existing article, it will have an **Article ID**. This is the record number under which the article is stored in the database. This line also contains a link to public area, so you can see the article as a user sees it, and a link to the history, where you can view prior versions.
3. It will also show the date the original article was created in **Date Posted**, and who created the article
4. The **Date Updated** field shows the last time the article was updated, and who updated it
5. **Type** is has two purposes. It is used to group records for searching and it can also provide a default template for the article. It is not compulsory. If you want to remove a type you have already included, set the Type back to the first item in the drop-down list ().
Articles types can be managed in *Settings->Lists->Article Type*.
6. **Category** controls where the article will be placed in the knowledgebase. It is, effectively, the menu or the table of contents. Note the red '*' to the right of the word 'Category'. This means that this field is compulsory. Note also that some of the categories are red. These categories are private categories. When you select a private

category, KBPublisher lists roles and restrictions beneath the category list so that you know which users can access the article.

7. You add or remove categories by clicking on the + and - buttons
8. **Title** is the heading that goes on the page, and also the link that is displayed under the category (table of contents). It, too, is compulsory.
9. The **Article** is the content that people read. Again, it's compulsory. Type your article into the edit box. Move your mouse over each of the icons in the edit toolbar to see what each one does, or you can read about each function in [edit toolbar explained](#).
10. **Templates** can be inserted into the text by choosing the template from the drop-down list and then clicking on Insert, Replace or Include template. [Using templates in articles](#) describes how templates work and how to use them.
11. **Meta Keywords / Tags** are search words. If you define a keyword here and a user then searches using that keyword, this article is displayed. Use a comma to separate each keyword.
Some external search engines may also use this for search engine optimization.
12. The **Meta Description** is a brief summary of what is on the page. This description is often used by search engines when displaying details of a page.
13. You can easily cross reference other articles in your KBPublisher database by choosing **Related articles**. You can link to text within the article, or you can add a link that is displayed under the heading 'Also read' at the bottom of the page. [How do I add a link to an article](#) explains the process in more detail.
14. You can link to files in your KBPublisher database by choosing **Attachment**. Again, you can add it as a link to text within the article, or you can add the link at the bottom of the page under the heading 'Attached files'. [Attach a file to an article](#) explains this in more detail.
15. Use the **Status** to specify whether this article is published, meaning users can read it, not published, or pending (approval required).
Articles statuses could be managed in *Settings->Lists->Article Status*.
16. The **Revision comments** box is only displayed once you start editing the content of the article. Use this to add comment version history information. When you look at the history, these comments will help you remember what was changed for this version.
17. The **OK** and **Cancel** buttons are standard. **OK** means save the article, **Cancel** means exit but don't save.
Save as new means save the article a new one. This is effectively a copy.

The Advanced tab



1. Again, the blue bar tells you whether you are editing an existing article or creating a new one.

2. You can add links to other web sites by adding them to the **External links** field. Type or paste the address (URL) of the page you want to link into the field. These then appear at the bottom of the article under the heading 'External Links'.

You can append an optional title to each link using a pipe symbol to separate the url and title.

Use an to separate links. Links must begin with http://.

e.g. http://kbpublisher.com | KBPublisher

3. The categories you have selected for the article are listed in the **Order** field, along with a drop-down list of where to place the article within the category. There is one order list for each category you have chosen.
4. Checking the **Private Read** option means that the user must log on to read the article. Checking the **Private Write** option allows you to restrict who can edit the article.

Designated that an article is private brings up a list for you to choose **Access for selected roles only**. This allows you to assign which groups of users (users in which roles) can actually read the article. If you just wish to make the article private but still want everyone to be able to read it, choose **None**.

5. You can **Schedule** articles to be published or not-published at a specified date and time.

Checking the Schedule box brings up date, time and status fields. Fill these in to schedule that the article will change status on that date. You can specify one or two schedule dates. Schedule an item explains this in more detail.

6. You can save your article on the Main tab or on the Advanced tab. The **OK** and **Cancel** buttons are standard. **OK** means save the article, **Cancel** means exit but don't save. **Save as new** means save the article a new one. This is effectively a copy. **Save and continue editing** allows you to save the document but remain on the edit page to make more changes.

Unsubscribe from an article

To unsubscribe direct from the article

- Click on the article to read it
- Click on Unsubscribe in the quick access panel on the right-hand side of the screen

To unsubscribe via the subscriptions list

You can unsubscribe from single files this way, and whole categories

- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Articles** if it's for a single file, or from **Article Categories** if it's for the whole category
- Click **unsubscribe** for the article or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Subscribe to an article

Subscribing to an article means that you receive email notification of any changes to that article.

To subscribe to a single article

- Open the article to read it
- Click on **Subscribe** in the quick access panel on the right-hand side of the screen



The Subscribe option changes to Unsubscribe, and from now on until you unsubscribe you will receive notification whenever this article is edited.

To subscribe to all articles in a category

- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe for Article Categories**
- Click on **Add New**
- Select a category you wish to subscribe to and then click on the **plus (+)** button to the right of the category list. This adds the category to the **Selected Categories** list. Note, there is also an option to select all categories, if you wish
- Click OK to save your subscription.

You can see which articles you have subscribed to in the Subscriptions tab under My Account.

This functionality works in version 3.5 and above

Private Articles

What the Private function does

The private option:

- Lets you force users to log on to read items
- Allows you to restrict who can read items
- Allows you to restrict who can edit or upload items.

It works for articles, files and news items, and can be applied at individual item level and at category level.

Using the Private function

Force users to log on

If you mark an item as **private read** and *do not assign roles*:

- Users must log on to read the item
- Any user who is logged on can read it
- In the Public area users will not see the item until they are logged on
- In the Admin area all users will see the item.

If you mark an item as both **private read** and **private write** and *do not assign any roles*:

- Users must log on to read the item
- Users who are not logged on cannot see the item.

Restrict read access

If you mark an item as **private read** and *do assign roles*:

- Users must log on to read item
- Only users who belong to the nominated role can read the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- All users in the Admin area can see the item.

Restrict write access

If you mark an item as **private write** and *do assign roles*:

- All users can read the item
- Only users who belong to the nominated role can create, edit or update the item
- For articles, users will not see Edit Article and Quick Edit options in the Public view if they do not belong to the correct role

Note that if you mark an item as **private write** and *do not assign roles*:

- All users can see and read the item
- All users logged in to the Admin area with appropriate privileges can edit the item.

Restrict both read and write access

If you mark an item as both **private read** and **private write** and *do assign roles*:

- Users must log on to read the item
- Only users who belong to the nominated role can see or read the item
- Only users who belong to the nominated role can create, edit or post the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- In the Admin area, users who do not belong to the nominated role cannot see the item

Note that private items work in conjunction with privileges. A user who does not have, say, author privileges, will still not be able to create articles even if they are assigned to a role that allows them access via private write.

Set up private read and write

To restrict whole categories:

- Edit the category
- Choose **Private Read** if you wish to restrict who can read the articles in this category or force users to log on to read the articles. Choose **Private Write** if you wish to restrict who can create or edit articles in the category. Choose both if you wish to restrict both reading and writing of articles
- This brings up another option, **Access for selected roles only**
By default, this is set to **None**, which means that users must log on to read articles in this category, but anyone can read them once they have logged on
- Select which roles users must belong to in order to read or write the article
- Click **OK**.

To restrict access to a single article:

- Edit the article
- Click on the **Advanced** tab
- Choose **Private Read** if you wish to restrict who can read the article or wish to force users to log on to read it. Choose **Private Write** if you wish to allow everyone to read the article but only writers in a specified role to edit it. Choose both if you wish to restrict both reading and writing.
- This brings up another option, **Access for selected roles only**
By default, this is set to **None**, which means that the article is private, but all users can read it once they have logged on
- Select which roles users must belong to in order to read/write the article
- Click **OK**.

Files

Changes to the Files area for release 3.5

Subscribe to a file

Subscribing to a file means that you receive email notification of any changes to that file.

To subscribe to a single file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to subscribe to
- Click on **Subscribe** in the file details box



 Cardholder Statement of Disputed Item.PDF	27 Oct, 2008	Filesize: 513 kb	Subscribe	
 apple_advices.txt	My file	28 Nov, 2008	Filesize: 2 kb	Unsubscribe
 testdoc.doc	12 Mar, 2009	Filesize: 27 kb	Subscribe	

The Subscribe option changes to Unsubscribe, and from now until you unsubscribe you will receive notification whenever this file is changed.

To subscribe to all files in a category

- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** for **File Categories**
- Click on **Add New**
- Select a category you wish to subscribe to and then click on the **plus (+)** button to the right of the category list. This adds the category to the **Selected Categories** list. Note, there is also an option to select all categories, if you wish
- Click OK to save your subscription.

You can see which files you have subscribed to in the [Subscriptions](#) tab under My Account.

This functionality works in version 3.5 and above

Unsubscribe from a file

To unsubscribe direct from the file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to unsubscribe from
- Click on **Unsubscribe** in the file details box

To unsubscribe via subscriptions

You can unsubscribe from single files here, or from whole categories

- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Files** if it's for a single file, or from **File Categories** if it's for the whole category
- Click **unsubscribe** for the file or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Feedback

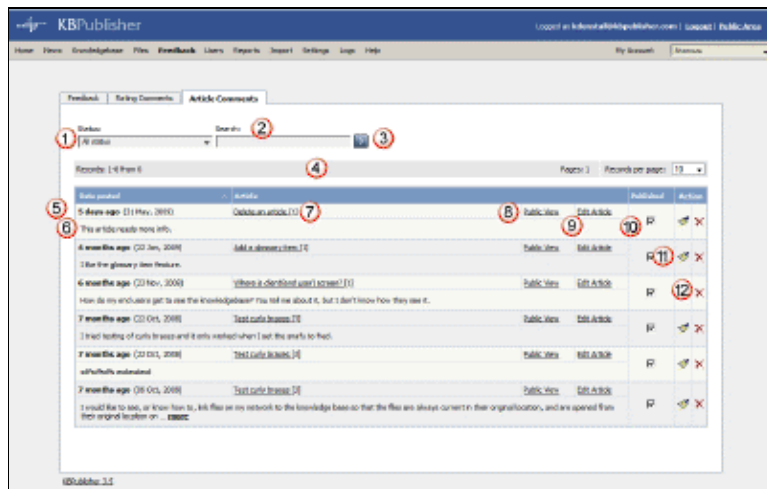
Changes to feedback in release 3.5

The article comments screen explained

The Article Comments screen displays a list of the comments users have added to articles.

To get to this screen:

- Select the **Feedback** menu
- Click on the the **Article Comments** tab.



1. The **Status** drop-down list allows you to filter comments by whether they have been published or are unpublished
2. Use the **Search** field to search for specific text in the comment.
3. Once you have changed the status or typed in a search command, use the Go button to get the results back.
4. The records line contains information about how many comments are displayed here, how many pages there are in the list, and the number of records per page. You can use this to move through the list of comments.

Information shown for each comment includes:

5. The date the comment was posted
6. The first 200 characters of the comment are displayed initially. If there are more than 200 characters, this will be shown by '... more' at the end. You can click on 'more' to display the full comment.
7. The article for which the comment was made is listed in the **Article** column, plus the total number of comments for this article
8. Click on **Public View** to view the article being commented on
9. Or click on **Edit Article** to actually edit the article
10. The status of the comment is shown in the **Published** field. Articles can be published or not published. If this field contains a tick then the item is published.
11. Click on the paintbrush to edit the comment. This includes changing the status.
12. Click on the 'X' to delete a comment.

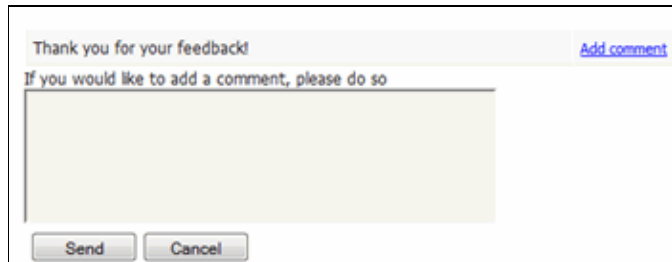
Rating Comments

Users can rate articles to say whether they were helpful or not helpful.

Depending on how you set your knowledgebase up, they can either rate an article as:

- Helpful/Not helpful, or
- Use a star rating system.

When a user rates an article they can also add a comment saying why they rated the article the way they did.



These comments are emailed to the supervisor for that category, or if no supervisor is assigned, to the system administrator.

You can see these rating comments in the Admin area

- Choose the **Feedback** menu
- Select the **Rating Comments** tab

This functionality works in version 3.5 and above

Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0.

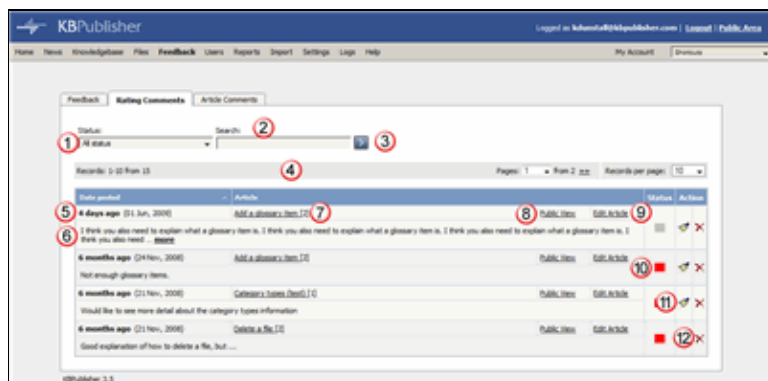
For a complete list of changed/new functionality, please see [version 4.0 release notes](#)

The rating comments screen explained

The Ratings Comments screen displays a list of the comments users have added when they rated an article 'Not helpful'.

To get to this screen:

- Select the **Feedback** menu
- Then click on the **Rating Comments** tab.



1. The **Status** drop-down list allows you to filter the rating comments list by a single status, such as new comments, or those for articles in review.
2. Use the **Search** field to search for specific text in the rating comment.
3. Once you have changed the status or typed in a search command, use the Go button to get the results back.
4. The records line contains information about how many rating comments are displayed, how many pages there are in the list, and the number of records per page. You can use this to move through the list of rating comments.

Information shown for each article includes:

5. The date the article was posted
6. The first 200 characters of the comment are displayed initially. If there are more than 200 characters, this will be shown by '... more' at the end. You can click on 'more' to display the full comment.
7. The article about which the comment was made is listed in the **Article** column, plus the total number of negative rating comments for this article
8. Click on **Public View** to view the article being rated
9. Or click on **Edit Article** to actually edit the article
10. The current status of the comment is shown in the **Status** field as a color. Red denotes a new comment, yellow denotes in progress (the article is being reviewed), blue denotes that the article is currently being updated and grey denotes a comment that you have chosen to ignore. (You can change the statuses and the colors from the **Settings** menu, **Lists** tab.)

If you double-click on the status you open the comment to edit it.

11. Click on the paintbrush to edit the comment. This includes changing the status.
12. Click on the 'X' to delete a rating comment.

This functionality works in version 3.5 and above

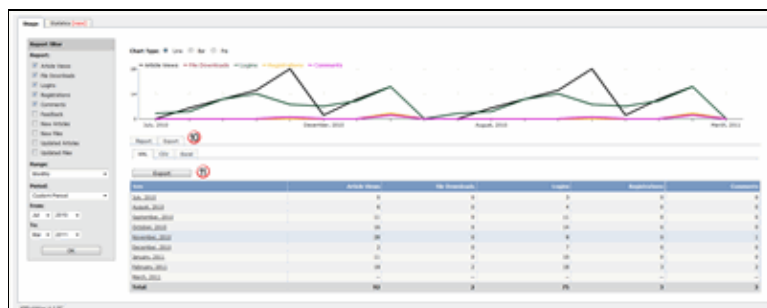
Reports

New reports functionality for release 3.5

The Reports Screen Explained



1. **Report Filter** allows you to choose which statistics you want to report on. Check each item you want statistics for
2. **Range** allows you to determine whether the stats are shown for each day, for a month at a time or for a whole year.
3. **Period** is the time period over which the stats are to be listed for. The options here depend on what you choose in the range. For example, if you choose monthly, then the period options will be this week, previous week, this month or the previous month. You can also select a custom period. If you choose this KBPublisher allows you to choose a From date and a To date.
4. Once you have selected filters, a range and a time period, click the **OK** button to produce the report.
5. The report is displayed as a graph--you can choose line, bar or pie charts
6. And as a table on screen in the **Report** tab.
7. You can click on a **Date** field to break it down even further. For example, in the diagram above, clicking on July 2010 displays the statistics for each day in July.
8. The statistics you requested are displayed as a table.
9. If you wish, you can also **Export** the results.



10. If you click on the **Export** tab, you get the option to export the results in XML, CSV or Excel format.
11. Once you have chosen the appropriate format to export in, click on the **Export** button to export the data. You will be asked if you want to open the file or save it.

Note:

- Report functionality only works when scheduled tasks are turned on
- Data collected is summary data. We do not break down data to individual user level, we collect totals only.

This functionality works in version 3.5 and above

Export Reports

You can export your reports as xml, csv or Excel files.

Generate the report first:

- Click on the **Reports** menu
- Choose the **Usage** tab
- Select the statistics you want to report on from the **Report** options in the **Report Filter** box
- Choose whether you want the stats by day, month or year from the **Range** options
- Choose a reporting period from the **Period** options
- Click OK to **generate** the report.

Then export the generated results:

- Click on the **Export** tab
- Click on the **XML**, **CSV** or **Excel** tab depending on whether you want to export the file as xml, as a comma separated list or direct into Microsoft Excel
- If you choose CSV you will be presented with further options. Select those appropriate
- Click **Export**
- What happens next depends on your browser and your browser settings. In Internet Explorer and Firefox this brings up a message panel asking if you want to open the file or save it. In Google Chrome it saves the file to your download folder and you can click on it to open it.

If you are using Internet Explorer

- Choose **Open** if you wish to open the file now
- Choose **Save** if you wish to save the file. Browse to a suitable directory, then **Save** to save it.

If you are using Firefox

- Choose **Open with** if you wish to open the file now.
The Open With options suggests a default program you might wish to open the exported file in. For example, both CSV and Excel files offer to open the file in Excel for you. If you wish to change the program to open it in click on the specified file type (e.g. Click on Excel) and choose **Other** from the list. Browse to find the program you want the report to open in, select it, and **OK** to return to the message panel
- Choose **Save File** if you wish to save the file. This saves the file to the FireFox download directory (specified in Tools, Options in Firefox) and opens the download panel so that you can open it if you wish

If you are using Google Chrome

- The export command automatically saves the file to the download directory specified in the download directory

This functionality works in version 3.5 and above

Users

Changes to user functionality in release 3.5

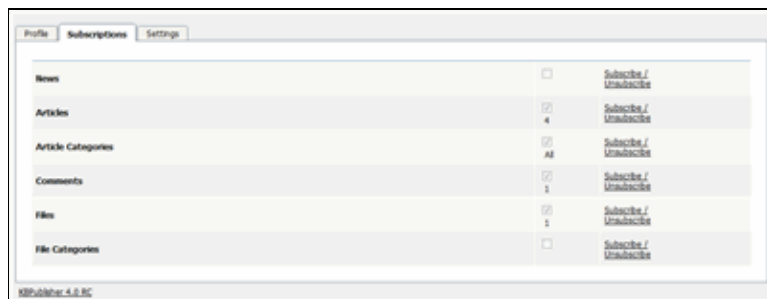
Subscriptions

Subscriptions allow you to be notified when:

- A single article is changed
- Any article in a specified category is changed, or when new articles are added to the category
- A single file is changed
- Any file in a specified category is changed, or when new files are added to the category
- News is added or changed
- A comment has been added to an article or file.

When you set up a subscription for a specified item or category, then KBPublisher sends you an email when that file or category is changed.

You can see what you have subscribed to on the **Subscriptions** tab under **My Account**.



This functionality works in version 3.5 and above

How do I display more articles on a page?

Ten articles are listed on each screen by default, and you have to click more to see the next ten, and so on. The administrator can change this or everyone.

You can also personalize it for yourself, and display 20 or 40 records at a time instead:

- Click on **Admin Area** if you are in the public view
- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen beneath your login details
- Click on the **Settings** tab
- Choose 10, 20 or 40 records from the drop-down list for **Number of records per page**
- Click **Save**.

This functionality works in version 3.5 and above

How do I change my screen width?

The screen width is the width of the box that displays the knowledgebase, including any menus. The width of the display is set up by the administrator but some people have narrower screens and find that they have to keep scrolling to the right to read articles. Or they may have wide screens and want the display to cover more of the screen.

You can personalize the width as follows:

- Click on **Admin Area** if you are in the public view
- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen, underneath your login details
- Click on the **Settings** tab
- Change the **Box Width** to the width you want KBPublisher displayed. You can use a set width, in pixels (px), or use a percentage (e.g. 100%). The default box width is the width that the administrator has set up for the database.
- Click **Save**.

This functionality works in version 3.5 and above

Change the order articles and files are displayed in

By default, articles and files are displayed in ascending date order. That is, the last article or file updated is at the top of the list, and the first one updated is at the bottom.

Sometimes you want to see the list differently. You can order by date added (newest date first), date added (oldest date first), date modified (newest date first), date modified (oldest date first) and in alphabetical order.

- Click on **Admin Area** if you are in the public area
- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen, beneath your login details
- Click on the **Settings** tab
- To change the order that articles are sorted in, choose an appropriate order in **Sort Articles By**
- To change the order that files are sorted in, choose an appropriate order in **Sort Files By**
- Click **Save**.

This functionality works in version 3.5 and above

Scheduling

Schedule an Item

Scheduling an article, news or file allows you to set a date that the item is made visible to users in your knowledgebase and/or a date that it stops being visible.

For example, suppose your company is closed for the Christmas/new year holiday periodâ say it is closed from 12 noon on 24 December and re-opens at 9 am on the 2nd of January.

- You add a news item to say that you will be closed over this period. When you create it (on 18 December, say), you set its status to "Not Published"
- You schedule this news item to change status to "Published" at 12 noon on 24 December, and to change status again to "Not Published" at 9am on 2 January.

Or suppose you have a new software release being implemented. You can create new articles for the new functionality in the software before the release. Give these articles a status of 'Not published', and then schedule them to be published on the assigned release date.

To schedule the item:

- Create or edit the article, file or news
- If you are scheduling an article, click on the **Advanced** tab (you don't need to do this for files or news items)
- Check **Yes** to the **Schedule** option
- This expands the Schedule options

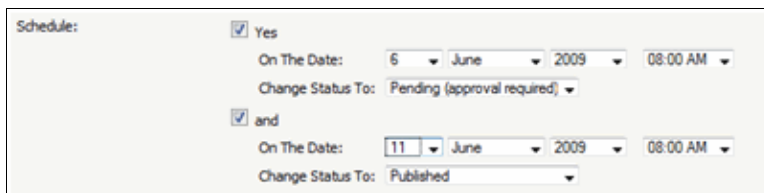


Screenshot of the 'Schedule' form. The 'Schedule:' section has a 'Yes' checkbox checked. Below it, 'On the date:' is set to 9 October 2009 at 08:00 AM. 'Change status to:' is set to 'Not published'. There is a 'Notes:' text area below that.

- Add a date and time to the **On the Date** fields to set the date and time that the item is to change status
- Use the **Change Status To** for determining whether the item is to be published or not published. (Articles have two further statuses, pending and draft.)
- Add a **Note** to explain why this item was scheduled on this date. Use it as a reminder or as a record of what happened.

If you wish, you can set a second date and time to change to another status:

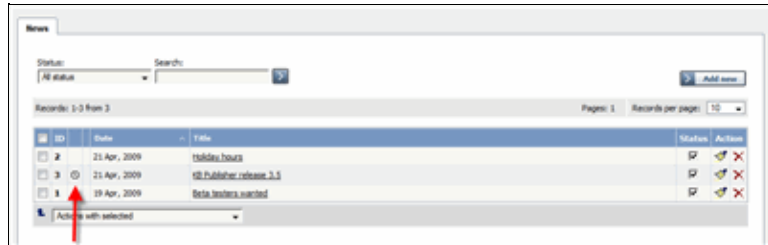
- Check the **And** checkbox
- This brings up a second set of date and status options



Screenshot of the 'Schedule' form. The 'Schedule:' section has 'Yes' and 'and' checkboxes checked. Below 'Yes', 'On The Date:' is set to 6 June 2009 at 08:00 AM and 'Change Status To:' is set to 'Pending (approval required)'. Below 'and', 'On The Date:' is set to 11 June 2009 at 08:00 AM and 'Change Status To:' is set to 'Published'.

- Add a date and time to the second **On the Date** fields to set the date and time that the item is to change status
- Use the second **Change Status To** for assigning the new status
- Add a second note if required.

Items that are scheduled have a small clock next to the article/file/news ID on the list screens.



Tip:

- You can also use bulk actions to schedule or remove schedules.

This functionality works in version 3.5 and above

Remove scheduling

To remove scheduling from an article, file or news:

- Edit the item
- Uncheck the **Schedule** checkbox

You can also use the bulk actions option to remove scheduling from multiple articles or files:

- Select each item to be un-scheduled
- Choose **remove schedule** from the **Actions with selected** options at the bottom of the screen.

This functionality works in version 3.5 and above

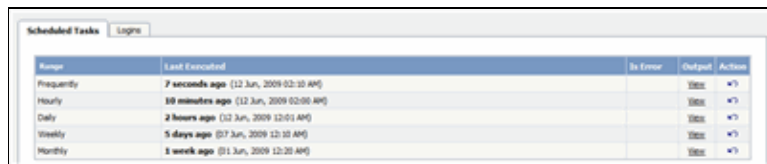
Logs

New feature -- Logs -- for release 3.5

Track scheduled tasks

To track whether a scheduled task has happened as expected, what the scheduled task did, and whether there were any errors:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Scheduled Tasks** tab



Range	Last Executed	Is Error	Output	Action
Frequently	7 seconds ago (12 Jun, 2009 02:10 AM)		View	View
Hourly	10 minutes ago (12 Jun, 2009 02:00 AM)		View	View
Daily	2 hours ago (12 Jun, 2009 12:01 AM)		View	View
Weekly	5 days ago (07 Jun, 2009 12:10 AM)		View	View
Monthly	1 week ago (01 Jun, 2009 12:20 AM)		View	View

The information displayed on this screen shows:

- The scheduled task -- frequently, hourly, daily, monthly and weekly -- in the **range** column
- The time it was **last executed**
- Whether or not the task had errored (**is error**)
- A link to the **output** of the most recent scheduled task of this type. Click on **view** to see full details
- A link to all stored logs for tasks of this type (**action**). Click on the curved arrow in the Action column to bring up a full list of logs for this scheduled task.

Note: You must have administrator privileges to see the log details.

This functionality works in version 3.5 and above

Track user logins

To track which users have logged in, and any bad logins:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Logins** tab

Date	User ID	Username	User IP	Type	In Error	Details
1 hour ago (12 Jun, 2009 01:18 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
2 hours ago (12 Jun, 2009 12:03 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
5 hours ago (11 Jun, 2009 09:17 PM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
10 hours ago (11 Jun, 2009 04:48 PM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
22 hours ago (11 Jun, 2009 03:53 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
22 hours ago (11 Jun, 2009 03:54 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local	★	View
1 day ago (10 Jun, 2009 04:46 PM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
1 day ago (10 Jun, 2009 04:36 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
1 day ago (10 Jun, 2009 03:59 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local		View
1 day ago (10 Jun, 2009 03:58 AM)	2	Munro@kbpublisher.com	144.176.12.99	Local	★	View

The information displayed on this screen shows:

- Date and time user last logged in
- User ID and username
- IP address they logged in from
- Type of login. Login types can be 'local', which is a standard login, 'remote', which is when the user logs in using remote authentication, and 'login as other user', which is when someone with access logs in as another user to test changes they have made
- Whether or not the login was successful
- The full log details. If the login was successful, the full log details are pretty that summarized on the logins tab. If the login was not successful, the full log details add extra information about why the login failed.

Note: You must have administrator privileges to see login details.

Remote authentication logins

For remote authentication every last login is logged to a file called *last_remote_login.log* in the KBPublisher cache directory (`$conf['cache_dir']` in file `kb/admin/config.inc.php`).

For example: `/home/username/kb_cache/last_remote_login.log`.

This functionality works in version 3.5 and above

Changes for release 4.0

New or updated in release 4.0

KBPublisher v4.0 Release Notes

We are proud to announce that the latest version of KBPublisher (v4.0) is now available. We have added some much-requested features and improved existing ones.

New modules and features

Version history

- KBPublisher now keeps a history of all changes you make to the content of an article
- You can view earlier versions and compare them against the current version to see what has changed
- You can roll back to earlier versions

Autosave

- Recovery data for articles can be autosaved, so that if anything goes wrong, you don't lose your work

Comment notifications

- New article comments notification for comment posters and for article subscribers, so that you can now be notified when someone posts a comment on an article

Multiple roles

- Users can now be assigned to multiple roles
- We have made it easier to add users to roles

Export (available as a plugin)

- New export functionality allows you to export all or part of your knowledgebase to PDF or HTML format
- Ideal if you want to create a user manual or place some of your content elsewhere
- Visitors can export articles in the Public Area, or admin can export them in Admin Area for specified roles, allowing them to tailor exports to specific audiences

Import

- You can now import glossary items from an external source

Added support for searching

- Searching in new file types, including Microsoft Office 2007/2010 documents and Open Office documents

Spy directory feature

- You can now automatically add files uploaded to the server to the knowledgebase

- Directories checks daily

Auto Authentication

- Users logging in via remote authentication can now be set up to log in without submitting a login form

Logs and statistics

- Statistics for the knowledgebase, Now you can see which are the most/least viewed articles, how many times a file has been downloaded, which articles users subscribe to, and more
- Usage statistics are now shown as a graph, as well as in a table
- New email subscription log shows what mails are scheduled and sent
- New search log shows what words are used in search queries

Improved items

- Improved usability for assigning roles for to users, entries and categories
- Improved rating system. You can now rate using the 5 stars system, rather than just helpful/not helpful
- Improved rating comments. Comments can now be added for any rating, not just for negative comments
- Improved reports. Chart added to reports
- Added bulk actions for feedback, comments and rating comments
- Added setting to "Send to friend" letter to be able to set from any FROM email address
- Added preview feature when editing article

Fixes

- Fixed issue with local images (http://...) and pdf generation
- Fixed issue with wrong "Use SMTP Auth" settings when saving email settings
- Fixed issue with wrong action/advanced URL in search form when using "by page" navigation

Notes

- Support for PHP 4 has been discontinued in this release. Please consider upgrading to PHP 5.

Upgrading

- Instructions for upgrading your current version can be found [here](#).
- Please do not use option 3 for the upgrade (replacing modified files only).

Installation

Setup tests

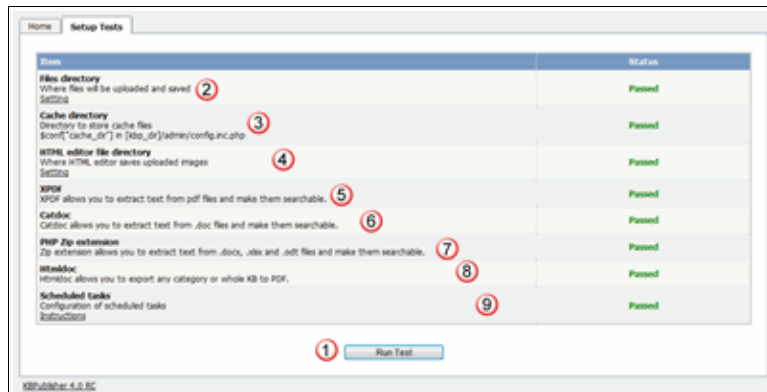
The Setup Tests screen is available as a tab from the home menu. It allows you to check that your knowledgebase has been set up properly.

To get to the screen:

- Log on as an admin user
- Click **Home** menu
- Click on the **Setup Tests** tab

The Setup Tests tab

When you first install KBPublisher the Setup Tests screen doesn't show much. Click on **Run Test** to get some results.



1. **Run Tests.** This is the button that starts it all.
2. The **Files directory** is where files are stored. If this is *passed*, it means that the folder exists and can be written to. If you need to check the name of the directory, click on **Setting**.
3. The **Cache directory** is where cached files are stored. This is defined in the php config file. You normally would not change this. Again, *passed* means that the directory exists.
4. The **HTML editor file directory** is where images are stored. If this is *passed* it means that the directory exists and can be written to. If you need to check or update the name of the directory, click on **Setting**.
5. **XPDF** allows you to search PDF files.
If this setting is *disabled*, then XPDF has not been installed. If this is *failed or error* details of the error will be provided.
If it is *passed*, your knowledgebase should be able to search PDF documents.
To install XPDF, see [Enable Searching in Files](#).
6. **Catdoc** allows you to search Word 2003 files.
If this setting is *disabled*, then Catdoc has not been installed. If this is *failed ir*

error, details of the error will be provided.

If it is *passed*, your knowledgebase should be able to search .doc documents.

To install catdoc, see [Enable Searching in Files](#)

7. **PHP Zip extension** allows you to search Word 2007/2010 files and Excel 2007/2010 files and from OpenOffice documents.

If this setting is *failed or error*, then PHP Zip extension has either not been installed or is not installed properly, details of the error will be provided.

If it is *passed*, then you knowledgebase should be able to search docx, xlsx, and .odt files.

To install Zip extension, see [this link](#)

8. **Htmldoc** allows you to produce user manuals of your knowledgebase. You can purchase this as a plugin.

If this is *disabled*, it means that it hasn't been installed. If this is *failed or error*, details of the error will be provided.

If this is *passed* then you should be able to export your kb to PDF and/or HTML.

See [enable exporting to PDF](#) for setup and requirements.

9. **Scheduled tasks** tells you if your cron jobs are set up properly.

If this is *disabled*, then you will not be able to schedule tasks or run reports and users will not be notified of changes they have subscribed to. Some admin tasks will also not run.

Cron jobs are set up on the server. [Click here](#) for how to set them up.

If this is *error*, then there is a problem in your setup and some tasks could not execute. Information about the problem will be listed with the error.

If this is *passed* then your cron jobs have been set up properly and scheduled tasks should run.

Note:

- This test is also run as a regular scheduled task. If there is an error, the knowledgebase administrator is notified by email.

This functionality works in version 4.0 only

Articles

Changes to articles for release 4.0

Article history

KBPublisher keeps a history of all changes you make to the content of an article. You can view earlier versions and compare them against the current version to see what has changed and you can roll back to earlier versions

By default, version control is turned on, and set to store up to ten revisions.

To turn off version control

- Click on **Settings** menu
- Choose the **Admin** tab
- Set the **maximum number of revisions** to 0

To change the maximum number of versions stored

- Click on **Settings** menu
- Choose the **Admin** tab
- Set the **maximum number of revisions** to the number of versions you want retain.

To recognize if an article has prior versions

- Click on the **Articles** menu
- Choose the **Articles** tab
- Find the article in the list
- You will see a **history icon** under Actions on the articles tab.



- If you move your mouse over the history icon, it will tell you how many versions this article has.

To view earlier versions of an article

- Click on the history icon
- This takes you to the article History screen, where you can view and manage versions.

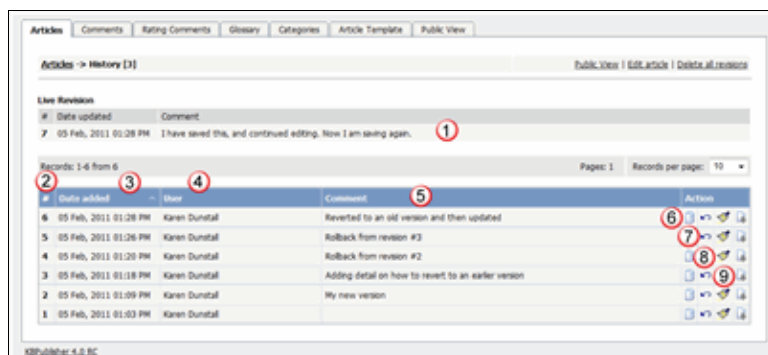
Tip

- Only changes to content are stored. If you modify the category or title, or update metadata, this is not stored in the version history.

This functionality works in version 4.0 only

The article history screen explained

The History screens shows all versions of an article. From here you can compare earlier versions with the current one, revert to earlier versions, delete versions and you can download a copy of a specific version.



1. **Live Revision** shows information about the current version. Version number, date it was last created and any revision comments. When comparing versions, this is the version you compare against.
2. Revision number is a sequentially allocated number. Each time you save the article, this number increments.
3. Date added is the date and time the version was created.
4. And who it was created by.
5. When you create a version you also add a revision comment.
6. **View changes** opens the version and compares it side-by-side against the live version. Changes in each document are highlighted.
7. **Rollback** allows you to revert to a previous version. This then becomes the live version, while the formerly current version becomes another historical version.
8. **Load revision to update** opens the article for editing. When you save the edited article this becomes the new current version.
9. **Download** allows you to save the article (live version and an historical one) to your hard drive and compare it in your favorite compare tool. The file is saved as HTML.
10. **Public view** displays the current live article in the public view.
11. **Edit article** opens the current live article for editing.
12. **Delete all revisions** deletes all historical versions, leaving only the current version.
Note that if you wish to delete an historical version, load the revision to update.

This functionality works in version 4.0 only

Autosave

Articles are saved automatically at intervals.

For example, suppose you are called away from your desk in the middle of creating a new article. You don't expect to be away long, so you don't save. An hour later you come back to your desk to find your session has timed out. All that work lost.

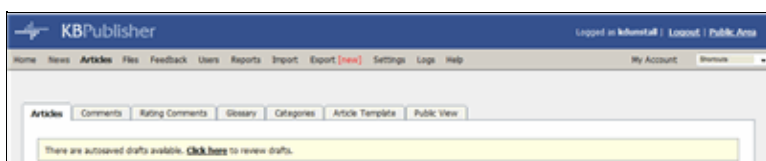
Not quite.

Provided the administrator has turned autosave on, you can get your changes up to the last time the article was autosaved.

If you have not yet saved the article

If you were creating a new article and had not yet saved it, you can see it on the Articles tab

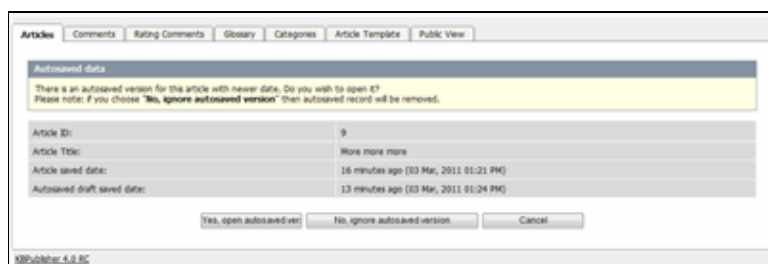
- Log on and go to the **Admin** area
- Click on the **Articles** menu
- Choose the **Articles** tab
- If there are any unsaved autosaved documents you will see a note at the top of the articles tab telling you that there are unsaved drafts.
- Click on the **click here** link to view the autosaved document(s).



- Only the author can see the autosaved document

If you are editing an existing article

If you open an existing article for editing and for some reason the article was not saved correctly, or an error occurs on the save, then when you next open the article for editing you will see the following message:



- If you want to use the auto-saved version, click on **Yes, open autosaved version**.
- If you want to revert back to the old version, click on **No, ignore autosaved version**, which opens the version without your edits
- When you **Save** the article this new version becomes the current version and the autosave history is deleted.

Import glossary

If you already have a list of terms and definitions that you would like to use in your knowledgebase, you can upload these terms in bulk.

The process is:

- Create a file of glossary items to import
- Upload a test sample to the system
- Import.

Create a file of glossary items to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of a **phrase**, followed by a **definition**.

- Both fields *must* be included, and they must be in the order of glossary item name (phrase) first, and then the text that explains it
- Place the data for each glossary item onto a single line, and separate each field by a comma. Include a space after the comma. If you choose to use something else other than a comma, update the **field terminated by** field under CSV options to match.

Field	Type/size	M/O	Comments
phrase	varchar(100)	M	The maximum size of a phrase is 100 characters
definition	text	M	
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
Highlight once	tinyint(1)	O	Defaults to 0.

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported glossary items and try again. Create a test file and run that first.

- Copy, say, the first three lines of your text import to a separate file
- Either:
 - ◆ Save the file to a local drive (e.g. somewhere on your c: drive)
 - ◆ Upload the file to the server

Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import menu**
- Click on the **Import Glossary** tab
- If the import file is on your c: drive (or another local drive),
 - ◆ Choose **Load Data Local File** in the **SQL Load Command** field
 - ◆ **Browse** for the **CSV file** on your drive and load it
- If the import file is on the server,
 - ◆ Choose **Load data file**
 - ◆ Type the address where the file is located into the **Path to file** field on **CSV file** line
- Change **CSV options** if required.
- Click **Load**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

Fix any problems

All going well, you should now have three new glossary items in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file.

You are now ready to import the rest of the glossary.

Import articles

Import the rest of the glossary using the same process as for the test file, only this time using the real data file.

Note:

- If the glossary item already exists, a new item will still be uploaded. We recommend you do not duplicate.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.

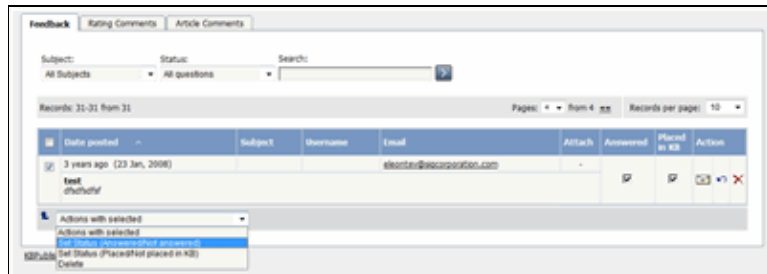
This functionality works in version 4.0 only

Bulk update comments, rating comments and feedback

KBPublisher allows you to bulk update feedback, comments and rating comments to:

- Set a status
- Delete

You can do this direct from the **Feedback** menu, and choose the appropriate tab.



To set the status of a comment or a rating comment:

- Click on the appropriate tab
- Check one or more comment to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.
For example if your privilege does not allow you to delete comments then there is no 'Delete' action in the list of options.

Remote Authentication

Using Auto Authentication

Auto authentication allows you to automatically authenticate users.

Steps to enable Auto Authentication

- Set the constant **KB_AUTH_AUTO** in the file *admin/lib/custom/remote_auth.php* to **1**
- Customize the **_remoteAutoAuth** function in the file *admin/lib/custom/remote_auth.php* to catch current user data and return it
- Rename the function **_remoteAutoAuth** to **remoteAutoAuth**

Customizing the remoteAutoAuth function

In your installation there is a folder *admin/lib/custom*. Within that folder is a file called *remote_auth.php*. This file contains the *_remoteAutoAuth* function. Customize this function to get the current user's credentials.

On success, the function **remoteAutoAuth** should return an associative array with keys (username, password) for the user. For example: `array('username'=>'John', 'password'=>'Test')`.

Here is a simple example of the function customized using HTTP authentication:

```
function remoteAutoAuth() {  
    $user = false;  
  
    if(isset($_SERVER['PHP_AUTH_USER']) && isset($_SERVER['PHP_AUTH_PW'])) {  
        $user = array();  
        $user['username'] = $_SERVER['PHP_AUTH_USER'];  
        $user['password'] = $_SERVER['PHP_AUTH_PW'];  
    }  
  
    return $user;  
}
```

Debugging auto-remote authentication

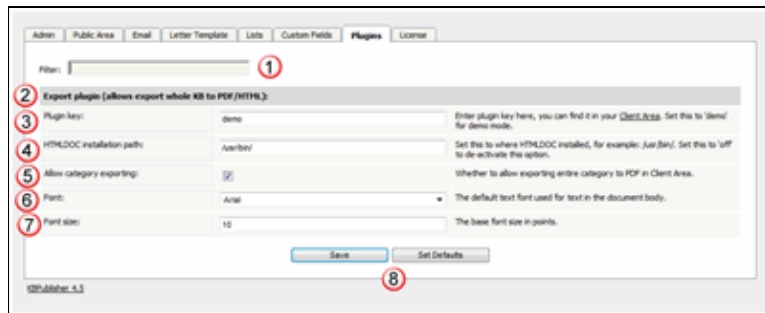
You can debug auto-authentication by setting **KB_AUTH_AUTO** = 2, which allows you to continually try relogging in so that you can fix any problems without having to start over every time. **Important:** Don't forget to reset this back to 1 (or 0) when you have finished debugging.

Exporting

The Plugins tab explained

The Plugins screen explained

This screen allows controls add-on software (plugins) that you can purchase to enhance KBPublisher functionality.



1. The filter field lets you filter on files on this screen. This is a standard field. We use it on all of the Settings screens as some of them are long. Here, you probably won't use the filter field at all, at least not until we have a few more plugins.
2. For release 4.0, the only plugin available is the file export facility, which allows you to create PDF and HTML documents from your articles.
3. Plug-ins are purchased separately to KBPublisher itself. You need a **plugin key** for them to work. You can download this from your Client Area at KBPublisher.
 - If you have a licensed version of KBPublisher, then you must have a valid key for the plugin to work.
 - If you are running the demo version, type **demo** here. We let you try it with the demo to see how the system works. Note that demo documents have a 'trial' watermark on each page.
4. To produce PDFs and HTML pages, you need to install a program called HTMLDOC. The **HTMLDOC installation path** lists where this program is installed. If you're not sure of the format of the path, see [How can I find my full server path?](#)

If you're not using this plugin, set this to **off**.
5. Set the default text **font** for the text in the document by choosing a font face from the drop-down list.
6. Set the default **font size** by typing the size, in points.
7. **Allow category exporting** allows users to generate PDFs from the Public Area.
8. **Save** obviously saves your changes, while **Set Defaults** restores everything on this screen back to the default values that were shipped with KBPublisher.

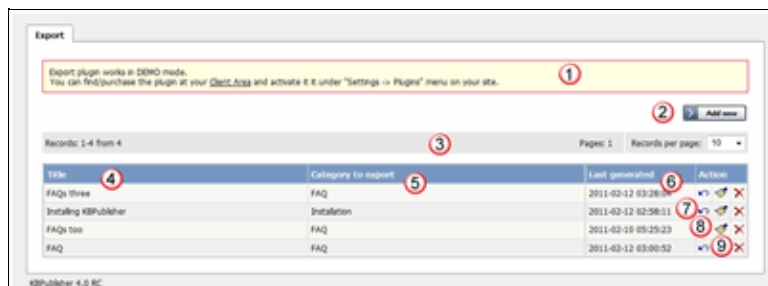
This functionality works in version 4.0 only

The Export Screen Explained

The export screen allows you to export your knowledgebase articles to html pages or PDF files.

The Summary screen

When you first enter the screen you see a summary of any current exports that have been set up.



1. Export functionality is provided as a plug-in and is purchased separately. If you have not purchased the plug-in you will get a message telling you that the plug-in works in demo mode--with some restrictions--but otherwise doesn't work.
2. **Add New** allows you to set up a new export
3. The records information line contains the usual information, like how many records there are, and how many pages of records there are
4. **Title** is the name of the export
5. **Category to export** is the top-level category that will be exported. Any sub-categories will be exported as well
6. **Last generated** shows the last time you generated documentation to export
7. The **Details** action allows you to view details of the specific export
8. The **Update** action allows you to update the export
9. The **Delete** action allows you to delete the specific export.

When you click on Add New, you are taken to the **Add New Export** screen.

The Add New Export screen

[Click here to see a full size view of the image](http://www.kbpublisher.com/images/image/manual/Export/ExportScreen_New_withNumbers_small.png)

1. Again, if you have not purchased the plug-in, you will get the message at the top of the screen.

Export options

The export options define what data you are actually going to export.

2. **Title** is the name you are giving to this particular export.
3. The **description** is displayed on the Export Details screen. Use it for information about how and why this particular document template was set up.
4. **Category to export**. You can only export one category at a time but, but all sub-categories are exported as well.
Click on the + to the right of the Category to export field to select the category.

5. **Export for user** controls which articles are exported. That is, the audience for the published document.

To export all articles in the category and in any sub-categories, irrespective of roles or privileges, choose **Admin user**. You might use this for internal documents, or even for proofing.

To export only those articles that the user sees in the Public view, without logging on, select **Not logged user**

To export articles that a user in a specified role will see, select **Logged user**. If you select this option, you also need to assign a role.

6. The **with role** field is only displayed if you if you choose to export for a logged user. Click on the + to the right of the with role box to select the role. Again, you can only select one role.
7. If you need help filling out a specific field, click on the ? for that field.

Document options

The rest of the screen is devoted to how the output is produced.

8. The **Title** is the title of the document. If you are creating a PDF this will be the front page. If you are creating an HTML page this is the name on the browser tab.
9. Check **Add to header** if you want your title on every page of your PDF.
10. The **title image** is the image that goes on the front page of your PDF document. We recommend that this image be no larger than 500x500 pixels.

These images must be in the HTML settings folder on the server. To upload an image from you local drive, click on the folder icon next to the Title image field. Once the image is on the server, select it, and **attach**. Then close the image load browser to return to the Export screen.

11. When you check the **PDF** button extra fields are displayed for you to complete. These fields are specific to the PDF output.
12. **Orientation** allows you to set the page as portrait or landscape.
13. If you intend to print the document on a double-sided printer, select **two sided**. This gives mirror-image page headings.
14. If you want your document to have a logo in header, add a **logo image**.

To add the logo, click on the folder icon next to the Title image field. Again, you can browse and upload it from a local drive if you wish.

Once the image is on the server, select it, and **attach**. Then close the image load browser to return to the Export screen.

We recommend that the logo image be no larger than 200 pixels wide by 100 pixels high.

15. You can also password protect your document by adding a **password**
16. If you choose **HTML (one page)** your document is produced as one big HTML document.
17. If you choose **HTML (many pages)** each article gets its own HTML page.
18. Click **Save** to save the template without generating the document.
19. Click **Save and Generate** to create documents as well as saving the template.

To actually view the generated document you need to go back to the Export screen and click on the template you have saved.

Enable Exporting to PDF

To export multiple articles to PDF or HTML files you need to:

- Install a program called **HTMLDOC**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your HTMLDOC directory. (Check your `open_basedir` PHP setting in `php.ini`)
- Ensure that PHP can run the `proc_open` function. (Check your `disable_functions`, `safe_mode_exec_dir` PHP settings in `php.ini`)
- **Buy** the export **plugin** or try it in **Demo mode**
- Add the plugin key to your KBPublisher settings

Install HTMLDOC

Note: At this time there is no commercial support for the HTMLDOC. The windows binaries can be found [here](#).

- HTMLDOC is available from <http://www.htmldoc.org>
- Download it and install it

Update the setting to point to HTMLDOC

Once you have installed HTMLDOC, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Plugins -> HTMLDOC installation path**
- Make sure the **HTMLDOC installation path** points to the directory where you installed HTMLDOC. For example: `/usr/local/bin/`.
- When you click "Save", test HTML file will be parsed and error occurs if it failed.

Buy the plugin

Export functionality is not available with the default KBPublisher package. You must purchase it separately.

Please see [this article](#) how to buy the plugin.

Add the plugin key to KBPublisher

You should have received an email with you plug-in key. If you can't find the email, you can also get this from the **My Licenses** tab in your [client area](#) on the KBPublisher website.

- Copy the license key from your client area or the email
- Log on to your knowledgebase
- Go to the **Admin Area**
- Click on the **Settings** menu
- Click on the **Plugins** tab
- Paste your key into the **Plugin key** field
- **Save**.

Test HTMLDOC from command line

To convert a single web page type:

```
$ /path_to_htmldoc/htmldoc --webpage -f output.pdf filename.html
```

Test using PHP and included test file:

```
$ cd /path/to/kbp_directory
$ php -r "system('/ path_to_htmldoc/htmldoc --webpage -f output.pdf
admin/extra/plugin/export/template/export_test.html');"
```

Tip:

- If you want to try the export plugin before you buy, use demo mode to get an idea of how it works.

This functionality works in version 4.0 only

Export Articles

What does export articles do?

Our export functionality allows you to export all or part of your knowledgebase to a PDF or to HTML files. This is ideal if you want to create a user manual or place some of your content elsewhere.

You can export the whole knowledgebase or a single category and sub-categories, and you can use roles to tailor the articles for a specific audience.

Producing an exported document is a two-part process. First, you create an export template by defining what articles you want included and the document format. Then you generate the file. The two-part process allows you to set up the document once and regenerate any time you want to include updated content.

To create a new export template

To export:

- Click on the **Export** menu
- Choose **Add New**.

This takes you to the [Export](#) screen where you choose the following **export options**:

- Provide a **title** for the export.
- We recommend that you add a **description**. Once you have a number of exports set up this will help to identify them.
- Select a **category to export**. You can only select one category. Sub-categories will be exported as well.
If you wish to select the whole knowledgebase, select the topmost parent category. To select a category, click on the **+** to the right of the category to export field, double-click on the category to move it down to the assigned category box, and OK.
- Choose which user type to export for in **export for user**.
To export all articles in the category and in any sub-categories, irrespective of roles or privileges, choose **Admin user**.
To export only those articles that the user sees in the Public view without logging on, select **Not logged user**.
To export articles that only users in a specific role will see, select **Logged user**. If you select this option, you also need to specify a **role** as well.

If you are creating a PDF

- Add a **title**. This is displayed on the title page of the document.
- If you want the title to be displayed on the header of each page, check **Add to header**.
- If you want an image on the title page, click on the folder to the right of **Title image**. This takes you to the load image page.
If you need to, load the image from your local drive by clicking **Add New** and browsing for the file to upload it. Once your image is in the list, click **Attach**, and then close the load image popup.
- Check the **PDF** option. This opens up some new fields specific to PDF documents.
- Use the **orientation** to choose whether the document is to be in portrait or landscape mode. Default is portrait mode.
- If you intend to print the document double-sided, check **two sided**. This sets up left and right pages.

- To add a logo to the header on each page, click on the folder to the right of **logo image** and select your logo from the list. Again, if the logo you want is not in the list, you can upload it from a local drive. Once you have selected the logo, **Attach** it and close the load image popup to return to the Export screen.
- If you wish to password protect the PDF document, add a **password**.


If you are creating an HTML page or pages.

- Add a **title**. This is displayed as the tab name on html documents.
- If you want an image to be added to the title page (index.html), click on the folder to the right of **Title image**. This takes you to the load image page.
- If you want each article as a separate HTML file, check **HTML (many files)**. If you everything in a single html file, check **HTML (one file)**.

Save your settings.

- Click **Save and Generate** to save your template setup. You can reuse this setup as often as you like to generate new documents for these settings. At the same time a first copy of the document is generated.
- This returns you to the Export screen with the new export template listed

Generate the file

- Click on the **Details** action icon ()
- This takes you to the Export Details screen. In the download section is the name of the type of file, or files, that you asked to be generated.
- Click on the document type--PDF, HTML (one file) or HTML (many files)--depending on which you generated, to open it.
- Choose **open** if you want to view the file immediately.
- Choose **save** if you want to download the file to your local drive.

Tip:

- You are not limited to saving in one particular format. You can check all three options if you wish.
- If you just want to set up the export rather than generate it right now, click Save rather than Save and Generate when you have completed all the fields. This sets up the export file but doesn't generate it.
- HTML files are zipped.

This functionality works in version 4.0 only

Generate PDF or HTML file from export template

This article assumes that you have already created your export template and saved it. If you have not done this, see [Export Articles](#) instead.

To generate a document from a previously saved export file

Once you have saved an export template, you can regenerate a document any time. The new export takes the latest copy of each article from your knowledgebase

- Click on the **Export** menu
- The export templates you have created are listed.
- Select the one you want to generate new documentation for by clicking on the **Details** (↺) action icon.
- This opens the Export Detail screen with information about the template displayed. In the download section there will be one, two or three of: PDF, HTML (one file) and HTML (many files), depending on how many different formats you chose when setting up the export template.
- Click on **Generate** next to the format you want produce a document for. This creates a document, or documents, from the current knowledgebase. If this is the second or subsequent time you have generated a file, the generate date changes to the current date and time.
- Click on the file type--**PDF**, **HTML (one file)** or **HTML (many files)**--for the newly generated document.
- Choose **Open** if you want to view the generated file(s) now.
- Choose **Save** if you want to save the generated file(s) locally.

This functionality works in version 4.0 only

Export Articles from the Public Area

If you have purchased the export plugin, then you can set your knowledgebase up so that users can export a whole category of articles as a PDF document, or print it, from the **Public Area**.

To allow public export of articles

- Purchase the [export plugin](#) and install it
- On the **Settings** menu choose the **Plugins** tab
- Check **allow category exporting**.

To generate a PDF file or print a category from the Public Area

- Once allow category exporting is set, users will find an Options button on their screen when they view a category



- Click on the **Options** button
- This opens a new options panel which allows a user to:
 - ◆ Search for items specifically within the category they are looking at
 - ◆ Create a PDF document
 - ◆ Create a printable html page. This contains basic text without all the headings and left menu and right information block.
- The information covers all articles in the category. The user can then print or save this as required.

This functionality works in version 4.0 only

Files

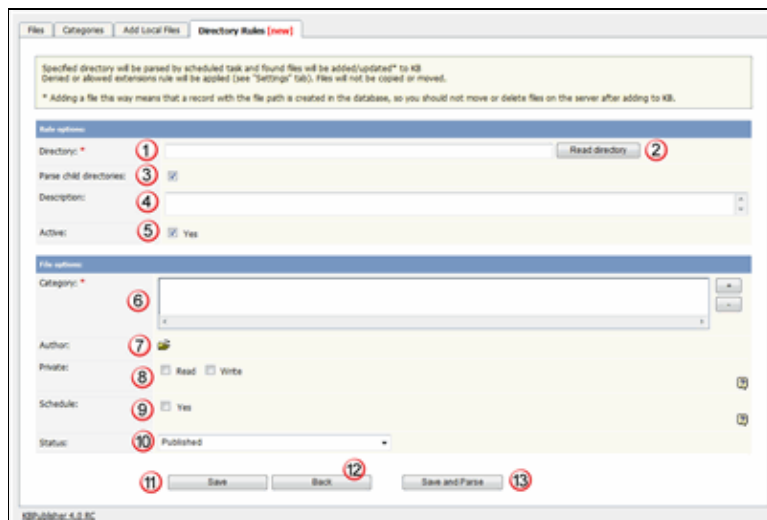
What's new in files for release 4.0

Automatically Add Local Files

The Directory Rules screen allows you to set up the knowledgebase so that KBPublisher automatically checks the specified directory on the server every day and adds links to any new files to KBPublisher.

Standard allowed and denied extension rules apply, based on your denied and allowed extensions set in the [Files Settings](#) tab.

Note that it doesn't actually move files, it just adds links, so once they have been added to KBPublisher if you move them from the specified folder you will end up with broken links.



Rule options

1. The **Directory** is the folder on the server where the files are to be uploaded from. Directory name should be the full server path.
2. To check that the directory exists, click **Read Directory**. If your directory is set up properly, this will bring up a list of files in the directory ready to be uploaded.
3. If you wish to upload anything from child directories as well, check **Parse child directories**
4. A **description** is not compulsory, but it's good practice to add one so that later on, when viewing, you know why files in this directory are being picked up.
5. Check **Yes** for **Active** to start automatically uploading the files from the next scheduled time. If you want to stop the automatic upload temporarily, uncheck this box and the upload will stop until you turn it back on.

File options

6. When the files are uploaded they will be placed in the **category** you assign here.
7. To choose an **author** against whose name the files will be uploaded click on the folder icon and **Assign** from the pop-up list of registered users that comes up.
8. As with any file, you can force users to log on and control who can update the uploaded files by setting **private read and write**

9. By default, files are set to a default **status** of **published**, but you can change this to whatever status wish.
10. You can **schedule** the uploaded files to change status on a specified date. Schedule an item explains how scheduling functionality works
11. **OK** saves your automatic upload.
12. **Back** cancels it
13. **Save and parse** saves the rule and executes it now.

This functionality works in version 4.0 only

Reports

What's new in reports for release 4.0

Statistics

The statistics screen allows you to see

- What are the most viewed articles
- The articles with the highest rating
- The articles with the lowest ratings
- The articles with the most comments
- The most downloaded files
- The most popular search terms used, and the least popular
- Plus general statistics about articles, files, news, feedback and users.

You can export the results as xml or csv files for use elsewhere.

The screenshot shows the 'Statistics' tab in the KPublisher 4.3 interface. It contains several data tables:

- All articles:** All articles (171), All categories (48), All glossary (44).
- Articles by status:** Published (158), Pending (approval required) (0), Draft (6), Not published (7), Total (171).
- Articles by private status:** Public (167), Private Read (0), Private Write (0), Private Read/Write (4), Total (171).
- Categories by status:** Published (48), Not published (0), Total (48).
- Categories by private status:** Public (26), Private Read (0), Private Write (22), Private Read/Write (0), Total (48).
- Most viewed articles:** Table with columns ID, Title, #. Top entries include 'Add a picture to an article' (162), 'User privileges' (89), 'Add a category' (81), 'Article workflow' (70), 'System Requirements' (65), 'User roles' (64), 'Add a glossary item' (61), 'Category types (test)' (60), 'What is KPublisher?' (59), 'Delete an article' (59).
- Articles with high rating:** Table with columns ID, Title, #. Top entries include 'test2223444' (30.0), 'ar1265' (30.0), 'Create new user role' (30.0), 'The privilege screen explained' (30.0), 'Create new user privilege' (30.0), 'User feedback' (30.0), 'Install KPublisher' (30.0), 'queue' (30.0), 'Add a user' (8.0), 'queue' (7.0).
- Articles with low rating:** Table with columns ID, Title, #. Top entries include 'Import users' (0.5), 'Delete a file' (1.0), 'What might use KPublisher?' (1.0), 'asdad' (1.0), 'Delete 2' (1.0), 'Bulk update articles' (1.0), 'Add an article as a result of user feedback' (1.0), 'Attach a file to an article (attachment)' (1.0), 'What is KPublisher?' (1.0), 'Test curly braces' (1.0).
- Most commented articles:** Table with columns ID, Title, #. Top entries include 'Add a picture to an article' (8), 'Test curly braces' (3), 'table error' (3), 'What is (end of user) screen?' (1), 'Add a glossary item' (1), 'Delete an article' (1), 'Pycowal, nomaflow42' (1).

Note:

- We keep records at summary level only. We do not break data down into individual users.

This functionality works in version 4.0 only

Logs

What's new with logging for release 4.0

Track search queries

To track what searches users have used to find information in the knowledgebase:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Search** tab

Date	Search String	Search In	Returned Rows	Details
1 day ago (11 Feb, 2011 09:04 AM)	components	All Knowledge base	1	View
1 day ago (11 Feb, 2011 09:03 AM)	no	All Knowledge base	0	View
1 day ago (11 Feb, 2011 09:03 AM)	providers	All Knowledge base	1	View
1 day ago (11 Feb, 2011 09:02 AM)	offof	All Knowledge base	1	View
2 months ago (08 Dec, 2010 12:59 PM)	test	All Knowledge base	2 11	View
2 months ago (08 Dec, 2010 06:17 AM)	test	All Knowledge base	2 11	View
2 months ago (27 Nov, 2010 02:50 AM)	test	All Knowledge base	2 11	View

The information displayed on this screen shows:

- When the search was done
- The string the user typed in
- Categories they searched in
- How many results were returned.

You can filter results on

- Area of knowledgebase
- How recently searches were made
- Whether the search was successful or not
- Or you can search on a specific search string.

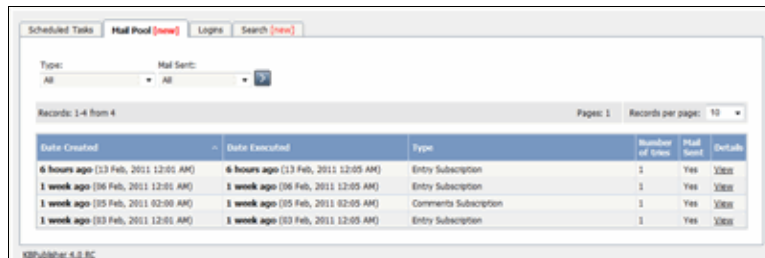
Note: You must have administrator privileges to see log details.

This functionality works in version 4.0 only

Track emails

To track what emails have been sent, and whether they succeeded or failed:

- Log in to the **Admin Area**
- Click on the **Logs** menu
- Click on the **Mail Pool** tab



The screenshot shows a web interface for 'Scheduled Tasks' with a 'Mail Pool' tab selected. Below the navigation are filters for 'Type' and 'Mail Sent', both set to 'All'. A table displays four records. The table has columns: Date Created, Date Executed, Type, Number of tries, Mail Sent, and Details. The records are as follows:

Date Created	Date Executed	Type	Number of tries	Mail Sent	Details
6 hours ago (13 Feb, 2011 12:02 AM)	6 hours ago (13 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	View
1 week ago (06 Feb, 2011 12:02 AM)	1 week ago (06 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	View
1 week ago (05 Feb, 2011 02:00 AM)	1 week ago (05 Feb, 2011 02:05 AM)	Comments Subscription	1	Yes	View
1 week ago (03 Feb, 2011 12:02 AM)	1 week ago (03 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	View

The information displayed on this screen shows:

- Date and time the mail was created
- Date and time it was sent (or tried to be sent)
- Type of mail it was
- How many times the system tried to send the mail
- Whether or not the send was successful
- The full log details. These are the details summarized on the mail pool tab, plus the contents of the mail that was sent/tried to be sent.

Note: You must have administrator privileges to see mail log details.

This functionality works in version 4.0 only

Changes for release 4.5

Changes implemented in release 4.5

The Admin Tab Explained

The **Admin** tab is the first tab under **Settings**. The settings here apply to the admin area, and to admin users.

Only administrators can change the settings on this tab.

1. **Filter** allows you to reduce the number of fields displayed to make it easier to find.
2. The **Security / Privacy** settings control user logons.

- **Session expires (in minutes)** controls how long before the user is automatically logged out when they do not use the system. In the example above, users will be logged out if they do not use the knowledgebase for two hours. If you wish to turn automatic logout off, set this to 0.
- **Enable visual confirmation to login** controls whether a user has to type a confirmation code



e.g. before they can log on.

- If you want the user to type in their old password to allow them to change to a new one, check **Old password required to change password**. If you don't check this, then the

user can change the password without typing their old one.

3. **Look & Feel (settings)** control how the admin area is displayed.

- **Box width** controls the width of the frame in which the administrator screen is displayed. You can set the width in either pixels (in the screen example it is 980px), or as a percentage of the width of the user's screen (e.g. 90%).
- Default **number of records displayed on a page** is the number of records on a page that is first displayed when a user goes to that page. The user can change the setting manually while they are on the page.
- **Sort articles by** sets up the default sort order articles are displayed in. Sort can be alphabetic, or by date added or modified. Users can override these settings if they prefer a different sort order.
- Likewise, **sort files by** sets up the default sort order files are displayed in. Again, users can override these settings with their own personal display order preference.

4. The **HTML editor file directory** tells the knowledgebase where to look for the files that you attach as images or links to articles. That is, when you, say, insert a picture into an article, this is where the picture will be found or uploaded.

You can also set up automated reporting of errors by selecting **send critical messages to admin**. This means that if your knowledgebase has critical errors in scheduled tasks, the administrator will receive an email stating that there were problems with the cron jobs and can quickly log on to fix it. The email address that errors are sent to is that of the email administrator defined in the Email settings tab.

5. The **Article** settings history and autosave settings for individual articles.

- The **maximum number of revisions** controls how many revisions are stored for a document. If you set this to, say, 5, then on the sixth revision the earliest version is deleted, overwritten by the new one. If you don't want to keep article history at all, make this 0.
- KBPublisher can automatically save your article changes at specified intervals. **Autosave recovery information every** sets the number of minutes between autosaves. If you make this 0, you turn autosave off.

7. The **File Configuration** section controls what files can be uploaded. This includes:

- Where the files are uploaded to (**files directory**). This is the server path format.
- How big the files can be (**max file size**)
- Types of files that can be uploaded (**allowed extensions**)
- Types of files that cannot be uploaded (**denied extensions**)
- Whether or not to include the files in the search, if possible (**extract raw text**)
- Whether or not to parse (index for searching) content of PDF files, and if you do parse them, where the program is that gets the text out of the PDFs (**XPDF installation path**)
- Whether or not to parse (index for searching) .doc (Word) files, and if you do parse them, where the program is that gets the text out of the doc files (**catdoc installation path**)
- Whether or not to parse (index for searching) .doc (Word) files, and if you do parse them, where the program is that gets the text out of the doc files (**Antiword installation path**)
You can use either Antiword or catdoc. You don't have to use both.
- What the auto-load directory files functionality should do when it finds a file listed in the database but no longer on the server (**spy directory missing files policy**)

8. **Set defaults** resets your settings back to the KBPublisher defaults.

Custom Fields

Custom Fields

You can customize your knowledgebase by adding custom fields. These custom fields can be defined for:

- Specific article categories
- Specific file categories
- News items
- Feedback form

For articles, the custom fields can:

- Be displayed at the top of the article
- Be displayed at the bottom of the article
- Be displayed after the rating block
- Or they can be hidden, for internal use only

For files, fields are for internal use only. That is, you can see them when you add the file, but the user cannot see them.

Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

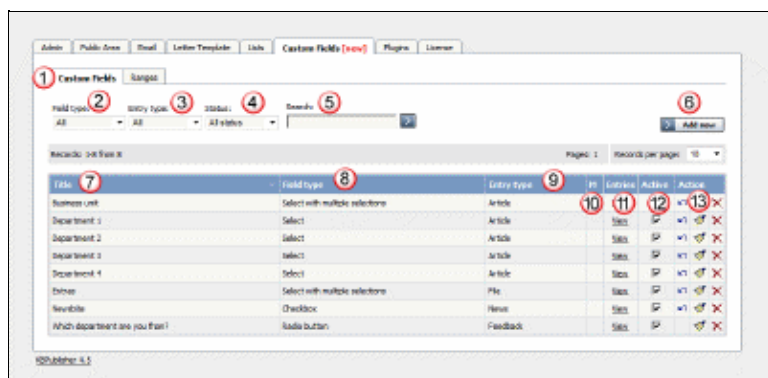
Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

The Custom Fields Tab Explained

This screen allows you to create custom fields, and to place them in your knowledgebase.

The Custom Fields tab



1. The **Custom Fields** tab allows you create and manage the fields and to control which categories or areas they are attached to. The **Ranges** tab allows you to create a set of valid values which you can then assign to one or more custom fields.
2. **Field type** is a filter that allows you to view custom fields for a specified Field types. Select your filter and then click the search/filter button to restrict the list.
3. **Entry type** is another filter. This allows you to view all custom fields associated to articles, or to files, or to news items or to feedback. Use with the search/filter button to show only fields of that type.
4. **Status** is a filter as well. This allows you to view custom fields ...
5. Or you can also search on the name of the custom field by typing the name into the **Search** fields and then clicking the search/filter button.
6. Clicking the **Add New** button allows you to create a new custom field. Note that you can only create the field to go with a specific entry type. Thus If you want to add, say, a *Department* field to both articles and files, then you would need to create two custom fields.
7. The **Title** is the name that the user sees on the screen when they add or read an article
8. The **Field type** denotes the type of field it is. Whether it's a checkbox, or a select box, or even free-flowing text
9. The **Entry type** is which area of the knowledgebase this field is used in. That is, whether it is used in articles, files, news items or feedback.
10. **M** denotes mandatory. When a field is mandatory the author creating the item cannot leave this field blank.
11. If you want to see which articles contain values in the mandatory field, click **View** entries. This takes you to a list of articles that have information in the selected custom field
12. To turn the field on so that it is able to be filled in, ensure that it is **Active**. To hide it, uncheck **Active**.
13. There are three **Action** fields: apply, edit and delete.
 - ◆ **Apply** allows you to set a value for all articles which match field criteria. This is useful when you already have existing items and want to add a value to the old items. Note that it only applies value to items that do not already have an associated custom value, so you don't have to worry about overwriting items you have already set.
 - ◆ **Edit** allows you to edit the custom field. Note that you can also double-click anywhere in the line on the field to edit as well.
 - ◆ **Delete** allows you to delete the field. If you attempt to delete a field that is being used you will get a warning message telling you the field is being used and you

will need to decide if you still wish to delete the field after that.

The Ranges tab



The ranges are the valid values you can select from. For example, you may have a list of departments, or a checkbox that allows you to denote whether extra information is required.

You can also re-use ranges. That list of departments might be a drop-down select box in your FAQ category, and a radio-button select on the feedback form.

14. **Add New** here means add a new set of valid values
15. Click on the **Title** to open the range set and add new values or edit existing ones, including re-order the fields.
16. **Description** is a description of the field range. When a user is adding a custom field, this is the text they see when they click on the inline help
17. **View** takes you to a list of custom fields that contain this range
18. The **Action** field has three options: load, edit and delete.
 - ◆ **Load** takes you to the range, so that you can edit, update or re-sort the individual valid values
 - ◆ **Edit** allows you to rename the range and update the description
 - ◆ **Delete** deletes the range. If the range is being used by custom fields, you will not be able to delete it. Use View to see which fields contain the range.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Add a new custom field

Custom fields

Custom fields are fields created by you, especially for your knowledgebase.

Adding them is a three-part process.

- First you define your field,
- Then you decide where in the database this field will be included
- Lastly, you define any valid values you wish to use.

To add a new custom field

- Click on **Settings** menu
- Select the **Custom Fields** page
- Choose the **Custom Fields** tab
- Click **Add New**
- Choose your **field type** by clicking on one of the field types.
This takes you to the **Entry Type** tab.
- Choose where this custom field will appear by clicking on an **Entry Type**. Note that if you want the field to appear for, say, both articles and files, you must create two separate fields, although you can use the same range
- If you are adding the field to articles or files, you will then be taken to the **Categories** tab and prompted for a **category**. Add any categories where the field is to be displayed. If you want the field displayed in all categories, leave this blank
- Click **Form Options** to go to the next tab if you need to. If you chose an entry type of news or feedback you should already be here
- Add the name of the field to the **Title** field
- Add a **tooltip** if required
- Check **Mandatory** if you want to force the user to fill in this field
- Check **Active** if the field is to be used immediately i.e. if you want the field to appear on the screen
- Click on the **Range** tab
- Click on **Set Range**
- If you wish to use an existing range click **Assign** to assign the range
If you wish to create a new range, click **Add New** and [add the new range], then click **Set Range** to assign the range to the custom field
- Click on the **Display Options** tab
- Use the drop-down **Display** field to choose where the field is to be displayed on the screen.
Note that when you enter the field as part of creating the article, it is always displayed under the article content. This display field defines where the text is displayed in the Public area
- If you wish you can also add some text around the field by adding it to the **HTML Template**. For example if your custom field is 'Department' and the value you input is 'Sales' then:
{title}: {value} - displays *Department: Sales*
Welcome to the {value} team - displays *Welcome to the Sales team*
Note that this extra text is not displayed if you have chosen 'Hidden, not displayed in Public Area' as the display option
- Click **OK** to create the field.

- If you have existing articles or files in the categories to which you are adding the new custom field, then you will be given the option to add a default value to those items. If you wish to add a default value, select the value.
- Click **OK**.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Add a new custom field range

What is a custom field range

A range is a list of valid values that you can use in your custom fields.

Once you have set up a range you can re-use it as many times as you like. For example, one time you might have it as a drop-down option in an article category, another time you might include it as a radio button list in the news area.

Create the range

- Click on **Settings** menu
- Select the **Custom Fields** page
- Choose **Ranges** tab
- **Add New**
- Add an appropriate name to the **Title** field, for example, Department.
- We recommend that you add an appropriate **description** as well.
- Click **OK**.

This adds the field and sets up ready to add each of the values. Then, for each valid value you wish to add:

- ◆ Add the name of the value in the **Title** field
- ◆ Add a number in the **Order** field to show where it will be placed in the list. By default this is numbered sequentially in the order that you add them
- ◆ **OK** if you wish to add another valid value.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Update values in a custom field range

To update values in a custom field range

- Click on **Settings** menu
- Choose **Custom Fields** tab
- Choose **Ranges** tab
- Click on the name of the range that you wish to edit

From here you can

- Add new values to the range by
 - ◆ Click **Add New**
 - ◆ Add a **Title**
 - ◆ Click **OK**
- Change the name of a valid value value by:
 - ◆ Click on the edit icon of the value you wish to change
 - ◆ Update the **Title**
 - ◆ Click **OK**
- Delete existing values
 - ◆ Click on the delete icon of the value you wish to change
 - ◆ Click **OK** to confirm that you really do want to delete the value
- Reorder the range
 - ◆ Click on the edit icon of the value you wish to change
 - ◆ Type the new order into the **Order** field
 - ◆ Click **OK**

You will need to do this for each valid value in the range, as the other values do not automatically re-order themselves.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

To see where a custom field is used

To see all items where a field is used

Click on **Settings** menu

- Choose the **Custom Fields** tab
- Click on View in the **Entries** column

To see where items with a specific valid value are used

This functionality works in a similar way for articles, files, news and feedback, even though the example given here is for articles.

- Log on to the **Admin area**
- Click on **Articles** (if field is under Articles, or Files, News or Feedback if field is under, respectively, files, news or feedback)
- Click on the '+' button to the left of the category drop-down

The screenshot shows the 'Articles' management interface. At the top, there are navigation tabs: 'Articles', 'Comments', 'Rating Comments', 'Glossary', 'Categories', 'Article Template', and 'Public View'. A yellow banner at the top states 'There are autosaved drafts available. Click here to review drafts.' Below the banner, there are search filters: 'Category' (set to 'All'), 'Status' (set to 'All status'), and 'Type' (set to 'All types'). A 'Department' dropdown is set to 'Human Resources'. There are checkboxes for 'Extras required' (DID and Tablet) and an 'Email' input field. A 'Search' button is highlighted with a red circle and the number 3. The bottom of the page shows 'Records: 1-10 from 171' and 'Pages: 1 from 18'.

This brings up a list of all custom fields for articles (or files/news/feedback)

- Select the specific field and value that you are looking for
- Click on **Search**.

This brings up a list of all articles with that particular custom field value.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

Search in custom field in public area

You can search for data in both the [Public Area](#) and in the [Admin Area](#).

To search in the Public Area

- Click on **Advanced Search**
- From the **Search In** drop-down box, choose **Attachments and inline files**
- At the bottom of screen you will see an **Extra Options** section which contains all the custom fields

To search in the Admin Area

- Click on **Articles** (if field is under Articles, or Files, News or Feedback if field is under, respectively, files, news or feedback)
- Click on the '+' button to the left of the search area

This brings up a list of all custom fields for articles (or files/news/feedback)

The list of custom fields display by default is custom fields that are included in all categories. If you want custom fields that are listed only in a specific category, select the category

Once you have your list of custom fields

- If necessary, choose a **category**.
Categories default to 'all' and will also search in sub-categories if you use the default options
- Choose which field you wish to search on, and choose which data you wish to search for
 - ◆ If the field is a multi-choice field you will be presented with a list of drop-down values to select from

- ◆ If the field is a checkbox, you will be able to check the value to choose items with that flag set
- ◆ If the field is a text field, you will be able to type text into the field to search on and so on.
- Click **Search** to start the search.

This brings up a list of all articles with that particular custom field value.

Some working examples for search

Let's say you have a knowledgebase set up as follows:

Article	Category	Custom field	Valid values for custom field	Custom field defined at category level	Value in custom field
Teach yourself Photoshop	Product	Extras	DVD T-shirt Game	No	DVD
Nerds Rule	Product	Extras	DVD T-shirt Game	No	T-shirt
How to Make Cards	Product	Extras	DVD T-shirt Game	No	-
Our London Office	Branches	Retail shop	Yes No	Yes	Yes
Our Paris Office	Branches	Retail shop	Yes No	Yes	Yes
		Extras	DVD T-shirt Game	No	T-shirt

No valid value has been set for the article *How to make cards*. Also, *Extras* can be defined anywhere.

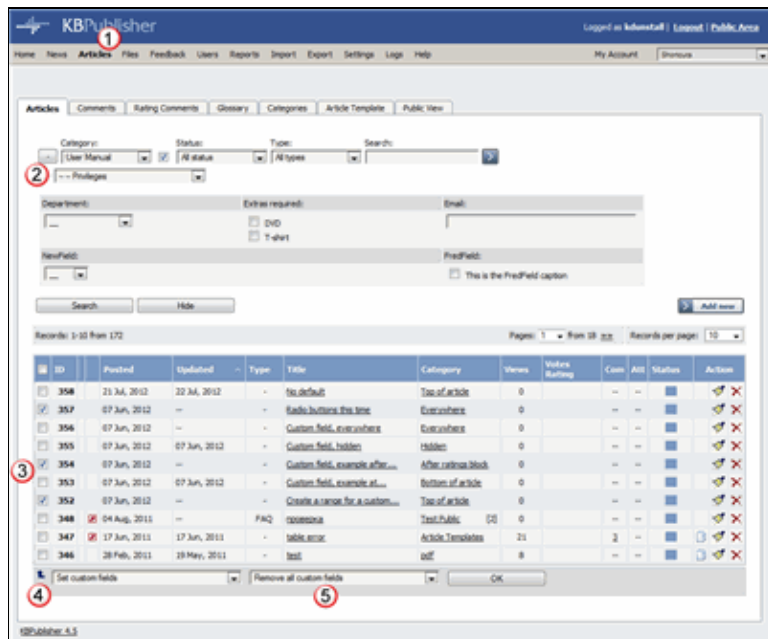
- If you click on search without defining any further parameters this brings back a list of all articles which contain values in any custom field, hence it would return:
 - ◆ *Teach Yourself Photoshop*
 - ◆ *Nerds Rule*
 - ◆ *Our London Office*
 - ◆ *Our Paris Office*
- If you select *T-shirt* in the *Extras* custom field, and then click on search (still not having defined any further parameters, or using *All*), this will bring back:
 - ◆ *Nerds Rule*
 - ◆ *Our Paris Office*
- If you select *T-shirt* in the *Extras* custom field, and choose the *Product* category, this will bring back:
 - ◆ *Nerds Rule*

- If you choose *T-shirt* in the *Extras* custom field, and *Yes* in the *Retail Shop* field, and search all levels, then your search will return:
 - ◆ *Nerds Rule*
 - ◆ *Our London Office*
 - ◆ *Our Paris Office*

This last is because it will search for either field, rather than both fields.

Bulk add or update custom fields

To bulk add or update custom fields, log on to the and Admin area and then:



1. If you are updating:

- an article custom field, click on the **Articles** menu
- a file custom field, click on the **Files** menu
- a news custom field, click on the **News** menu
- a feedback custom field, click on the **Feedback** menu

2. By default, the listing displays all custom fields that are not assigned for specific categories.

To see fields assigned to a specific category, select the category you wish to search on. This displays all custom fields for the category, plus any custom fields that are not assigned to a specific category.

3. Select the items whose custom fields you wish to update.

4. Choose **Set custom fields** from the **Actions with selected** drop-down.

5. This brings up a second drop-down box for you to select from.

6. If you wish to:

Remove any custom fields set:

- ◆ Choose **remove all custom fields** from the second drop-down box
- ◆ Click **OK**

Update a single custom field:

- ◆ Choose the custom field from the second drop-down box
- ◆ This brings up the fields associated with the category beneath the drop-down
- ◆ If the field is not currently associated with the item(s), this brings up a check-box **add to existing**
- ◆ If you wish to add the field to the selected items, check this box
- ◆ Update the field as required
- ◆ Click **OK** to save the change

Update all the custom fields at the one time:

- ◆ Choose **set all custom fields** from the second drop-down box
- ◆ This brings up the fields associated with the category beneath the drop-down
- ◆ Update fields as required
- ◆ Click **OK** to save the changes.