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User Manual v6.0

User manual for KBPublisher v6.0

Introduction

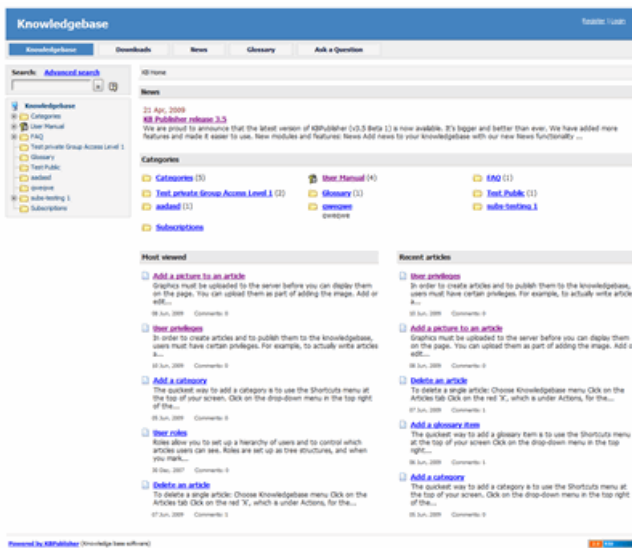
What is KBPublisher?

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



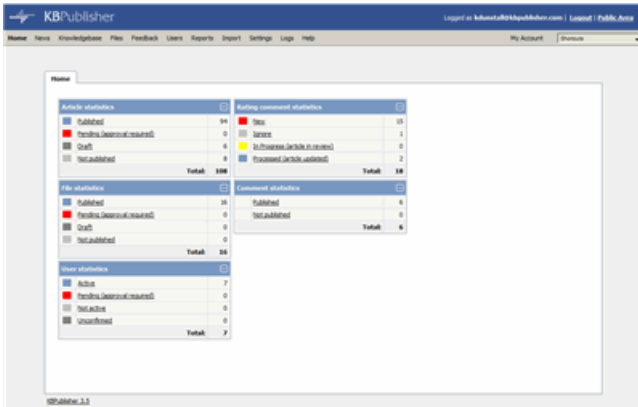
KBPublisher navigation gives you quick access to:

- 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.

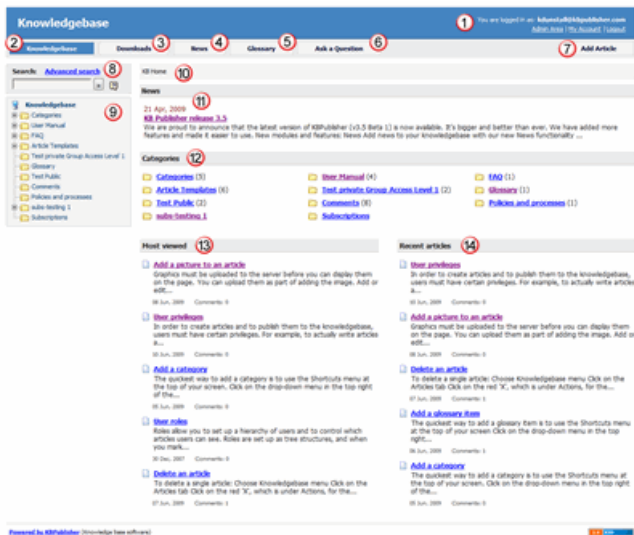
Public Area (front-end)

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.

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 these 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 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.



Admin Area (Back-End); Common Actions

This article describes the Admin area home page and reviews the standard information you see and actions you can perform throughout the Admin area.

Home page

When you log in to the Admin area you see the **Home** page:

The screenshot shows the Admin Home page dashboard with the following sections:

- My Article Drafts:** In progress (0), Waiting for approval (0), Rejected (0). Total: 0.
- Article Drafts assigned to me for approval:** As Category Supervisor (0), As Specific User (0), As Privilege Holder (0). Total: 0.
- My File Drafts:** In progress (0), Waiting for approval (0), Rejected (0). Total: 0.
- File Drafts assigned to me for approval:** As Category Supervisor (0), As Specific User (0), As Privilege Holder (0). Total: 0.
- My Articles:** Published (0), Pending (approval required) (0), Draft (1), Not published (0), Outdated (0). Total: 1.
- My Files:** Published (0).

This page has three tabs: **Dashboard**, **Statistics**, and **Set Up Tests**.

To adjust the information that appears on the **Dashboard** or **Statistics** tab, select that tab, then click the **Customize this Page** button. In the form that appears check the check boxes beside the information that you want to display. Any changes you make take effect when you dismiss the form.

Dashboard tab

This tab displays a summary of content created by or assigned to you, including your articles and files in draft form, published articles, and articles and files assigned to you for approval. The content is grouped within each category by status. Click any link to see a detailed list of the content in that category and status.

Statistics tab

This tab displays counts of articles, files, and users in various categories. Click on any link to see more details. If you are logged in as an Admin user, you see information for the whole knowledgebase; otherwise you see statistics for your own articles and files only.

Set Up tests tab

The Set Up tests tab lets you review how your knowledgebase is set up, and test that all elements are working as they should. See [Setup tests](#).

Common actions in the Admin area

This section reviews information you can see and actions you can take in the Admin area of KBPublisher. The image shows the **article** screen because it has the most functionality, but the explanations are applicable for working with **files** and **feedback** in the knowledgebase as well.

The screenshot shows the Admin article list screen with the following table:

ID	Posted	Updated	Type	Title	Category	Views	Votes Rating	Alt	Status	Action
344	02 Feb, 2011	22 Jan, 2015	-	It's time to test the...	Company Specific	44		--	■	[icon]
428	14 Jan, 2015	--	-	Portfólio Corporativo de...	Company Specific	9		--	■	[icon]
427	05 Jan, 2015	07 Jan, 2015	INFO	Understanding the Views Report	Articles	0		--	■	[icon]
418	11 Nov, 2014	14 Nov, 2014	-	article_for_report	Getting started	3	1 / ★★★★★	2	■	[icon]
421	14 Nov, 2014	14 Nov, 2014	-	[COPY]article_for_report	KBPublisher	0		2	■	[icon]
426	14 Nov, 2014	14 Nov, 2014	-	[COPY]article_for_report	Getting started	0		2	■	[icon]
415	05 Nov, 2014	14 Nov, 2014	INFO	The Views Module	Test	0		1	■	[icon]
420	14 Nov, 2014	14 Nov, 2014	FAQ	draft_article_1	Users	0		--	■	[icon]
425	14 Nov, 2014	--	FAQ	[COPY]qwerty	KBPublisher	7		3	■	[icon]
424	14 Nov, 2014	14 Nov, 2014	FAQ	qwerty	KBPublisher	7		3	■	[icon]

The main section of the display is a list, in this case of the articles in your knowledgebase.

Right-click any item in a list in the Admin area to display a context menu. From that menu you can select options like opening the link you clicked in a new window.

For many columns, you can **sort the list** by the values in that column by clicking the column header. Click again to reverse the sort order.

You can **filter the list** using one or all of the fields at the top of the tab:

- **Category** - select a category to display only records in that category. Check the check box to the right of the field to also display records in subcategories of the category you select.
- **Status** - select a status to see only records with that status.
- **Type** - select:
 - All types (the default)
 - a type to see records with that type assigned.
 - Any type assigned to see records which have any type assigned to them.
 - No type assigned to see only records that do not have a type assigned to them.
- **Search** - enter keywords to search for content with that text in their title or body. Put * as a wildcard before and/or after the string you enter to broaden the search ("*health*") would return content with "health", "unhealthy", and "healthcare", among other words.

Click the > button to filter the list. To return to the full list, remove entries to all filter fields and click > again.

To create a new record, click **Add new** and complete the form that appears.

You can adjust how many items appear on each page by changing the number in the **Records per page** field. You can browse from page to page using the << and >> buttons, or by choosing a number from the **Pages** dropdown list.

The **display** gives you information about each article (in this example), including:

- Item **ID**.
- If the article is scheduled a **clock icon**.
- If the article is private, a **key icon**.
- The article's **type**, if it has one.
- When the article was **created** and most recently **updated**.
- The article's **title**. Click the title to see the article.
- The article's **category**. If it is in more than one category, the number of categories also appears in square brackets. Click the category name to see just the articles in that category.
- The number of **views** the article has had.
- If readers have rated the article, its **rating** and the number of votes received.
- If the article has **attachments**, the number of attachments.
- The article's **status**, indicated by a block of color. Hover the mouse pointer over the color to see what the color represents.
- If past versions of the article are available, a **history** icon appears. Hover the mouse pointer over it to see the number of past versions, or click the icon to learn more about past versions or to read them.

You can perform certain **actions** on the articles in the list. Click the icon in the **Action** column for an article and choose from the available options, such as Preview and Edit.

You can also perform some actions, such as Set Status, on several articles at the same time. To do this, check the check box at the left end of the row for each article you want to act on, and pick the action from the **Actions with selected** menu at the bottom of the list.

How search works

By default, KBPublisher's search functionality uses **MySQL** full-text searching, which is a natural language search that allows you to type in a question or sentence that describes the information you are searching for. The program uses logic to determine the keywords in the sentence.

Optionally, you can use **Sphinx** search engine. Sphinx is a full-text search engine that provides fast and relevant full-text search functionality. For more information, see [How to enable Sphinx Search](#).

What it searches

If you did not specify any search options, the search functionality examines the following:

- Article: title, content, meta description, keywords (tags)
- File: title, file name, content , keywords (tags)
- News: title, content, keywords (tags)

The advanced search allows you to narrow your search to a specific content type or date range, or to restrict your search to titles, keywords/tags, or entry IDs. In addition, depending on the content type you've selected, extra options let you choose categories or article types to search.

Special search

If you enter a numeric value in the search box, the search identifies articles or files with this ID number. To find numeric values in article contents, type the number with quotation marks, such as "123". You can change this behavior in Settings -> Common by checking or clearing the "Search by Article ID" checkbox.

Search results

The search results page shows the number of results found. For each result, you can see the item's title, a content preview, the item's location in the knowledge base, the date the item was last updated, and number of article comments.

Search suggest

As you type in the search field, the search engine offers suggested results based on popular content or spelling variations. To have this option you should follow the steps to [enable searching spell suggest](#), which is off by default.

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.

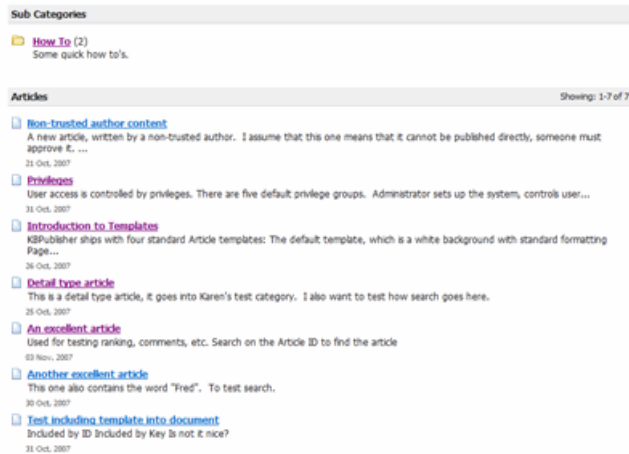
Note:

- 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:

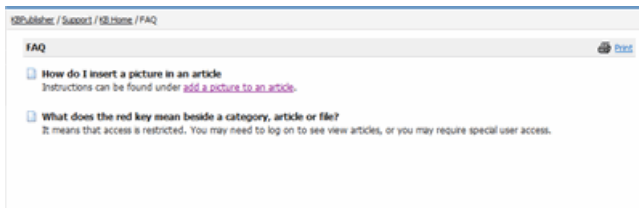
- The **Standard** (default) type displays a list of articles, along with one or two lines of text. If the category has sub-categories, these are displayed above the list.



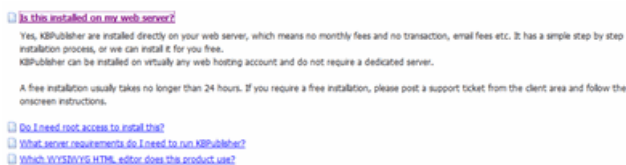
- The **book** type displays items as a table of contents.



- 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.



Ask Question and Quick Response

Ask a Question

If you still cannot find the information, you can use KBPublisher's "Ask a Question" feature. As you type in the **Question / Comment** textbox, KBPublisher will display articles that might answer your question. If that list doesn't provide the answer you're after, click **Send** to email your question to the knowledgebase administrator. Questions can be targeted, too, so that questions will be sent to different users in your knowledgebase based on the item selected in the Subject dropdown box.

For more information on configuring recipients for Ask a Question submissions, see the following articles:

- [Set Who Receives Emails](#)
- [How Can I Route a Question Based on the Subject?](#)
- [Add New Feedback Subject](#)

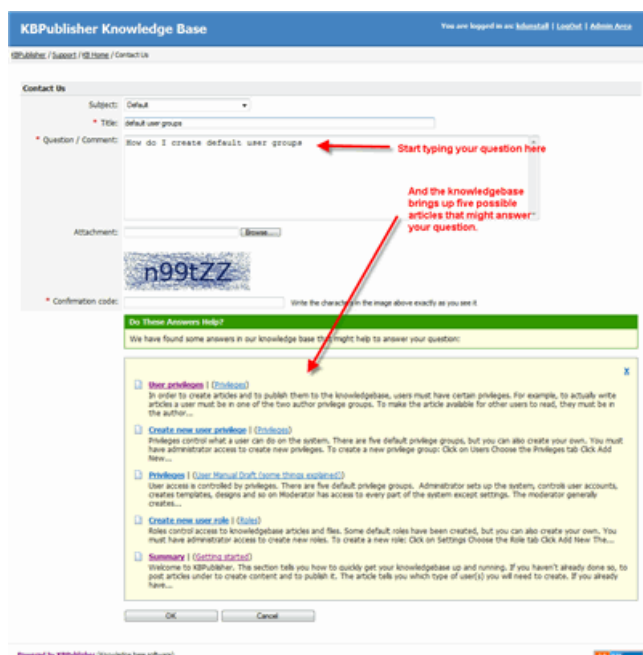
Quick Response

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.



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' management interface with a sub-tab for 'History [331]'. It displays a 'Live Revision' table with columns for ID, Date updated, Comment, and Actions. Below the table, there are navigation options for 'Records: 1-4 from 4', 'Page: 1', and 'Records per page: 10'. The table contains four rows of revision data, with the most recent being the current live version.

ID	Date updated	Comment	Actions
5	26 Apr, 2011 03:01 AM	Updated for release 4.0.	[Icons]
4	26 Apr, 2011 03:01 AM	Rollback from revision #1	[Icons]
3	26 Apr, 2011 03:58 AM	Added screen image	[Icons]
2	26 Apr, 2011 03:57 AM		[Icons]
1	26 Apr, 2011 03:56 AM		[Icons]

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:

- Articles
- Files
- News
- 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'.

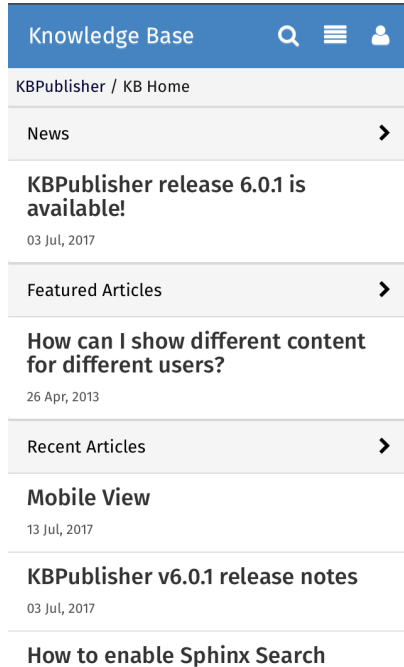
You can show or hide any field in a search form.

Mobile View

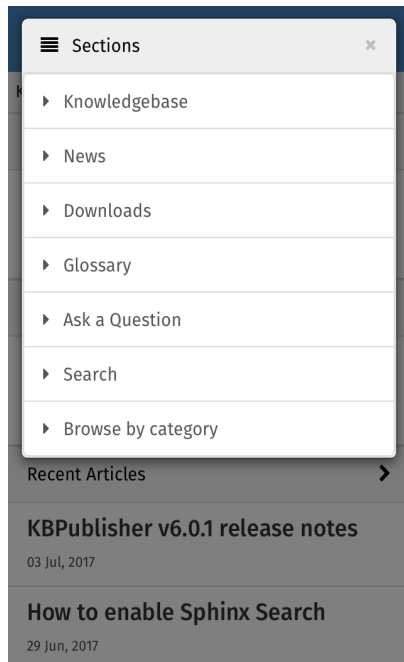
Mobile View is specially optimized working with KBPublisher on your mobile devices - smartphone or tablet. All news and articles are shown as a list to simplify access. Also you can easily switch view mode from mobile version to full view. Mobile View is enabled for Public Area only.

Some screenshots below.

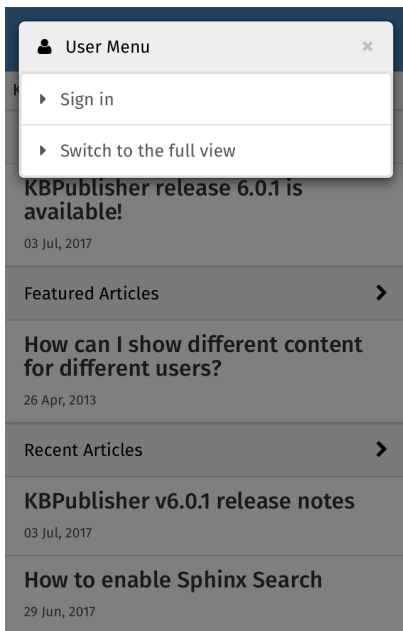
The KBPublisher home page has two banners for navigation and to manage your account: News and Recent Articles.



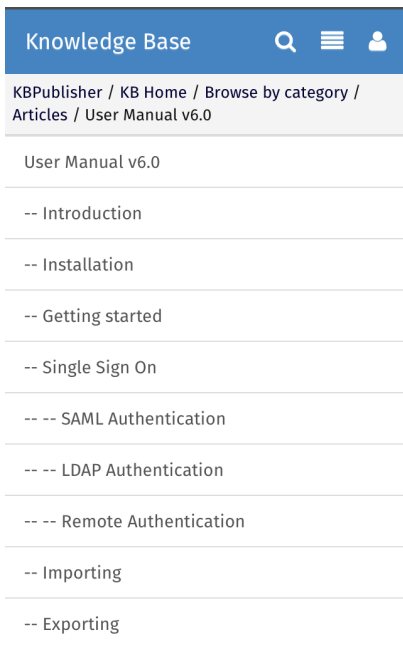
Main menu opens by clicking on **Options (hotdog)** button. You can choose any module or return to home page.



Settings opens by clicking on **User** button. You can switch to the full view or go to your account.



You can view articles within a category via Browse by category



This functionality works in version 5.0 and above

Automations

Use automations (automated tasks) to check your content regularly and perform certain actions as needed. You can make sure your articles are up to date, and alert staff to review them when they are not. You can let authors know when articles have been approved for publication, or let managers know when articles are ready for review.

To access your automations, select **Tools** from the menu bar. Then select the **Automations** sub-tab.

Essential facts for automations

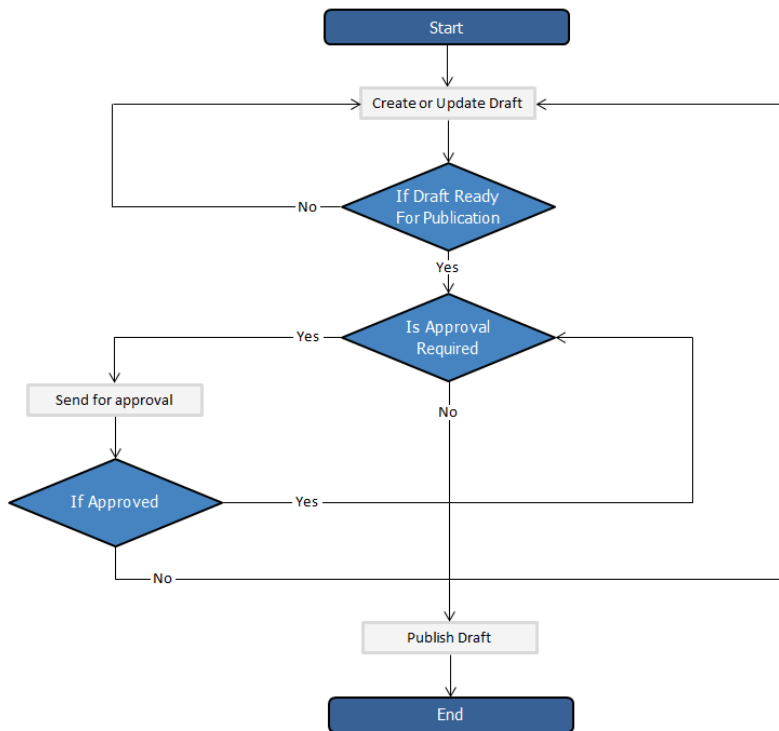
- Automations are time-based: they act when a time-based event occurs, such as the time since an article was edited exceeding a specified maximum time.
- Automations run daily, at midnight.
- An automation must contain a condition that is true only once, or an action that nullifies at least one of the conditions; otherwise, the automation will run daily, possibly sending unwanted duplicate alerts every time it runs.

Workflows

Workflows automate processes for reviewing, approving, and publishing articles. This can save you time and make sure articles that may be ready to publish, but need approval, are not overlooked. If the item requires review and approval before it is published, a workflow can transfer the item to the worklist of the person who is responsible for approving it. That person can approve the article or send it back for further edits.

Workflow Flowchart

The image below shows the path the draft of an article or file might have to follow if, after the author has written or uploaded it, one or more people have to review and approve it before publication.



Essential facts for workflows

- Workflows are applied to drafts of articles and files only
- You cannot delete or edit a workflow which in use (is applied to some drafts).
- You can have as many approval steps in a workflow as your project's process requires.

Drafts

The **Drafts** module lets users create new articles, or modify existing published articles, without interfering with live publications. Users can create and modify drafts in a separate area until each draft is finished and ready to go live.

The Drafts module lets you require specific contributors to create drafts that must be approved before publication, rather than publishing their material directly.

To learn about creating and managing your drafts, see [Manage drafts](#).

Essential facts about drafts

- Users with admin privileges can create, approve, reject, or delete any draft at any stage in the approval process.
- If a draft has been sent for approval, the author cannot update it until the review is complete.
- Your knowledgebase records approval decisions in a log for future reference.

Drafts and Workflows

When a draft is ready to publish, an approval [workflow](#) can route the document or item to the **assignees**, one or more people assigned to review such material before publication.

Assignees can approve the article for publication or send it back to the author for more work. They can also provide feedback on an article. The feedback is compiled and sent to the person who initiated the workflow.

Possible scenarios when a user adds a draft

1. There is a matching workflow

The author of a draft can save the draft repeatedly while working on it until the material is ready to submit. When the user submits the draft for approval, the workflow assigns it to appropriate assignees. The user has no further access to the draft until it is approved for publication or returned for further edits.

2. There is no matching workflow and the user's privileges do not permit adding articles

The author of a draft can save the draft repeatedly while working on it. However, the user cannot publish the draft, and there is no way to send the draft for approval.

3. There is no matching workflow, and the user's privileges permit adding articles

The author of a draft can save the draft repeatedly while working on it. When the draft is ready to publish, the user can publish it. Once the draft is published it no longer appears on the list of drafts, and does appear on the list of articles.

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 9.0+ or Chrome, Firefox, Safari.

Server side

- Operating System: Linux, Unix, Windows, Mac
- Web Server: Apache Web Server / IIS 7.5 or above
- Database: MySQL 5.0 - 5.7
- Scripting Language: PHP 5.3 - 7.1

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. If you have errors that directories are not writeable you need to set up Write permissions, see [this article](#). 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 the distribution package somewhere in your web server's document root, preferably the parent directory of your root web directory. For many systems, 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 the folder to 'kbase' and place it in the document root directory, the URL for the knowledge base will be **www.your_domain/kbase/**.
4. Create an empty MySQL database to be used by KBPublisher, or use an existing database.

To create a new database run the following commands in 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 your directory structure:
 1. Create a directory to store files users upload with the **File** option. We recommend that you name the directory **kb_file** and place it somewhere outside your document root directory. It should not be accessible to web browsers via http.
 2. Create a directory to store files users upload through the **HTML editor**. We recommend that you name the directory **kb_upload** and place it in document root directory.
 3. 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 the db dump file at **kb/setup/db/install.sql**.
 - Create an admin user using the file at **kb/setup/db/create_user.sql**.
7. If you are upgrading from a previous version of KBPublisher:
 - Back up your existing database before upgrading!
 - Use the DB dump file **kb/setup/db/upgrade_[version]_to_[version].sql**.
8. 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'] = '/';
```

9. In some cases you have to configure your **kb/index.php** file to set the correct path for the admin directory and the **kb/rss.php**, **kb/captcha.php** files to set the correct path to the kb installation directory. Normally these will work without any modifications.
10. 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](#).
11. [Set up scheduled tasks](#) to enable scheduling, reporting and subscriptions.
12. 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 THE PASSWORD!

13. Log in to KBPublisher and select the **Settings** tab to configure settings.
Make sure you set the correct email address at *Setting -> Email* .
14. 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']`.
8. Copy the license file from the previous version into the directory that contains upgraded version, i.e. copy 'kb_old/key.php' over 'kb/key.php'

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. Copy the license file from the previous version into the directory that contains upgraded version, i.e. copy 'kb_old/key.php' over 'kb/key.php'
5. 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.
6. 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:

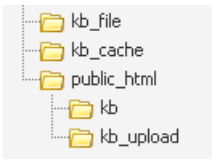
1. Backup your current KBPublisher installation, directory and database (recommended).
2. Copy the contents of the **kbp** folder found in downloaded "Modified Files Only" package to your current KBPublisher installation directory. We recommend that you copy the files by folder, rather than all at once.
(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.

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
syssem
sysshm

Setting Up Folder Permissions in Internet Information Services (IIS)

This article explains how to set up write permissions in the required folders for configuring IIS 7.0, 7.5, or 8.0 for KBPublisher.

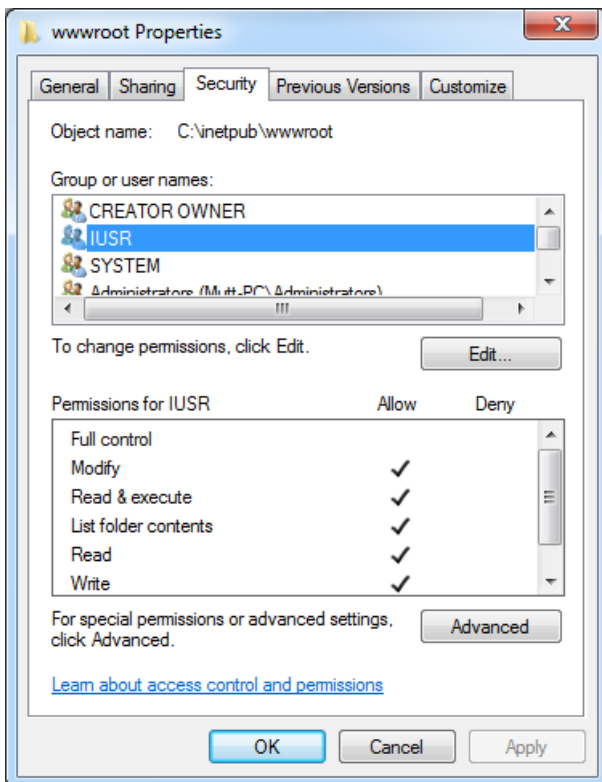
Using the standard folders structure for IIS and KBPublisher set write permissions for following folders:

- **C:/interpub/wwwroot/kb_upload** - for uploads via HTML editor
- **C:/interpub/kb_file** - for uploads via "Files" module
- **C:/interpub/kb_cache** - for cache files

*Note: this is the default category structure. Your configuration might be different.

For each of the above folders, do the following:

1. Right-click the directory, then choose **Properties**
2. Go to the **Security** tab
3. Find the **IUSR** account
(If IUSR is not in the list, add it by clicking **Edit**, then clicking **Add**, and then typing "IUSR" in the "Enter the object names to select" field.)
4. Highlight the user in the list, click **Edit**, and grant the account **Modify** and **Write** permissions



Setting up scheduled 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');"
```

Test antiword from command line

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

```
$ /path_to_antiword/antiword -t file_read.doc;
```

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

```
$ cd /path/to/kbp_directory  
$ php -r "system('/path_to_antiword/antiword -t 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 **WKHTMLTOPDF** (recommended) or **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

Using WKHTMLTOPDF (recommended)

- WKHTMLTOPDF is available from <https://wkhtmltopdf.org>
- Download it and install it

Update the setting to point to WKHTMLTOPDF

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

- You can find this under Settings menu, **Settings -> Plugins -> Export -> WKHTMLTOPDF installation path**
- Make sure the **WKHTMLTOPDF 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.

Test WKHTMLTOPDF from command line

To convert a single web page type:

```
$/path_to_wkhtmltopdf/wkhtmltopdf input.html output.pdf
```

Test using PHP and included test file:

```
$ php -r "exec('/path_to_wkhtmltopdf/wkhtmltopdf http://path_to_kbp/admin/extra/plugin/export2/template/export_test.html output.pdf');" 
```

Using HTMLDOC

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

- HTMLDOC is available from <https://www.msweet.org/projects.php?Z1>
- 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 -> Export -> 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.

Test HTMLDOC from command line

To convert a single web page type:

```
$/path_to_htmlodoc/htmlodoc --webpage -f output.pdf filename.html
```

Test using PHP and included test file:

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

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** -> **Export** tab
- Paste your key into the **Plugin key** field
- **Save.**

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 and above

Enable searching spell suggest

To help you avoid typos when entering search terms, you can install and enable one of the following tools:

- Pspell
- Enchant
- Bing spell suggest service (free or paid versions)

Each of these tools monitors the characters you enter in the search field and suggests words that match what you have typed so far and that match entries in your system data. You can then select one of the words or ignore the suggestions and continue typing.

You may find by experimentation that one of the tools works better than the others for your system and your data.

To enable spell suggest:

1. Select **Settings** from the menu bar in the Admin area.
2. In the form that appears, select the **Public Area** tab.
3. Scroll down to the **Search** section.
4. Locate the **Search Spelling Suggest** field and click the "..." button.

The form that appears shows the available spelling tools. If one is already selected and active, it is marked with a check mark. If no tool is active, you can activate one as described below.

Click **Save** to save your settings and return to the main form. Click **Cancel** to abandon your changes and close the Settings form.

Enchant

Enchant is the PHP binding for the "Enchant" spelling library. Enchant provides consistency among any running spell-checkers, and adds certain features that may be lacking in any individual provider library. Click the information icon beside the tool's name to see more information.

Click the icon in the Settings column to display the **Settings** form.

In the **Settings** form you can select the spelling library to use from the two "Active Dictionary" fields at the top of the form.

If you want to exclude some words from Enchant's attention so it does not suggest alternatives, enter the words, separated by spaces, in the "Exclude word list" field.

To make Enchant the primary spelling suggest tool, check the "Set as Primary" check box. This will deselect any other tool that is currently selected.

Pspell

Pspell is a spelling-assist tool that will help you enter search terms that will return "hits". Click the information icon beside the tool's name to see more information.

Click the icon in the Settings column to display the **Settings** form.

In the **Settings** form you can select the spelling library to use from the "Active dictionary" field at the top of the form.

If you want to exclude some words from Pspell's attention so it does not suggest alternatives, enter the words, separated by spaces, in the "Exclude word list" field.

To make Pspell the primary spelling suggest tool, check the "Set as Primary" check box. This will deselect any other tool that is currently selected.

Bing spelling suggestion

This option uses the Bing API to provide suggestions for spelling search terms to match data in the system. There is a free licensed version with a limited number of uses per month by your readers, or you can purchase a license that supports more uses per month. Click the information icon beside the tool's name to see more information, and to learn about obtaining a license.

Click the icon in the Settings column to display the **Settings** form.

To activate Bing spelling suggestion, you need to obtain a license. Click the information icon, as described above, and either get the free license or buy one of the license" allowing higher use. When you have obtained your license, enter the information you receive in the "Bing API Account Key" and "Bing request URL" fields.

You may find that your system runs somewhat slower when using the autocomplete feature in Bing. If so, de-select the "Use in Autocomplete predictions" check box.

If you want to exclude some words from Bing's attention so it does not suggest alternatives, enter the words, separated by spaces, in the "Exclude word list" field.

To make Bing the primary spelling suggest tool, check the "Set as Primary" check box. This will deselect any other tool that is currently selected.

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 in as an admin user
- Click **Home**
- Click the **Setup Tests** tab

The Setup Tests tab

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

- The **Files directory** is where files are stored. If this test's status is *passed*, it means that the folder exists and can be written to. If you need to check the name of the directory, click **Setting**.
- The **Cache directory** is where cached files are stored. This is defined in the php config file. You normally would not change this. *Passed* means that the directory exists.
- The **HTML editor file directory** is where images are stored. If the status is *passed* it means that the directory exists and you can save images to it. If you need to check or update the name of the directory, click **Setting**.
- **XPDF** allows you to search PDF files.
If this setting is *disabled*, then XPDF has not been installed. If the status is *failed or error*, details of the error will be provided.
If the status is *passed*, your knowledgebase should be able to search PDF documents.
To install XPDF, see [Enable Searching in Files](#).
- **Catdoc** allows you to search Word 2003 files.
If this setting is *disabled*, then Catdoc has not been installed. If the status 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](#).
- **PHP Zip extension** allows you to search Word 2007/2010 files and Excel 2007/2010 files and from OpenOffice documents.
If the status 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 the status is *passed*, then your knowledgebase should be able to search docx, xlsx, and .odt files.
To install PHP Zip extension, see [this link](#).
- **Spell Suggest** helps your knowledgebase users when they search for documents or files, by suggesting the correct spellings of the words the users are entering as search terms.
If the status is *passed*, then Spell Suggest is installed and end users should see helpful spelling hints. If the status is *failed or error*, details of the error will be supplied.
- **Htmldoc** allows you to export KB to PDF, it is required for PDF Export plugin.
If the status is *disabled*, Htmldoc hasn't been installed. If the status is *failed or error*, details of the error will be provided.
If this is *passed* then you should be able to export your knowledgebase as a PDF document and/or as HTML.
See [enable exporting to PDF](#) for setup and requirements.
- **Wkhtmltopdf** allows you to export KB to PDF, it is required for PDF Export plugin.
If the status is *disabled*, Wkhtmltopdf hasn't been installed. If the status is *failed or error*, details of the error will be provided.
If this is *passed* then you should be able to export your knowledgebase as a PDF document and/or as HTML.
See [enable exporting to PDF](#) for setup and requirements.
- **Scheduled tasks** tells you if your cron jobs are set up properly.
If the status 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 the status 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 the status is *passed* then your cron jobs have been set up properly and scheduled tasks should run.
- **Sphinx**
Sphinx Search Server allows you to enable fast full-text search capability.
[Click here](#) for how to set them up.

Note:

- This set of tests runs as a regularly scheduled task. If there is an error, the knowledgebase administrator is notified by email.

This functionality works in version 4.0 and above

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 a glossary item

The glossary gives your readers quick definitions or explanations of words or phrases important to your application, but which the reader might not know.

There are two ways to add a glossary item:

1. Click the **Add** icon  at the top right of the Admin screen and select **Glossary item**.
2. On the **Articles** tab select the **Glossary** sub-tab, then click the **Add new** button.

Either method displays the **Add new** form. Provide the required information for the new item:

- **Word/phrase** - This is the word or phrase that may puzzle your reader. This text will be highlighted in red in articles.
- **Definition** - Explain the word or phrase. In an article, the definition appears in a yellow box when the reader clicks a word highlighted in red.

There are two optional settings:

- **Highlight once** - Select to have the word or phrase highlighted only the first time it appears in an article. Repeated highlighting may make the article more difficult to read.
- **Published** - This is selected by default. De-select to have this item not display in the glossary.

Click **Save** to save the new item. Click **Cancel** to abandon your edits and close the form. Click **Preview** to see how the item will appear.

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 **Save**.

Tips:

- 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](#).

Add an Article

If you are in the Public area, the quickest way to [add an article](#) is via the **Manage** menu in the top right of your screen:

- Click on **Manage -> Add Article Here**

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 **Add** drop-down menu in the top right of the screen and choose **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 **Save**.

Tips:

- If you have a number of articles to add from another database, say, you may want to [import articles](#) instead of adding them.

Single Sign On

Using SAML SSO Authentication

Security Assertion Markup Language (SAML) is a standard for logging users into applications based on their sessions in another context. This single sign-on (SSO) login standard has significant advantages over logging in using a username and password. SAML is very powerful and flexible, but the specification can be quite a handful.

Steps to enable SAML SSO Authentication

- See [this article](#) for details

Tracking logins

You can see how your [remote authentication](#) works in the KBPublisher login logs, located under **Logs > Logins**.

For debugging, the most recent remote 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*

The following steps assume that you have an account with a supported identity provider. You need to know the SAML Login URL and have the x.509 certificate supplied by your identity provider. You should also be familiar with the format of the SAML identity response from your SAML provider.

Enabling SAML authentication

1. As a user with administrator privileges, go to **Settings > Authentication Provider**.
2. On the **SAML** tab, check **Enable Single Sign-On**
(make sure that `$conf['auth_remote']` in the file `admin/config.inc.php` is set to 1)
3. Select an **Authentication Mode**, which defaults to *Only SAML Authentication allowed*. The available options are:
 - **Both built-in and SAML Authentication allowed** - User will be able to log in to KBPublisher using SSO and/or built-in authentication.
 - **Only SAML Authentication allowed** - User can only log in using SSO.
 - **Only SAML Authentication allowed, try auto authentication** - User can only log in using SSO and, if possible, auto-authentication on the SAML server will be applied.
4. Enter the following SAML Configuration settings:
 - **Name** - The name for your SSO provider, to be presented on the login page.
 - **Issuer** - Unique identifier for your Identity Provider (typically a URL). In some cases, this is called the Entity ID.
 - **Single Sign-On Service Url** - The SAML Login URL where the Controller will route Service Provider (SP)-initiated login requests. This is required.
 - **Single Logout Service Url** - The URL where the Controller will redirect users after they log out. If you do not specify a logout URL, users will get the KBPublisher login screen when they log out.
 - **Single Sign-On Service Binding** and **Single Logout Service Binding** - You can change the binding for login and logout URLs. Defaults to HTTP-Redirect. The other option is HTTP-POST.
 - **Public X.509 Certificate** - The x.509 certificate from your identity provider configuration.
5. In the **SAML User Mapping Fields** settings, specify how SAML-authenticated users are identified in the KBPublisher Controller:
 - **Remote User Id** - Unique identifier for the user in the SAML response. This value is responsible to identify user in authentication requests. It defaults to the SAML NameID element.
 - **First Name** - The first name for the user corresponding to the KBPublisher First Name field. Given the sample response, this value would be `User.firstName`.
 - **Last name** - The last name for the user corresponding to the KBPublisher Last Name field. Given the sample response, this value would be `User.lastName`.
 - **Email** - The user's email address, corresponding to KBPublisher email field. The value must be unique among all SAML users. Given the sample response, this value would be `User.email`.
 - **Username** - This value corresponds to the KBPublisher username field. The value must be unique among all SAML users. Given the sample response below, the value for this setting would be `User.email`.

SAMPLE RESPONSE

```
<saml:AttributeStatement>
...
<saml:Attribute Name="User.OpenIDName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">adynamo</saml:AttributeValue>
</saml:Attribute>
...
<saml:Attribute Name="User.firstName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">John</saml:AttributeValue>
</saml:Attribute>
<saml:Attribute Name="User.lastName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">Doo</saml:AttributeValue>
</saml:Attribute>
<saml:Attribute Name="User.email" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="xs:string">John.Doo@example.com</saml:AttributeValue>
</saml:Attribute>
...
</saml:AttributeStatement>
```

6. To map SAML group attributes to KBPublisher privileges and roles, configure the **SAML attribute for Privileges** and **SAML attribute for Roles** settings. The settings you use depends on the structure of the SAML group attribute in the response.

Note: You can skip this step. If you leave these settings empty they will never be rewritten on user login. You can assign required privileges and/or roles later in KBPublisher.

1. Click the ellipsis button in the **SAML attribute for Privileges** field to open the Group-to-Privilege Mapping dialog box.
2. Enter the *SAML group attribute name*, the *SAML group attribute value*, and choose a *KBPublisher privilege* to map to. In the sample response provided below, we map group `User.group` with value `Editor`.

3. Click **Add**.
4. When you have added all mapping rules, click **Done**.

SAMPLE RESPONSE

```
<saml:AttributeStatement>
...
<saml:Attribute Name="User.OpenIDName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">adynamo</saml:AttributeValue>
</saml:Attribute>
...
<saml:Attribute Name="User.group" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">Editor</saml:AttributeValue>
</saml:Attribute>
...
</saml:AttributeStatement>
```

Attention: If you map SAML groups to KBPublisher privileges, all matched users will be assigned the specified privilege. If you do not have an Unlimited license and the number of allowed staff users is exceeded, the privilege will not be assigned to the user.

Use the same steps to map **SAML attribute for Roles**.

7. Set up **Service Provider** values.
 - **Metadata** - Use this information to register the Knowledgebase with your identity provider.
 - **Public X.509 Certificate** - If your identity provider requires signing and/or encryption, copy the contents of your certificate and paste it here.
 - **Private Key** - If your identity provider requires signing and/or encryption, copy the contents of your private key and paste it here.
 - **Signing algorithm** - Select a signing method for all SAML requests.

Additional configurations

- **Rewrite user on login** - This is the time, in seconds, to rewrite user data on login. Enter *0* to disable updates to user data on login. Enter *1* to rewrite user data on every authentication request.
- **User account info** - This field indicates whether or not the user is able to update his account info. Available options include:
 - **0** - OFF, user can't update his account info
 - **1** - ON, user can update his account info
 - **2** - AUTO, depends on other remote settings

[Important] Note about Remote User ID mapping when switching authentication

If you are switching between **LDAP** and **SAML** authentication, make sure that the Remote User ID mapping value remains the same. If it differs, a new user will be created in KBPublisher.

For example: Using **LDAP** authentication and mapping Remote User ID to "uid", User A is "user-a". If there's a switch to SAML authentication, the Remote User ID should be the same for this user. By default, **SAML** uses the NameID attribute. Therefore, NameID for this user should be "user-a".

Another option is to reset this field in the database. If this field is reset, you do not need to retain an identical value for Remote User ID. Instead, users will be identified by their email address, so you must have the same email for the user. To reset the field, run the below SQL:

```
UPDATE kbp_user SET imported_user_id = NULL;
```

Configuring OneLogin as an Identity Provider

1. Log into your OneLogin account.
2. Go to the "Apps" section and then click the "Add app" button.
In the filter box type "SAML" and select the "SAML Test Connector (IdP w/attr)" application.
Change the display name of your app if you wish and click "Save".
3. In your KBPublisher administrator area go to Settings -> Authentication Provider -> SAML.
Find the "Service Provider" section and open the "Metadata" window.
On the Configuration tab of your Onelogin app, match the following settings:
Audience: [Entity Id]
Recipient: [Entity Id]
ACS (Consumer) URL Validator: .*
ACS (Consumer) URL: [Assertion Consumer Service URL]
Single Logout URL: [Single Logout Service URL]

Click on the "Save" button.
4. KBPublisher settings for attributes names default to Onelogin attributes, but you might need to ensure they are equal.
5. Go to the "SSO" tab, then click on the "View Details" link at the "X.509 Certificate" field.
Copy the certificate contents and paste it into the "Public X.509 Certificate" window in KBPublisher.
Copy the values of "Issuer URL", "SAML 2.0 Endpoint (HTTP)" and "SLO Endpoint (HTTP)" and paste them into the corresponding KBPublisher fields as shown below.
6. If you don't already have a user on OneLogin go to the "Users" tab and add one.
Go to the "Applications" tab on the user page and assign the application to him.
7. On your KBPublisher settings page click the "Test / Debug" button.
If it works, you'll see a greeting message.

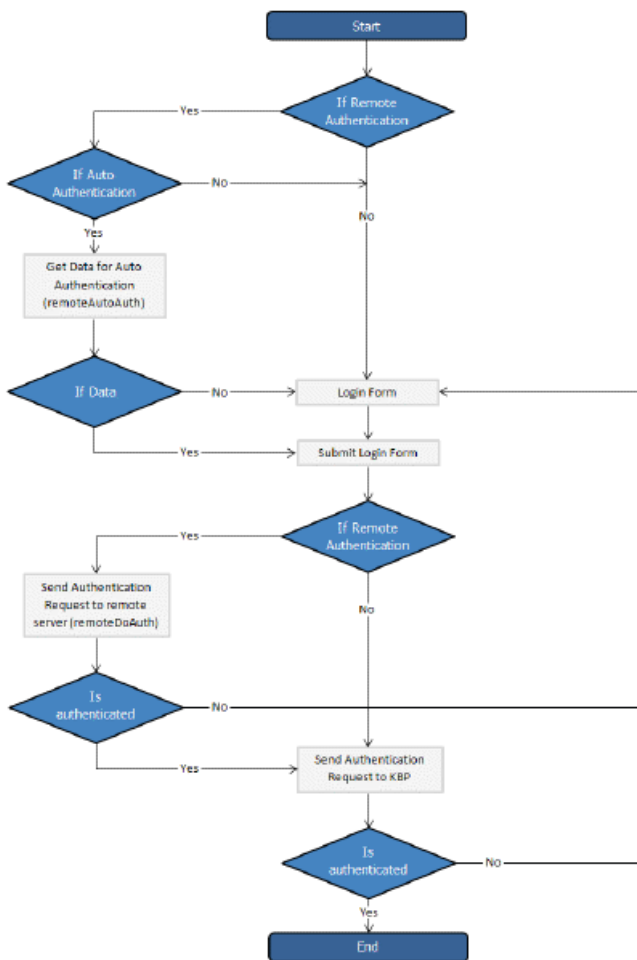
LDAP authentication allows you to integrate your organization's authentication system with KBPublisher. Configuration requires only a few simple steps.

Steps to enable LDAP Authentication

- See [this article](#) for details

Quick summary of the process

- End user goes to site
- User fill the login form
- Remote Authentication checks for valid user credentials
- KBPublisher authenticates the user



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*

LDAP Authentication is accessible by administrator in **Settings > Authentication Provider > Ldap** tab in **Admin Area**.

Settings

- Check **Enable LDAP Authentication** checkbox.
(make sure that `$conf['auth_remote']` in the file `admin/config.inc.php` is set to 1)
- **LDAP Authentication.** To enable LDAP authentication check **Enable LDAP Authentication**
Make sure that the config variable `$conf['auth_remote']` in the file `admin/config.inc.php` is set to 1;
You can disable LDAP authentication by setting `$conf['auth_remote'] = 0`.
- **LDAP Options.** Identify host name of your LDAP server and the port for the protocols. The default port for LDAP over SSL is 636, for LDAP over TCP, UDP, or for TLS it is 389. You can specify Base DN for LDAP server and user DN and password. Leave **User DN** and **Password** fields empty for anonymous binding.

In order to use nested groups in Active Directory, you should set the LDAP membership attribute to `member:1.2.840.113556.1.4.1941:`
This is a special rule to perform a recursive group search.

For more information, see the following:

[https://msdn.microsoft.com/en-us/library/aa746475\(v=vs.85\).aspx](https://msdn.microsoft.com/en-us/library/aa746475(v=vs.85).aspx)
<https://blogs.technet.microsoft.com/...explore-group-membership-with-powershell/>

- **Configuration.** Set up the IP addresses for local authentication, specify whether to rewrite user data on login in "**Rewrite user on login**" field:
0 - once user created the data in KB will never be updated; 1 - on every authentication request, the user data in KB will be rewritten. You also can set up the options for updating user profiles and resetting password.
- **Group Mapping.** Here you can set up LDAP group mapping behavior. LDAP groups can be either static or dynamic. A static group entry contains a list of its users. A dynamic group is where the user entry contains a list of groups it belongs to.
- **User Mapping Fields.** Define the LDAP attributes - first name, last name, email, remote user id and attributes for privileges and roles (optional). In your expression use the round bracket to identify the specific characters to parse out the records as the field.
For user's privilege and role mapping you can give users privileges based upon their group attributes. Click [...] button to map LDAP groups to KBPublisher Privileges and/or Roles.

Please note, if you set mapping LDAP groups to the KBPublisher privileges, all matched users will be assigned the specified privilege. In case you do not have an Unlimited license, the number of allowed admin users could be exceeded and privilege will not be assigned to user.

Important! If you leave this field blank, roles and privileges assigned for users in KBPublisher will not be updated upon login.

- **Test / Debug Options (optional).** Set up data to test / debug authentication for actual LDAP user.

Tip: You can disable LDAP authentication by setting `$conf['auth_remote'] = 0`; in file `/kbp_dir/admin/config.inc.php`

Using Remote Authentication

Remote authentication allows you to integrate your organization's authentication system with KBPublisher.

Before you start:

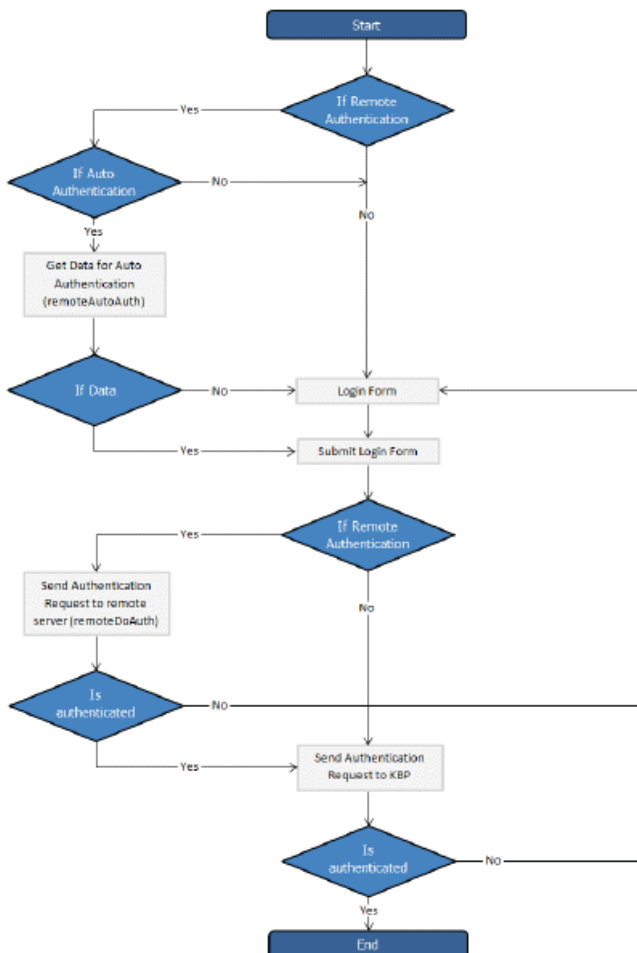
- We assume that you have some experience with PHP and with the system you are connecting to.

Steps to enable Remote Authentication

- Click on **Settings -> Authentication Provider -> Remote**
- Check **Enable Remote Authentication** checkbox (make sure that `$conf['auth_remote']` in the file `admin/config.inc.php` is set 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*

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.

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.

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.

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.

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**, 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	
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 they 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



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 and above

Add a Local File

When you want to add files to the knowledgebase, you can upload files from your local computer, or you can link to files that are already on your server. In KBPublisher such files are known as "local files". If the file already exists on the server it saves space to reference it rather than uploading a second copy specifically for the knowledgebase. By adding a reference to a file that may be also be available through your corporate website or some other site (forms, disclaimers, fair-use and privacy policies, product disclosure statements, catalogues, printable manuals, and so on) you can make the knowledgebase richer and more useful without taking up additional space.

To add a local file (a reference to a file already on your server):

- Select the **Files** menu
- Choose the **Add Local Files** tab to display the **Local add** form:

Files | Drafts [new] | Categories | **Add Local Files** | Directory Rules

Add* local files (which are already on server) here.
Prepare some folder(s) with all required files. Denied or allowed extensions rule will be applied (see "Settings" tab). Files will not be copied or moved.
* Adding a file this way means that a record with the file path is created in the database, so you should not move or delete files on the server after adding it here.

Local add:

Directory: *

File(s):

Category: *

Title:

Description:

Author:

Private: Read Write

Schedule: Yes

Status:

Complete the form's fields:

- **Directory** -- Enter the name of the directory on your server which holds the files you want to link to. Then click **Get files** to display the file or files.
By default all files in the directory are selected. Un-check the check box for each file you do not want to link to.
- **Category** -- Add one or more categories for the files by clicking the + icon to the right of the Category field and selecting from the list of categories provided.
- **Title** -- Add a title. If you are linking to more than one file in this operation, all files will have the same title.
- **Description** -- Add a description. If you are linking to more than one file in this operation, all files will have the same description.
- **Author** -- By default you are identified as the author of the files. Click the **Delete** link to the right of your name to remove it.
- **Private** -- You can opt to restrict either or both **read** and **write** access to the files. If you check either check box another field appears where you can specify which roles users must have to be able to read and/or update the file.
- **Status** -- You can set the file status as **Published** or **Unpublished**.

When the form is complete, click **Add files** to add the files to the list on the **Files** tab.

If you have the correct permissions, you can add the files as drafts. Click **Add as Drafts** to add the files to the list on the **Drafts** tab. Use this option for files that you do not want to publish yet, or for files that require further review or approval before becoming available.

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.
- Files listed are only those in the directory specified. It does not find files in sub-directories within the current directory.
- 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.

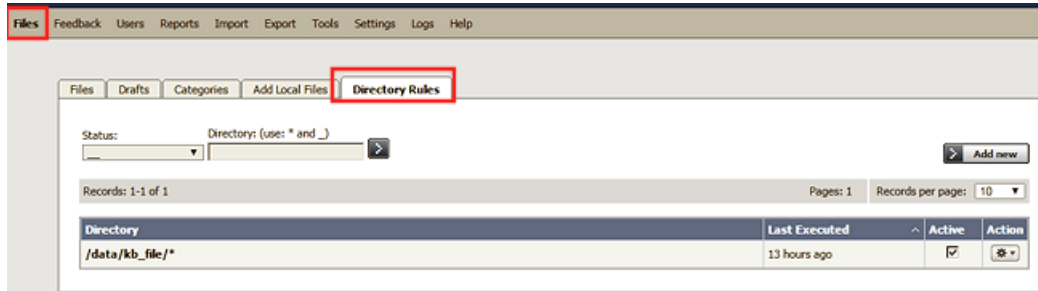
Automatically Add Local Files

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 in KBPublisher links to any new files.

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

Note: this option doesn't move files, it adds links in KBPublisher to files on your server. If you move a file from the location KBPublisher linked to, the links to that file in the knowledgebase will be broken.

To see and manage your directory rules, select **Files** in the main menu, and then the **Directory Rules** tab:



If you have a long list of directory rules, you can filter the list by rule status or by the directory the rule applies to, using the fields above the list of rules.

Managing directory rules

Check the check box in the **Active** column for a rule to enable that directory rule. Un-check the checkbox to disable the rule.

Click the gear icon in the **Action** column of a row to perform one of these actions on the directory rule in that row:

- **Edit** - update the rule's information. The fields are the same as when you add a new directory rule--see the descriptions below.
- **Delete** - delete the directory rule.

Adding new directory rules

To add a directory rule, click the **Add New** button. Complete the form that appears:

Rule options:

- **Directory** - Provide the directory on the server that the directory rule should monitor. The directory name should be the [full server path](#). Click **Read directory** to verify that the path is correct. If the path is correct, you see a list of all files in that directory.
- **Parse child directories** - Check this option to have the rule monitor all sub-directories in the directory. This is selected by default.
- **Description** - A description is not required, but you can add one to describe the files that normally appear in the directory, or information about the directory rule that may be useful to other team members.
- **Active** - This field is selected by default, and once you save the new directory rule it will run at the next scheduled opportunity. Un-check this

check box to disable the rule (you can also enable and disable a directory rule from the full list of rules, as described above).

File options:

- **Category** - Add one or more categories to which the links to the new rules this directory rule finds will be added. Click the + icon to the right of the field to add a category.
- **Author** - By default the current user's name appears in this field, and will be associated with the link to any file the directory rule adds to the knowledgebase. You can select a different user's name as the author, or opt to have no author name.
- **Private** - By default the links the directory rule creates are public. Check one or both check boxes to control read and write access to the linked file to users with the roles you specify. See [private read and write](#).
- **Status** - By default, files are set to a status of **published**, but you can change this to **unpublished**.

To test the settings click **Test**.

Click **Save** to save the new directory rule. Click **Cancel** to abandon your edits and close the form.

Exporting

Enable Exporting to PDF

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

- Install a program called **WKHTMLTOPDF** (recommended) or **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

Using WKHTMLTOPDF (recommended)

- WKHTMLTOPDF is available from <https://wkhtmltopdf.org>
- Download it and install it

Update the setting to point to WKHTMLTOPDF

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

- You can find this under Settings menu, **Settings -> Plugins -> Export -> WKHTMLTOPDF installation path**
- Make sure the **WKHTMLTOPDF 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.

Test WKHTMLTOPDF from command line

To convert a single web page type:

```
$/path_to_wkhtmltopdf/wkhtmltopdf input.html output.pdf
```

Test using PHP and included test file:

```
$ php -r "exec('/path_to_wkhtmltopdf/wkhtmltopdf http://path_to_kbp/admin/extra/plugin/export2/template/export_test.html output.pdf');" >>
```

Using HTMLDOC

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

- HTMLDOC is available from <https://www.msweet.org/projects.php?Z1>
- 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 -> Export -> 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.

Test HTMLDOC from command line

To convert a single web page type:

```
$/path_to_html/doc/html/doc --webpage -f output.pdf filename.html
```

Test using PHP and included test file:

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

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 -> Export** tab
- Paste your key into the **Plugin key** field
- **Save.**

Tip:

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

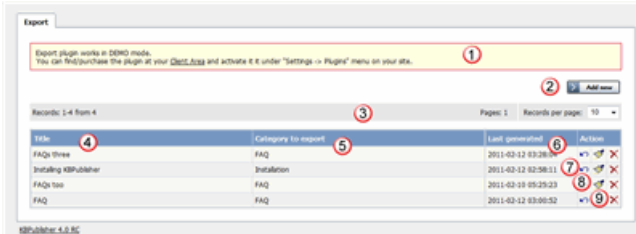
This functionality works in version 4.0 and above

The Export to PDF and HTML Screens Explained

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

The Summary screen

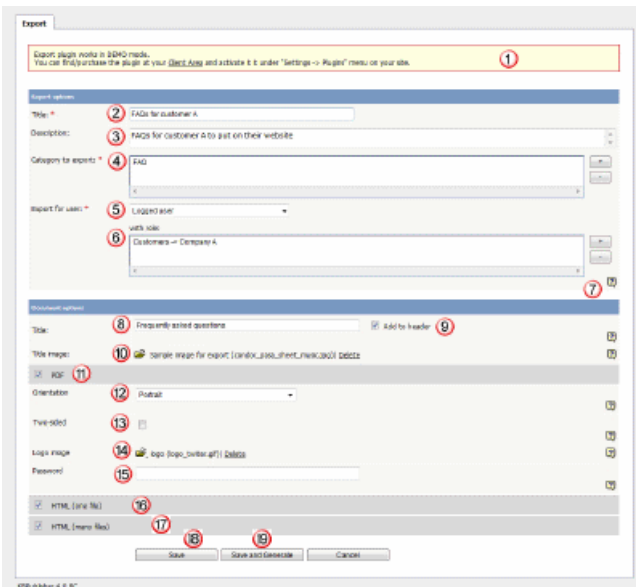
When you first enter the screen you see a summary of any current exports that have been set up.



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



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.

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 -> PDF/HTML** tab
- 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

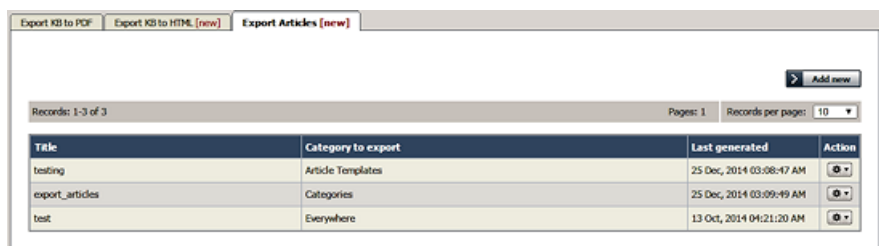
Tip:

- 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 and above

Export Articles to CVS, Excel or XML

To find the Export Articles tab, select **Export** from the menu bar. Then select **Export Articles** from the three tabs available:



The screenshot shows a web interface with three tabs: 'Export KB to PDF', 'Export KB to HTML (new)', and 'Export Articles (new)'. The 'Export Articles (new)' tab is active. It features a table with the following data:

Title	Category to export	Last generated	Action
testing	Article Templates	25 Dec, 2014 03:08:47 AM	[Action icons]
export_articles	Categories	25 Dec, 2014 03:09:49 AM	[Action icons]
test	Everywhere	13 Oct, 2014 04:21:20 AM	[Action icons]

What does export articles do?

The Export Articles tab lets you export the articles and information about the articles, in spreadsheet form. You could then review and work with the material in Excel or any other spreadsheet tool, or use the file to import the data into a database.

To manage your exports

The tab displays a list of your export templates. Click the **Action** button to the right of an entry for the action options:

- **Details** - Review the details of exports using this template, including the date and status of the most recent export.
 - Click **Generate** beside any export type to regenerate the export files.
 - Click the export type name (CSV, EXCEL, or XML) to download a ZIP file of the exported files.
 - Click **Update** to move from here to the **Update** action, or click **Back** to return to the list of export templates.
- **Update** - Update the selections or description for the export, following the information for creating a new export, below. Click **Save** to save your changes; click **Save and Generate** to export the data for this export again; click **Cancel** to abandon your changes and close the form.
- **Delete** - When you select this option, a confirmation form appears to make sure you really want to delete this export template. Click **OK** to remove the record; click **Cancel** to keep the template and end the process.

To create a new export template

To create a new export template, click **Add new** to open the **Export options** form. Complete the form to export the articles you want, and the metadata about them you select.

- **Title** - Required. Provide a title for this template.
- **Description** - Optional. Provide a description for this template.
- **Category to export** - You must select at least one category. Click the **+** button and select from the options available. If you need to export all KB, choose "All categories (All KB)".
- **Export for user** - Some articles may be invisible to certain user types. Select the user type to filter the categories you chose to include just the content that user type can see. Options are:
 - **Admin User** - Export includes all content in the selected categories. The system ignores any private attributes for the user.
 - **Not logged in user** - Export includes content a user who is not logged in can see.
 - **Logged in user** - When you choose this option you can specify roles to limit the export to the content a user with a selected role can see. To add a role, click the **+** button and select from the options. If you specify no role, then the export includes all content a logged-in user can see.
- **Columns** - Select the columns to include in the export by dragging the names of the columns you want from the "Columns not included in table" list to the "Columns included in table" list. To remove columns from the export, drag the column names back to the left-side list. You can rearrange the columns in the export table by dragging the column names higher or lower in the right-side list.
- **Encode images** - Select this option to encode any images included in the export in base64 format.
- **Export published articles only** - Select this option to include in the export only published articles.
- **Document options** - You can select one or more of the export options: CSV, XML, and EXCEL.
 - For CSV you can accept the defaults for the following fields, or edit the field contents to suit your needs:
 - **Fields terminated by** - Default is a comma (,).
 - **Fields optionally enclosed by** - This allows you to include the field terminator, such as a comma, within the text of a field. The default is double quotation marks (").
 - **Lines terminated by** - The default is \n.
 - **Include field names row** - Select to include a header row of all field names.

Click **Save** to save this template; click **Save and Generate** to save the template and generate files in the formats you have selected with the required data; click **Cancel** to close the form without creating a template.

Generate file from export template

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

- Click on the **Export** menu
- Click on the tab with the required export format to display the export templates you have for that format.
- For the template you want to use, click the icon in the **Action** column. Then select **Details**.
- In the **Details** screen you can review information about the template and, in the **Downloads** row, information about files it has been used to generate. This row has different sections depending on the export format:
 - **Export KB to PDF** - one section
 - **Export KB to HTML** - a section for single-file export and another for multiple file export.
 - **Export Articles** - up to three sections for Excel, CSV and XML export, depending on how the template is set up.
- If articles have already been generated, you can click the file type to download them.
- Click **Generate** for the format in which you want to generate or regenerate documents. If there is an export date, it updates to reflect the date and time of this export..
- Click the file type to download the newly-generated documents.

This functionality works in version 4.0 and above

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 and above

Export articles to PDF 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.

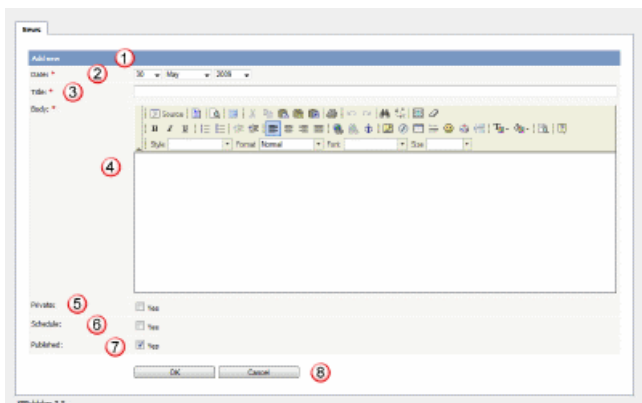
There are some limitations with the demo model:

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

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 **Save**.

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 the Options icon under **Actions** to display the dropdown list, and then click 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 **Delete** from the options dropdown menu.

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.

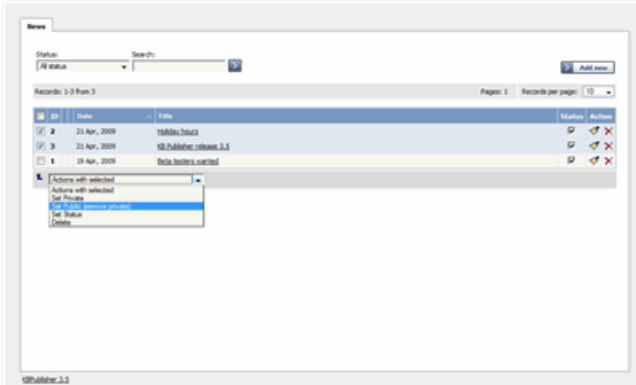
This functionality works in version 3.5 and above

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.

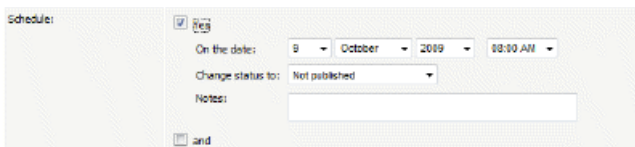
For example, suppose your company is closed for the Christmas/new year holiday period—say it is closed from 12 noon on 24 December and re-opens at 9 am on the 2nd of January.

- 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

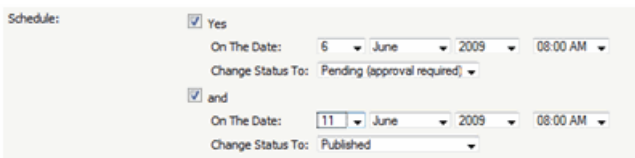


The screenshot shows a 'Schedule' section with a checked 'Yes' checkbox. Below it, there are fields for 'On the date:' set to '9 October 2009' at '08:00 AM'. A 'Change status to:' dropdown is set to 'Not published'. There is also a 'Notes:' text input field and an 'and' checkbox which is currently unchecked.

- 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 'Yes' checked. The first scheduling option is for '6 June 2009' at '08:00 AM' with 'Change Status To' set to 'Pending (approval required)'. The 'and' checkbox is checked, and a second scheduling option is shown for '11 June 2009' at '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

Articles

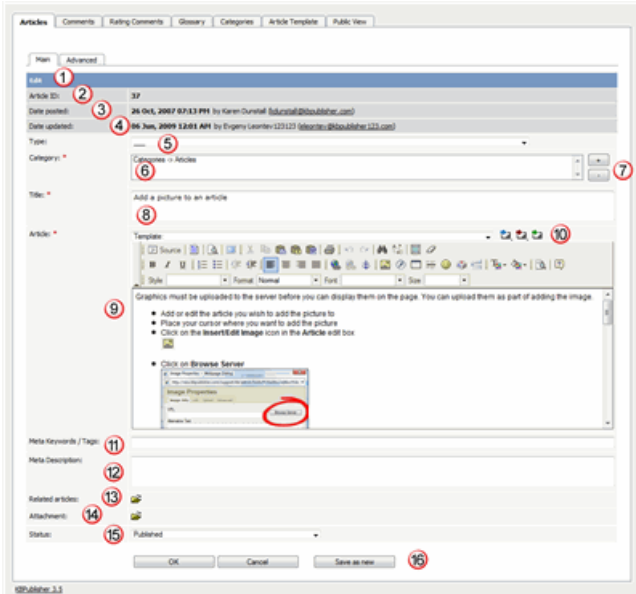
Articles

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

The Article Input Screen Explained

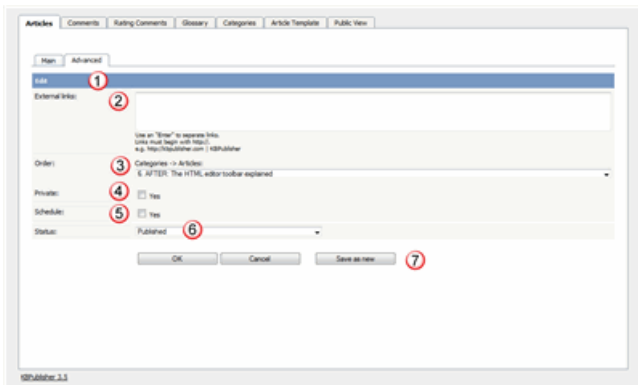
The article screen is divided into two tabs. A **Main** tab, which is what you use to create the article, and an **Advanced** tab, where you set external links, the order of the article inside a category and whether or not the article is published. The Advanced tab also allows you to schedule articles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

Designating 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.

Quick add or update an Article

The **Quick Add/Update** feature is a shortcut that will significantly reduce the time it takes for you to add or update an article to Knowledgebase. When you initiate this feature an article template will be presented to you and the inline HTML editor functions will be available so that you can create text, customized to your specifications.

To add or update an article, you must be an authorized user.
Sign in to your Knowledgebase.

Quick Add

1. Click on **Manage** in the upper right corner.
2. From the drop down list select **Add Article Here**.
3. The first screen will ask you to select an appropriate category to publish an article.
4. Once you select a category, a new screen template will be displayed which will enable you to add additional information about your article.
5. When you are done simply click Publish button on the lower right hand side of the screen.

Quick Edit

1. Click on the article that you want to edit.
2. With the article open, click **Admin Tools** menu icon on the right of the article title or on the right below the article, from the drop down list select **Quick edit**.
3. After making your changes simply click on the **Save** button to save the changes you made to the article.

Add an Article

If you are in the Public area, the quickest way to [add an article](#) is via the **Manage** menu in the top right of your screen:

- Click on **Manage -> Add Article Here**

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 **Add** drop-down menu in the top right of the screen and choose **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 **Save**.

Tips:

- 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 the Options icon under **Actions** to display the dropdown list, and then click Edit.

The other way is to

- Click on the article to view it
- Click on **Quick Edit** to update article in place or click **Edit Article** to open article for update in Admin Area

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 **Move to Trash** from the options drop down menu.

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
- Choose **Move to Trash** 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.

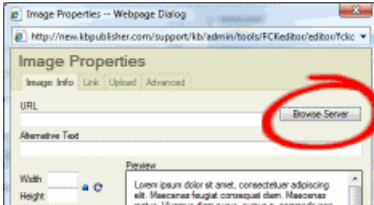
Add a Picture to an Article

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.

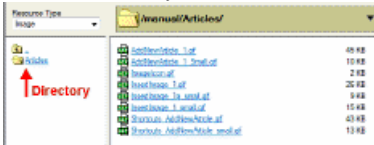
- Add or edit the article you wish to add the picture to
- Place your cursor where you want to add the picture
- Click on the **Insert/Edit Image** icon in the **Article** edit box



- Click on **Browse Server**

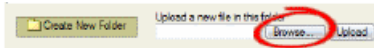


- Go to the directory on the server where the image is now, or where you want to place it if you haven't uploaded it yet

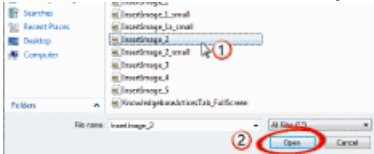


If you have not yet uploaded the picture

- 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**

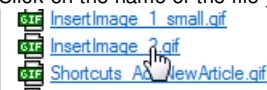


- This brings you back to the upload screen. Click **Upload**



- 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 the HTML editor, it will added to cursor position of an editor.

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 a Category screen
- Select a category by using the text entry field at the top of the screen. You can start typing a category name to filter the category list. You can select multiple categories.
- Click **OK** to save your changes and exit the Assign a Category screen.

On the Assign a Category screen you can also:

- Unassign categories from this article by clicking the **x** button.
- Drag and drop categories into your preferred assignment order.
- Select which category the article will be published in, and which categories the article will be listed in.

Tips:

To quickly assign a category without opening the Assign a Category screen you can:

- Start typing a category name and then select the category.

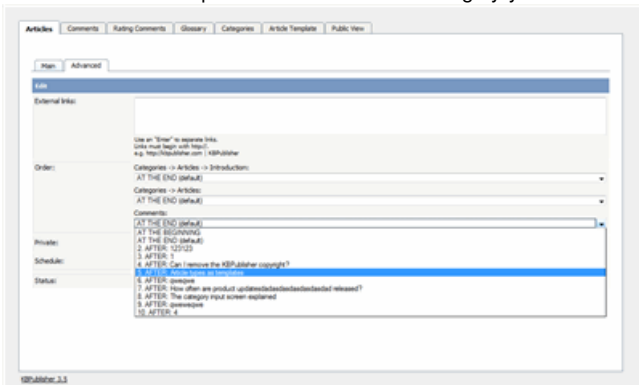
To quickly unassign a category without opening the Assign a Category screen you can:

- Double-click on a category in the **Category** box.
OR
- Click on a category in the **Category** box, and then click the **minus (-)** button.

To order the category


When you exit from adding the category you return to the article screen.

- Click on the **Advanced** tab
- This will now contain a list of each category you have assigned, 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 and exit from editing the article, or if you wish to continue editing the article, return to the **Main** tab,

To embed a link to an article

- Add or edit the article to which you wish to add the link
- Highlight the text to be linked
- Click on the plus icon in **Related Articles** field or use the Link to article icon  in HTML editor
- In the popup find an article you wish to link to
- Click on the **Insert** icon located in the **Action** column

To attach a link to an article (Related Articles)

- Add or edit the article to which you wish to add the link
- Click on the plus icon in **Related Articles** field
- In the popup find the article you wish to link to
- Click on the **Attach** icon located in the **Action** column

To embed a link to a linked article

- Edit the article to which you wish to add the link
- Highlight the text to be linked to
- Under **Related Articles** click on **Link** icon, located to the right of the article title

Tip

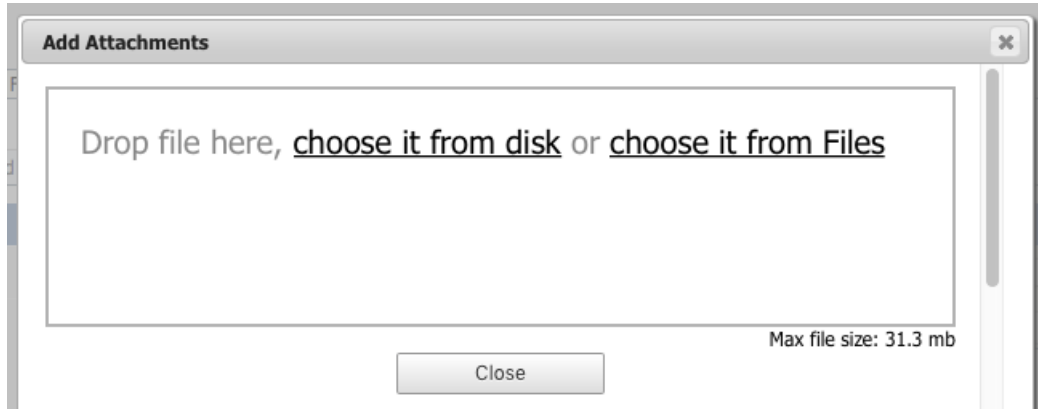
- When you add a link to another page, the page that you link to also includes a link back to this page under the '**Also Read**' heading by default. In the editor, you can turn this back link off by removing the tick from the **cross reference** checkbox under **Related Articles**, located to the right of the article title.

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

The New Attachment functionality allows you easily attach files and embed links to files in your article. It allows you to attach up to 5 files at once by either dragging the file, choosing a file from your local disk or selecting it from a list of already uploaded files.

Attach a file to an article


- Add or edit the article to which you wish to attach a file
- Click the plus icon in the **Attachment** section
- The popup window **Add Attachments** will open like this:



- In this window you can drag and drop a file, choose a file from your local disk or select it from already uploaded files
- If you chose from uploaded files, find the file you want to attach in the popup window and click on the **Attach** icon

Note: When you upload new files using the **Add Attachment** window, the files will be posted to the Files module under the **Attachments** category. This category is inactive by default so files will not appear in the Downloads section of your Knowledgebase.

Add an embedded link to a file

- Add or edit the article to which you wish to add the link
- Highlight the text to be linked
- Click on the **Link to file** icon  in HTML editor
- Find the file you want to link to in the popup window and click on the **Link** icon on the right

Embed a link to an attached file

- Open the article which has the attached file
- Highlight the text to be linked
- Click on **Link** located to the right of the file name under **Attachments**

Tips

- 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.

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 unlimited number of 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, use All to keep unlimited number of revisions.

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.

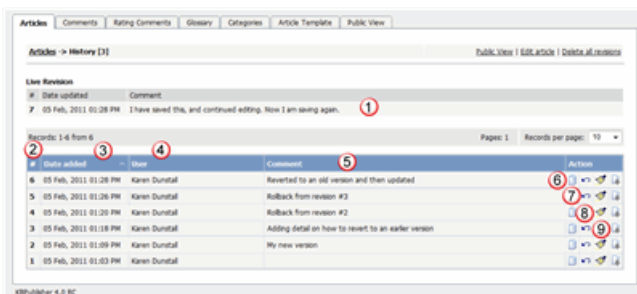
Tip

- 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 and above

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 and above

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

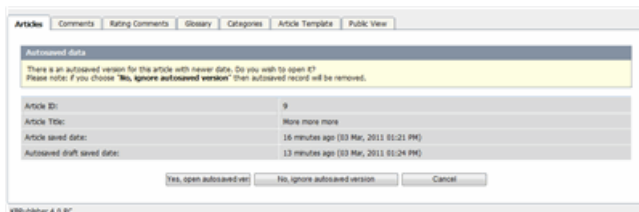
- Log on and go to the **Admin** area
- Click on the **Articles** menu
- Choose the **Articles** tab
- If there are any unsaved autosaved documents you will see a note at the top of the articles tab telling you that there are unsaved drafts.
- Click on the **click here** link to view the autosaved document(s).



- Only the author can see the autosaved document

If you are editing an existing article

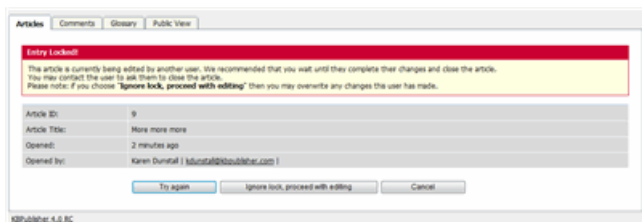
If you open an existing article for editing and for some reason the article was not saved correctly, or an error occurs on the save, then when you next open the article for editing you will see the following message:



- 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.

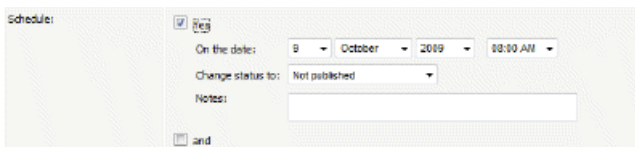
For example, suppose your company is closed for the Christmas/new year holiday period—say it is closed from 12 noon on 24 December and re-opens at 9 am on the 2nd of January.

- 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

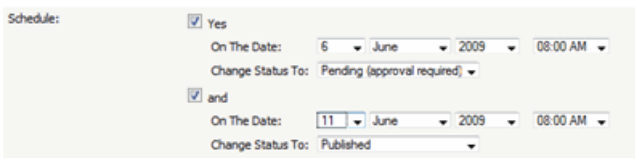


The screenshot shows a 'Schedule' section with a checked 'Yes' checkbox. Below it, there are fields for 'On the date:' set to '9 October 2009' at '08:00 AM'. A 'Change status to:' dropdown menu is set to 'Not published'. There is also a 'Notes:' text input field and an 'and' checkbox which is currently 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 'Yes' checked. The first scheduling option is for '6 June 2009' at '08:00 AM' with 'Change Status To' set to 'Pending (approval required)'. The 'and' checkbox is checked, revealing a second scheduling option for '11 June 2009' at '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.

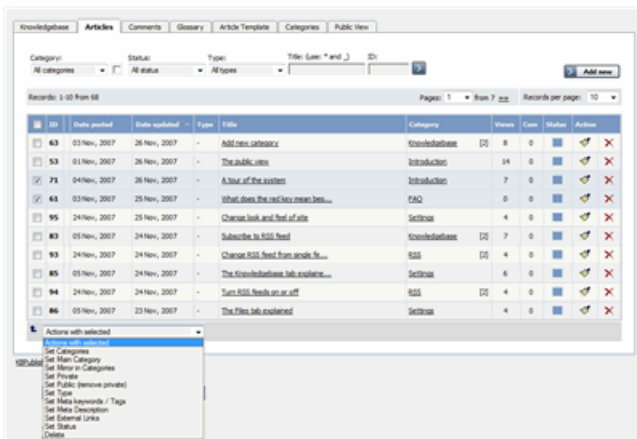
- Click on the **Feedback** menu
- Click the Options icon under **Actions** to display the dropdown list, and then click **Place question in KB**
- This brings up a new article screen for you to start creating the new article. The text in the email is listed in the article title
- [Create the article](#) 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 they 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



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.

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:

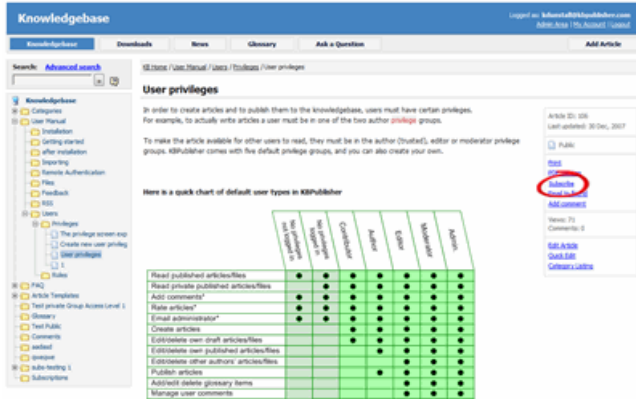
- Edit the article
- Click on the **Advanced** tab
- Choose **Private Read** if you wish to restrict who can read the article or wish to force users to log on to read it. Choose **Private Write** if you wish to allow everyone to read the article but only writers in a specified role to edit it. Choose 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**.

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 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

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

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 **Tools** 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 **Save**.

Add new article type

You can create your own article types:

- From the **Tools** 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 an *explanation*, 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 **Save**.

Featured Articles

The **Featured** tab lets you select articles you want to highlight. You can include articles in the **Featured** section of your index page, or in the featured section of a category, or both.

To access the **Featured** tab click **Articles** from the main menu bar and select **Featured** from the tabs displayed:



The list provides the ID and title of each featured article and the number of views the article has had. A star appears in the **Index Page** or **Category Page** columns, or both, to indicate where the article is featured. In the **Category Page** column a number appears beside the star to indicate how many categories feature the article.

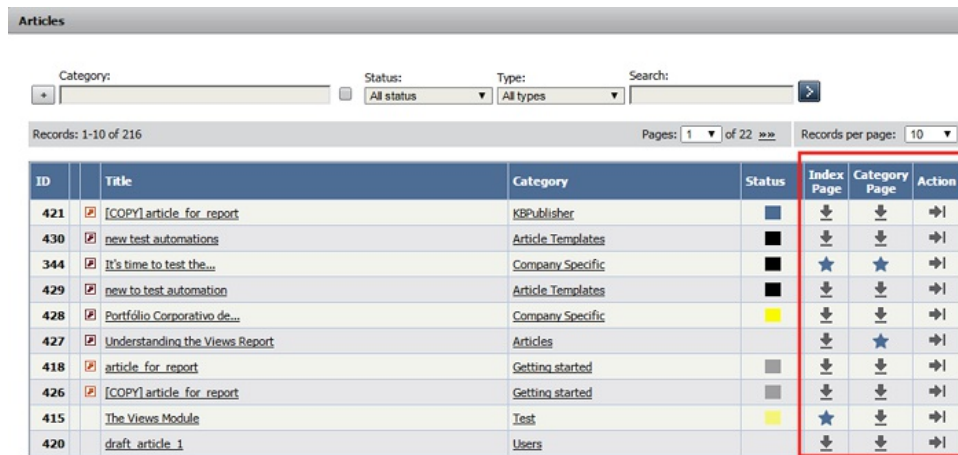
Use the filter at the top of the form, marked in red in the image above, to show only articles that are featured on the Index page, the Company Specific page, or for a particular category. Click the > button to filter the display. Clear the fields and click > again to show all articles.

At the right of each entry is a gear button. Click it to open the **Actions** menu. From this menu:

- Select **Details** to see more about the current article. The display changes to the **Details** sub-tab of the **Articles** tab.
- Select **Edit** to set how the article is featured.
- Select **Remove** to remove the current article from the **Featured** list.

Add an article to the Featured list

To add an article to the Featured list, click the **Add new** button. The popup window appears and shows all the articles available to add to the list.



Use the filter fields above the list and then click the > button to show only articles that match the conditions you set. Clear all fields and click > again to show all articles.

To add an article to the list, select one that does not already have a star in its **Index** or **Category** column. Click the icon to add the article to the list.

Click the icon in the **Action** column to open the edit form for the article. The form is described below.

Edit a featured article

To adjust how an article is featured, click the Action icon for the article and select **Edit**. The Edit form appears:

Clear the check box to remove the article from the **Index Page** display.

You can feature an article on one or more category pages. To add the article to a category page, click the + button to the right of the Category Page field. Select the category you want from the list that appears. To remove the article from a category page, select the category in the Category Page field and click the - button to the right of the field. A confirmation message appears to make sure you want to remove the category.

Click **Save** to save your edits. Click **Cancel** to abandon your edits and close the form.

Remove a featured article

There are three ways to remove articles from the Featured list:

1. Click the **Action** icon for the article you want to remove from the list and select **Remove**.
2. Check the check box at the left of the row for each article you want to remove. Click the **Actions with selected** menu at the bottom of the display, and select **Remove**. Click **OK** to confirm that you want to remove the selected articles.
This option is useful when you need to remove several articles from the Featured list. Check the check box that appears at the top left of the list of articles to select all articles. De-select it to clear all check boxes at once.
3. Click the **Add new** button to open the list of articles as described above. Articles that are featured have a star in either or both of their **Index Page** and **Category Page** columns. Click a star to remove that article from being featured in that page or pages; you can remove the article from one feature and retain it for the other.

Configure display options

To learn more about configuring the display of featured articles, see [The Public Area tab explained](#). See settings "Featured articles" and "Featured articles in a category".


Adding Code Snippets

You may want to add code examples, or snippets, to your knowledgebase article to show your users how to achieve a particular effect or address a common problem. KBPublisher makes this easy by providing formatting tags to put around the example. When your readers look at the article, the example code appears, correctly formatted for the coding language you specify, and highlighted as it would appear in a code editor for that language, in a box to set it off from the rest of the text.

There are two options to add code snippet to an article.

Option 1 - toolbar button

To add code snippets to an article by using the toolbar button:

1. Open the article for editing.
2. Place cursor where you want the code snippet to appear. (You can move the snippet later, if needed.)
3. Click the "Insert Code Snippet" icon in the editor toolbar .
4. In the Code snippet window, select a language and add your code content.
5. Click **OK**.

Example:

```
<?php
$value = 'something from somewhere';
setcookie("TestCookie", $value);
setcookie("TestCookie", $value, time()+3600); /* expire in 1 hour */
setcookie("TestCookie", $value, time()+3600, "/~rasmus/", "example.com", 1);
?>
```

Available Languages

In the Language drop down menu, the following options are available:

- Apache
- Bash
- CoffeeScript
- C++
- C#
- CSS
- Diff
- HTML
- HTTP
- INI
- Java
- JavaScript
- JSON
- Makefile
- Markdown
- Nginx
- Objective-C
- Perl
- PHP
- Python
- Ruby
- SQL
- VBScript
- XHTML
- XML

Option 2 - [code] tag

To add code snippets to an article by using the [code] tag:

1. Open the article for editing.
2. Add opening and closing tags around your code snippet:
[code=XXX] Add your code here. [/code]
3. Replace the XXX with the indicator from the list below for the snippet's coding language.
4. Paste your code between the opening and closing tags.
5. Preview the article to confirm it appears as you want.

Example:

```
<?php
```

```

$value = 'something from somewhere';
setcookie("TestCookie", $value);
setcookie("TestCookie", $value, time()+3600); /* expire in 1 hour */
setcookie("TestCookie", $value, time()+3600, "/~rasmus/", "example.com", 1);
?>

```

Available Languages

Find your snippet's coding language on the left side of any pair. Choose **one** of the entries that appear on the right side. For AS3, for example, you could use "code=as3" or "code=actionscript3".

Code Language	Indicator
AS3	<ul style="list-style-type: none"> actionscript3 as3
Bash	<ul style="list-style-type: none"> bash shell
CSharp	<ul style="list-style-type: none"> c-sharp csharp
ColdFusion	<ul style="list-style-type: none"> cf coldfusion
Cpp	<ul style="list-style-type: none"> c cpp
Css	<ul style="list-style-type: none"> css
Delphi	<ul style="list-style-type: none"> delphi pas pascal
Diff	<ul style="list-style-type: none"> diff patch
Erlang	<ul style="list-style-type: none"> erl erlang
Groovy	<ul style="list-style-type: none"> groovy
JScript	<ul style="list-style-type: none"> javascript js jscript
Java	<ul style="list-style-type: none"> java
JavaFX	<ul style="list-style-type: none"> javafx jfx
Perl	<ul style="list-style-type: none"> perl pl
Php	<ul style="list-style-type: none"> php
Plain	<ul style="list-style-type: none"> plain text

Code Language	Indicator
PowerShell	<ul style="list-style-type: none"> • powershell • ps
Python	<ul style="list-style-type: none"> • py • python
Ruby	<ul style="list-style-type: none"> • rails • ror • ruby
Scala	<ul style="list-style-type: none"> • scala
Sql	<ul style="list-style-type: none"> • sql
Vb	<ul style="list-style-type: none"> • vb • vbnet
Xml	<ul style="list-style-type: none"> • html • xhtml • xml • xslt

Drafts

The **Drafts** module lets users create new articles, or modify existing published articles, without interfering with live publications. Users can create and modify drafts in a separate area until each draft is finished and ready to go live.

The Drafts module lets you require specific contributors to create drafts that must be approved before publication, rather than publishing their material directly.

To learn about creating and managing your drafts, see [Manage drafts](#).

Essential facts about drafts

- Users with admin privileges can create, approve, reject, or delete any draft at any stage in the approval process.
- If a draft has been sent for approval, the author cannot update it until the review is complete.
- Your knowledgebase records approval decisions in a log for future reference.

Drafts and Workflows

When a draft is ready to publish, an approval [workflow](#) can route the document or item to the **assignees**, one or more people assigned to review such material before publication.

Assignees can approve the article for publication or send it back to the author for more work. They can also provide feedback on an article. The feedback is compiled and sent to the person who initiated the workflow.

Possible scenarios when a user adds a draft

1. There is a matching workflow

The author of a draft can save the draft repeatedly while working on it until the material is ready to submit. When the user submits the draft for approval, the workflow assigns it to appropriate assignees. The user has no further access to the draft until it is approved for publication or returned for further edits.

2. There is no matching workflow and the user's privileges do not permit adding articles

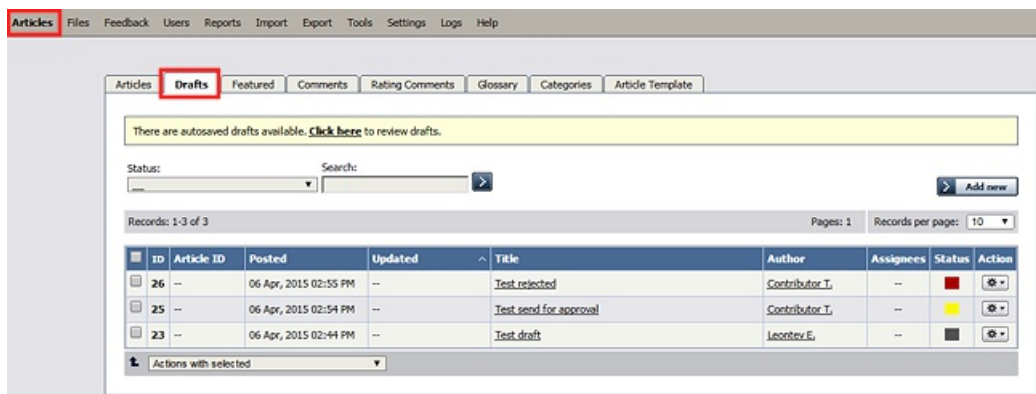
The author of a draft can save the draft repeatedly while working on it. However, the user cannot publish the draft, and there is no way to send the draft for approval.

3. There is no matching workflow, and the user's privileges permit adding articles

The author of a draft can save the draft repeatedly while working on it. When the draft is ready to publish, the user can publish it. Once the draft is published it no longer appears on the list of drafts, and does appear on the list of articles.

Manage Drafts

To manage existing drafts or create a new one, select **Articles** or **Files** from the main menu and select the **Drafts** tab:



The tab lists all existing drafts. If the list is long, use the filter fields above the list to show just the drafts of a particular status, or the drafts with a certain word in their titles.

The **Status** column shows a color for each draft to indicate its status:

- gray = in progress
- yellow = waiting for approval
- red = rejected

Click the gear icon in the **Action** column for a draft to perform one of these actions:

For drafts of **articles**:

- **Approve** - Appears if draft requires approval and you are an assignee (are allowed to approve or reject the draft).
- **Preview** - Display a preview of the draft to review.
- **Details** - Display details about the draft.
- **Edit** - Open the draft for editing.
- **Delete** - Delete the draft.

For drafts of **files** some extra options available:

- **Open** - Open the file in a browser if possible.
- **Download** - Download the file to a location on your computer.

Adding a draft

To add a draft of an article or file, click **Add new** on the relevant tab and complete the form that appears.

- For a description of the form for adding a draft of an article, see [Add an article](#).
- For a description of the form for adding a draft of a file, see [Add a file](#).

Note: When you add a draft there is no **Status** field. The status is set when the item is published. You can define article status by selecting **Tools** from the main menu, and then **Lists >> Article statuses**.

Approve a draft

If you are an assignee for a draft in its current workflow step you can

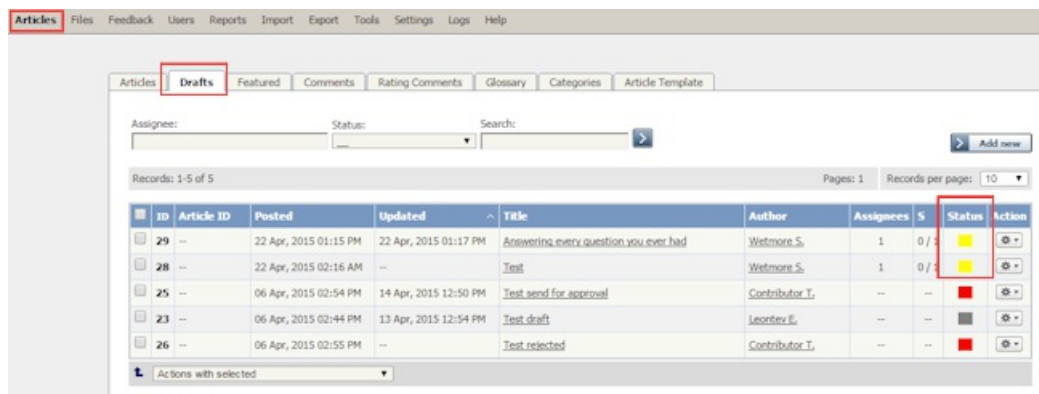
- [approve the draft](#) as-is and either publish it or move it to the next workflow step.
- edit the draft and save your changes before [approving it](#), as in the previous option.
- reject the draft so it returns to the author for further edits.

Approve or Reject a Draft

A workflow may assign the draft of an article or file to you for review. You can:

- approve the draft. The draft then moves to its next assignment in the workflow, or (if it requires no further approvals) is published.
- update the draft and then approve it. The draft then moves to its next assignment in the workflow, or is published.
- reject the draft so it is returned to the author for further work.

To see the drafts assigned to you, select **Articles** or **Files** from the main menu and then select the **Drafts** tab:

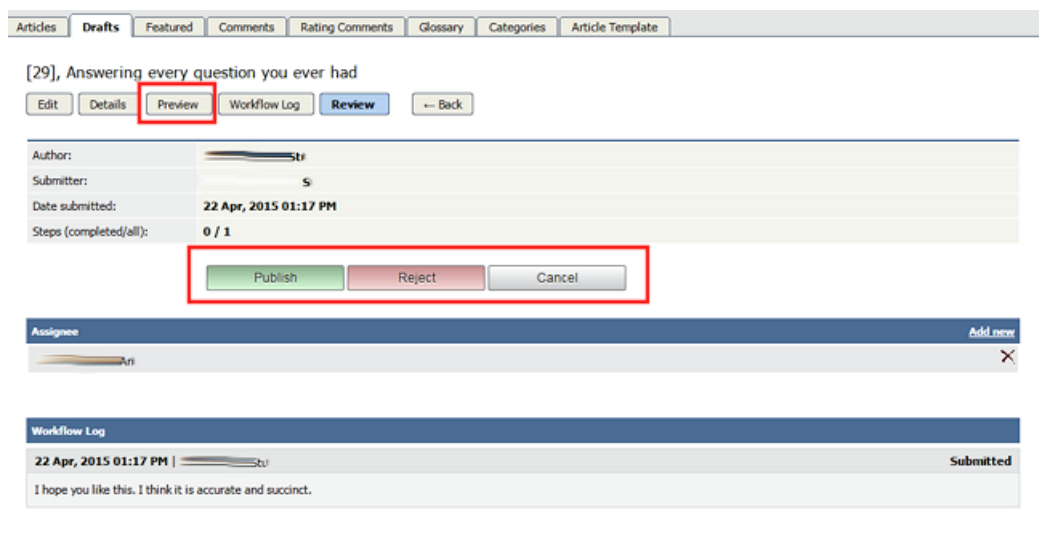


The colors in the article's **Status** column indicate the article's status. The options are:

- Yellow = waiting for approval.
- Red = rejected and returned to the author for further work.
- Gray = in progress; the article is not ready for review.

Review a draft

To review a draft, select a draft with a "waiting for approval" status indicator, click the gear icon in the draft's **Action** column and select **Review**. The review screen appears:



Click **Preview** to display the article or file in a pop-up window so you can evaluate the material.

In the example above, when the current reviewer approves the draft, it will be published. If a further step is required in the workflow before publication, the **Publish** button would be labeled **Approve**.

- If the material is satisfactory, click **Publish**, if it is available, to approve the draft for publication. If the button label is **Approve**, click it to send the draft to its next approval step in the workflow.
- Click **Reject** if the material is not ready for publication. A form appears where you can provide notes about additional work the draft requires. After you have added your comments, click **Reject** to send the notes and the draft to the author.
- Click **Cancel** to close the form without making a decision.

Note: A user with admin privileges can approve or reject a draft at any stage in the workflow process, whether or not the draft is assigned to the admin.

Add or remove an assignee

The **Assignee** section of the **Review** screen lists those who are assigned to review the draft.

- Remove an assignee from the list by clicking the **X** to the right of the assignee's name.
- To add an assignee, click **Add new**. A popup window appears with a list of available staff. Click the down-arrow in the **Action** column for each person you want to assign the draft to. The down arrow changes to a check mark. Close the popup window when you have finished adding assignees.

You can remove all assignees from the list.

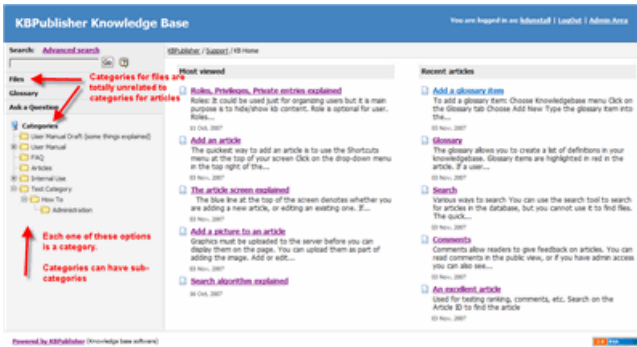
Review the log

The bottom part of the **Review** screen shows the **workflow log**. The author, reviewers, and admins can add comments when they are submitting, approving, or rejecting drafts, and the comments are available in this log.

Categories

What are categories?

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



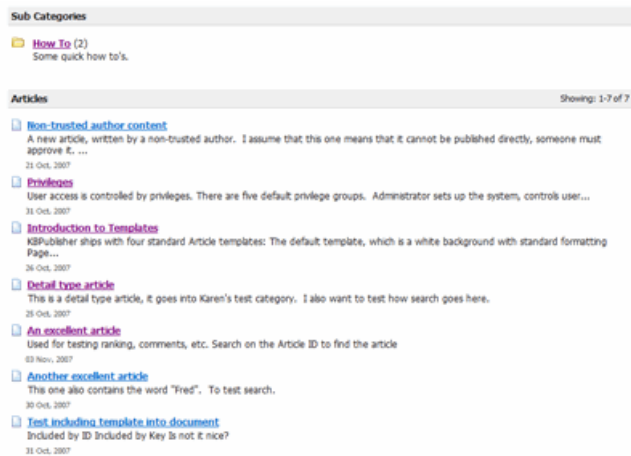
They control the menu display (sometimes known as the table of contents) on the left hand side of the screen.

Categories for articles and files are controlled separately.

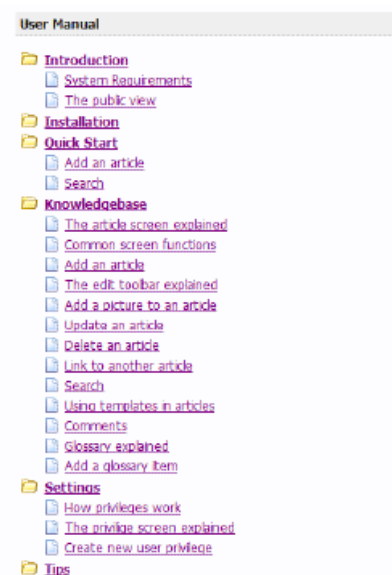
Category types

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

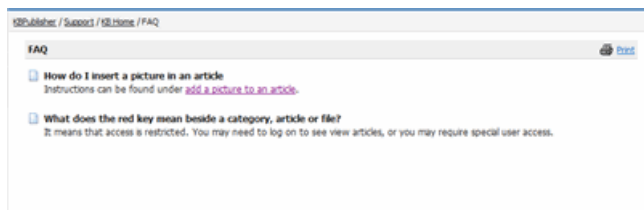
- The **Standard** (default) type displays a list of articles, along with one or two lines of text. If the category has sub-categories, these are displayed above the list.



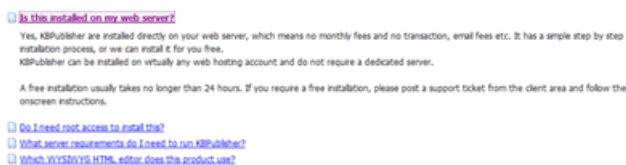
- The **book** type displays items as a table of contents.



- 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.

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

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.

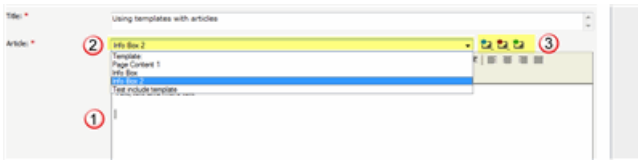
- **Insert** pastes the content of the template into the article. Once the content is added you edit it like any other article content.
- **Replace** works the same way except that instead of just placing the template content into the article at your cursor position, it replaces everything in the article.
- **Include** 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 or [tmpl:includeisclaimer] 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 template ID in the template include command, i.e. [tmpl:include|<ID>] where <ID> is the template 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 **Save**.

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.

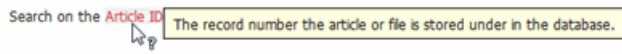
You can use article types to set up a base template for each type of article. For example, the Procedures type may contain one heading called *Summary*, and another called *Steps* with a numbered list below it, while the Error Messages type contains three headings: *Error No*, *Error Message* and *Explanation*. 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 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 glossary gives your readers quick definitions or explanations of words or phrases important to your application, but which the reader might not know.

There are two ways to add a glossary item:

1. Click the **Add** icon  at the top right of the Admin screen and select **Glossary item**.
2. On the **Articles** tab select the **Glossary** sub-tab, then click the **Add new** button.

Either method displays the **Add new** form. Provide the required information for the new item:

- **Word/phrase** - This is the word or phrase that may puzzle your reader. This text will be highlighted in red in articles.
- **Definition** - Explain the word or phrase. In an article, the definition appears in a yellow box when the reader clicks a word highlighted in red.

There are two optional settings:

- **Highlight once** - Select to have the word or phrase highlighted only the first time it appears in an article. Repeated highlighting may make the article more difficult to read.
- **Published** - This is selected by default. De-select to have this item not display in the glossary.

Click **Save** to save the new item. Click **Cancel** to abandon your edits and close the form. Click **Preview** to see how the item will appear.

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 and above

Comments

Article comments

SaComments 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 **Send**.

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.

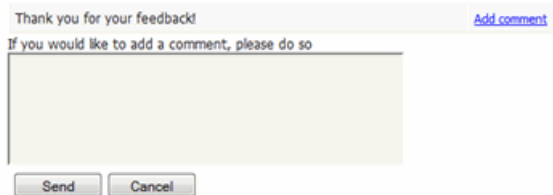
Rating Comments

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.



The screenshot shows a feedback form with a light yellow background. At the top left, it says "Thank you for your feedback" and at the top right, there is a blue link "Add comment". Below this, it says "If you would like to add a comment, please do so" above a large, empty text input field. At the bottom of the form, there 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

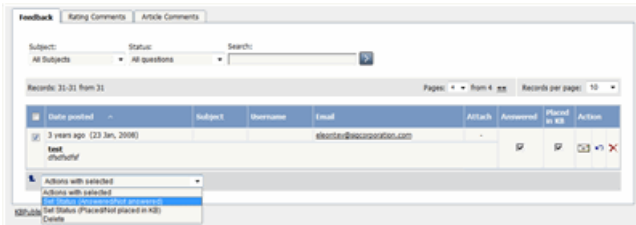
Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0. For a complete list of changed/new functionality, please see [version 4.0 release notes](#)

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

To add a file from your local computer to the server, select **Files** from the menu bar to display a series of sub-tabs. (To link to a file that is already on your server, see [Add a local file.](#))

- To upload a new file that requires no further approvals before becoming available, select the **Files** tab. Then click the **Add new** button to display the form where you specify the file.

The screenshot shows a web interface for adding a new file. At the top, there are tabs: 'Files', 'Drafts (new)', 'Categories', 'Add Local Files', and 'Directory Rules'. Below the tabs is a form titled 'Add new: Max file size: 2 mb | Max post size (all files): 8 mb'. The form has the following fields:

- File:** A text input field with a 'Choose File' button and the text 'No file chosen'.
- Category:** A dropdown menu with a '+' icon to the right for adding categories.
- Title:** A text input field.
- Description:** A large text area for entering a description.
- Tags:** A link labeled 'Add a tag'.
- Private:** Two checkboxes: 'Read' and 'Write', with a help icon (?) to the right.
- Schedule:** A checkbox labeled 'Yes', with a help icon (?) to the right.
- Order:** A dropdown menu with a '+' icon to the left and the text 'Order'.
- Status:** A dropdown menu with the text 'Published'.

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Complete the form's fields:

- **File** -- Select the file to upload.
- **Category** -- Add one or more categories for the files by clicking the + icon to the right of the Category field and selecting from the list of categories provided.
- **Title** -- Add a title.
- **Description** -- Add a description.
- **Tags** -- You can add one or more tags to help users find the file. Click the Tags link and then select tags:
 - Type a few characters of the tag you want in the field that appears, and select the tag from the options provided.
 - Click the "Choose from your tags" link to display all the tags available. Select the ones you want to associate with this file.
- **Private** -- You can opt to restrict either or both **read** and **write** access to the files. If you check either check box another field appears where you can specify which roles users must have to be able to read and/or update the file.
- **Schedule** -- Check the **Yes** check box and use the fields that appear to set a date when the status of the current files changes from unpublished to published. Check the **And** check box to set a date after which the status of the current files changes from published to unpublished.
- **Status** -- You can set the file status as **Published** or **Unpublished**.

Click **Save** to upload the file.

Click **Cancel** to abandon your edits and close the form.

The maximum size of a file you can upload depends on PHP settings. The default is 2MB.

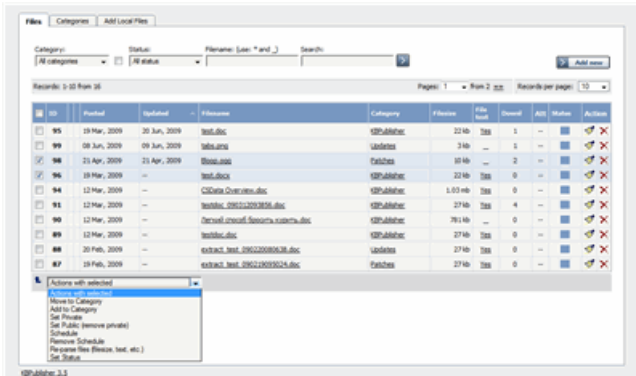
See [here](#) for Files settings (Allowed extension, Max file size, etc).

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 want to add files to the knowledgebase, you can upload files from your local computer, or you can link to files that are already on your server. In KBPublisher such files are known as "local files". If the file already exists on the server it saves space to reference it rather than uploading a second copy specifically for the knowledgebase. By adding a reference to a file that may be also be available through your corporate website or some other site (forms, disclaimers, fair-use and privacy policies, product disclosure statements, catalogues, printable manuals, and so on) you can make the knowledgebase richer and more useful without taking up additional space.

To add a local file (a reference to a file already on your server):

- Select the **Files** menu
- Choose the **Add Local Files** tab to display the **Local add** form:

Files | Drafts [new] | Categories | **Add Local Files** | Directory Rules

Add* local files (which are already on server) here.
Prepare some folder(s) with all required files. Denied or allowed extensions rule will be applied (see "Settings" tab). Files will not be copied or moved.
* Adding a file this way means that a record with the file path is created in the database, so you should not move or delete files on the server after adding it here.

Local add:

Directory: *

File(s):

Category: *

Title:

Description:

Author:

Private: Read Write

Schedule: Yes

Status:

Complete the form's fields:

- **Directory** -- Enter the name of the directory on your server which holds the files you want to link to. Then click **Get files** to display the file or files.
By default all files in the directory are selected. Un-check the check box for each file you do not want to link to.
- **Category** -- Add one or more categories for the files by clicking the + icon to the right of the Category field and selecting from the list of categories provided.
- **Title** -- Add a title. If you are linking to more than one file in this operation, all files will have the same title.
- **Description** -- Add a description. If you are linking to more than one file in this operation, all files will have the same description.
- **Author** -- By default you are identified as the author of the files. Click the **Delete** link to the right of your name to remove it.
- **Private** -- You can opt to restrict either or both **read** and **write** access to the files. If you check either check box another field appears where you can specify which roles users must have to be able to read and/or update the file.
- **Status** -- You can set the file status as **Published** or **Unpublished**.

When the form is complete, click **Add files** to add the files to the list on the **Files** tab.

If you have the correct permissions, you can add the files as drafts. Click **Add as Drafts** to add the files to the list on the **Drafts** tab. Use this option for files that you do not want to publish yet, or for files that require further review or approval before becoming available.

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.
- Files listed are only those in the directory specified. It does not find files in sub-directories within the current directory.
- 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.

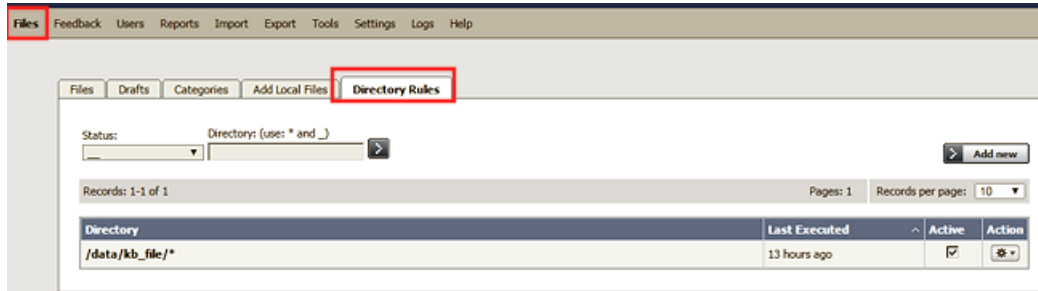
Automatically Add Local Files

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 in KBPublisher links to any new files.

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

Note: this option doesn't move files, it adds links in KBPublisher to files on your server. If you move a file from the location KBPublisher linked to, the links to that file in the knowledgebase will be broken.

To see and manage your directory rules, select **Files** in the main menu, and then the **Directory Rules** tab:



If you have a long list of directory rules, you can filter the list by rule status or by the directory the rule applies to, using the fields above the list of rules.

Managing directory rules

Check the check box in the **Active** column for a rule to enable that directory rule. Un-check the checkbox to disable the rule.

Click the gear icon in the **Action** column of a row to perform one of these actions on the directory rule in that row:

- **Edit** - update the rule's information. The fields are the same as when you add a new directory rule--see the descriptions below.
- **Delete** - delete the directory rule.

Adding new directory rules

To add a directory rule, click the **Add New** button. Complete the form that appears:

Rule options:

- **Directory** - Provide the directory on the server that the directory rule should monitor. The directory name should be the [full server path](#). Click **Read directory** to verify that the path is correct. If the path is correct, you see a list of all files in that directory.
- **Parse child directories** - Check this option to have the rule monitor all sub-directories in the directory. This is selected by default.
- **Description** - A description is not required, but you can add one to describe the files that normally appear in the directory, or information about the directory rule that may be useful to other team members.
- **Active** - This field is selected by default, and once you save the new directory rule it will run at the next scheduled opportunity. Un-check this

check box to disable the rule (you can also enable and disable a directory rule from the full list of rules, as described above).

File options:

- **Category** - Add one or more categories to which the links to the new rules this directory rule finds will be added. Click the + icon to the right of the field to add a category.
- **Author** - By default the current user's name appears in this field, and will be associated with the link to any file the directory rule adds to the knowledgebase. You can select a different user's name as the author, or opt to have no author name.
- **Private** - By default the links the directory rule creates are public. Check one or both check boxes to control read and write access to the linked file to users with the roles you specify. See [private read and write](#).
- **Status** - By default, files are set to a status of **published**, but you can change this to **unpublished**.

To test the settings click **Test**.

Click **Save** to save the new directory rule. Click **Cancel** to abandon your edits and close the form.

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](#).

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 a Category screen
- Select a category by using the text entry field at the top of the screen. You can start typing a category name to filter the category list. You can select multiple categories.
- Click **OK** to save your changes and exit the Assign a Category screen.

On the Assign a Category screen you can also:

- Unassign categories from this article by clicking the **x** button.
- Drag and drop categories into your preferred assignment order.
- Select which category the article will be published in, and which categories the article will be listed in.

Tips:

To quickly assign a category without opening the Assign a Category screen you can:

- Start typing a category name and then select the category.

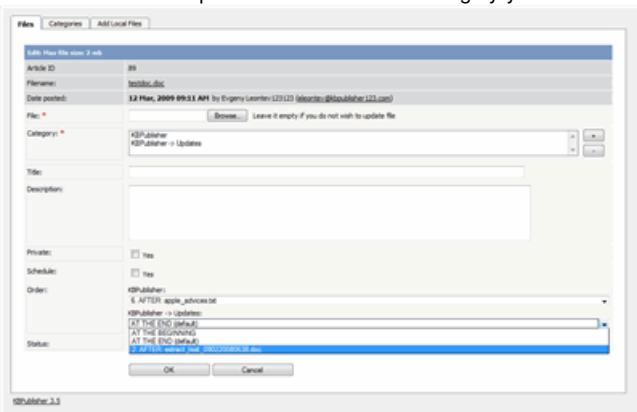
To quickly unassign a category without opening the Assign a Category screen you can:

- Double-click on a category in the **Category** box.
OR
- Click on a category in the **Category** box, and then click the **minus (-)** button.

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 **Delete** from the options dropdown menu under Actions
- 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');"
```

Test antiword from command line

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

```
$ /path_to_antiword/antiword -t file_read.doc;
```

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

```
$ cd /path/to/kbp_directory  
$ php -r "system('/path_to_antiword/antiword -t 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 period—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 fields for 'On the date:' set to '9 October 2009' at '08:00 AM'. A 'Change status to:' dropdown is set to 'Not published'. There is also a 'Notes:' text input field 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 'Yes' checked. The first scheduling option is for '6 June 2009' at '08:00 AM' with 'Change Status To' set to 'Pending (approval required)'. The 'and' checkbox is checked, revealing a second scheduling option for '11 June 2009' at '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

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.

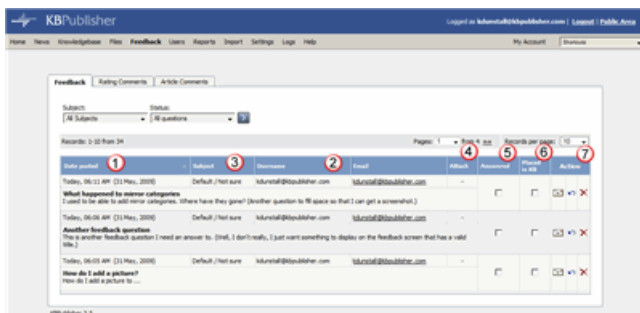
The feedback request also provides a 'Quick Response' answer. As the user types their question, KBPublisher searches for articles appropriate to the words typed and brings back the five articles most likely to match the query. If the answer is in one of the listed articles, the user doesn't have to send 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 **Answer** from the options dropdown menu to reply to the user by email
 - Click **post question to KB** from the options dropdown menu to post an answer to the knowledgebase. The question the user asked becomes the title of the article
 - Click **Delete** from the options dropdown menu 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.

Ask Question and Quick Response

Ask a Question

If you still cannot find the information, you can use KBPublisher's "Ask a Question" feature. As you type in the **Question / Comment** textbox, KBPublisher will display articles that might answer your question. If that list doesn't provide the answer you're after, click **Send** to email your question to the knowledgebase administrator. Questions can be targeted, too, so that questions will be sent to different users in your knowledgebase based on the item selected in the Subject dropdown box.

For more information on configuring recipients for Ask a Question submissions, see the following articles:

- [Set Who Receives Emails](#)
- [How Can I Route a Question Based on the Subject?](#)
- [Add New Feedback Subject](#)

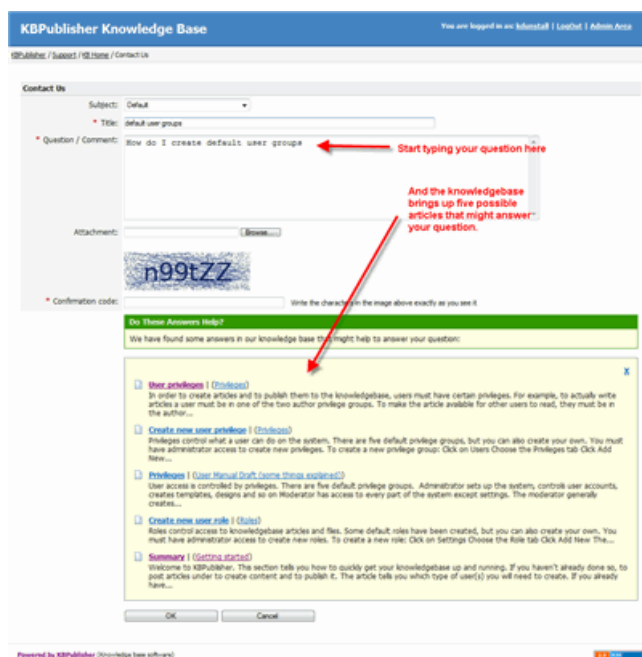
Quick Response

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.



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 the Options icon under **Actions** to display the dropdown list, and then click **Answer**
- 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 the Options icon under **Actions** to display the dropdown list, and then click **Place question in KB**
- 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 **Tools** 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 **Save**.

Article comments

SaComments 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 **Send**.

Your comment is displayed beneath the article.

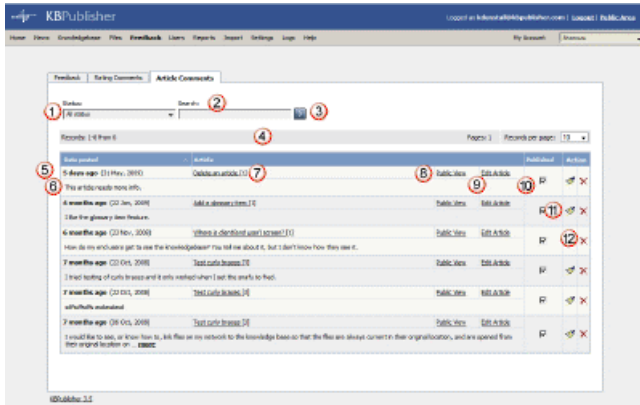
By default, it is displayed immediately, but this can be changed in the settings to require approval first.

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 **Edit** from the options dropdown menu to edit the comment. This includes changing the status.
12. Click **Delete** from the options dropdown menu to delete a comment.

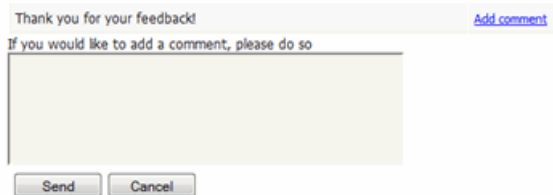
Rating Comments

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.



The screenshot shows a feedback form with a light yellow background. At the top left, it says "Thank you for your feedback" in a small font. To the right of this text is a blue link that says "Add comment". Below this, there is a line of text that reads "If you would like to add a comment, please do so". Underneath this text is a large, empty rectangular text input field. At the bottom of the form, there are two buttons: "Send" and "Cancel", both in a light gray color.

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 **Edit** from the options dropdown menu to edit the comment. This includes changing the status.
12. Click **Edit** from the options dropdown menu to delete a rating comment.

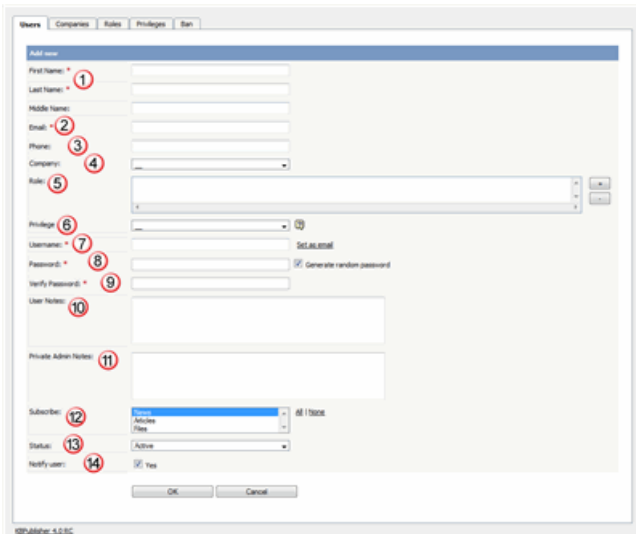
This functionality works in version 3.5 and above

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 Tools -> 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 **Save**.

Tips:

- 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 **Delete** from the options dropdown menu under Actions
- In Actions column click icon [...] and in drop down menu click **Delete**
- Click **OK** to confirm the deletion.

The second way allows you to delete more than one user at the same time.

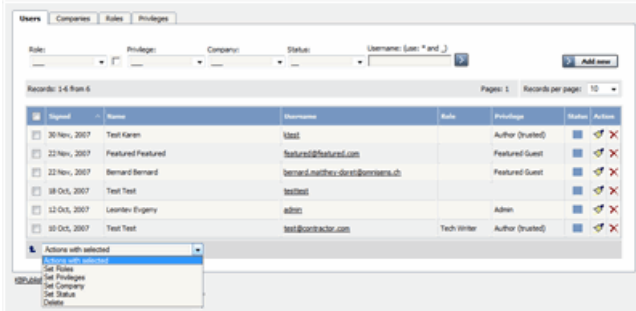
- Click on the **Users** menu
- Check the box to the left of the user or users you wish to delete
- Choose **Delete** from the **Actions with selected** drop down box
Click **OK**
- You will be asked if you really want to delete the user. Click **OK** to confirm.

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**, 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	
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).

Generating API Keys

For API authentication Public and Private keys are required.
Each user has his own unique keys.

To generate and assign keys to user:

- Login to Admin Area
- Click **User** tab
- Click the Options icon under Actions to display the dropdown list, and then click **Details**
- Click **API Settings**, it will open for with API Settings
- Check **API Access** to allow user API requests or uncheck to disallow
- Click **Generate API Keys** if you assign keys in first time or **Reset API Keys** if updating

Important: if you reset API keys it will affect all current scripts for this user

User Activities

The User Activities tab lets you view activity on your site related to a specific user. You can find actions performed by a specific user, actions related to specific articles by this user, or other types of content. This tab duplicates the functionality of the [User Activity Report](#) but is filtered to a specific user.

To open this tab from **User > Users**, select **Activities** from the **Action** column for the desired user.

The screenshot shows the 'Users' management interface. At the top, there are tabs for 'Users', 'Companies', 'Roles', and 'Privileges'. Below this, the user profile for '[2], Moderator Moderator' is displayed, with buttons for 'Edit', 'Details', 'Activities', 'API Settings', 'Change Password', 'More', and 'Back'. A search bar is present with fields for 'Entry:', 'Action:', 'Period:', 'Entry ID:', and 'User IP:'. Below the search bar, it indicates 'Records: 11 - 20 of 122' and 'Pages: 2 of 13'. The main content is a table of activities:

Time	Entry type	Action	Entry ID	User IP
14 Feb, 2017				
06:05 PM	Article	View	10702	127.0.0.1
06:05 PM	Article	View	10702	127.0.0.1
06:05 PM	Article	View	10702	127.0.0.1
06:06 PM	Article	Move to Trash	10702	127.0.0.1
06:08 PM	Article	View	10695	127.0.0.1
06:08 PM	Article	View	10695	127.0.0.1
06:08 PM	Article	View	10695	127.0.0.1
06:08 PM	Article	View	10695	127.0.0.1
06:09 PM	Article	View	10581	127.0.0.1
06:09 PM	Article	View	10588	127.0.0.1

See [this article](#) for details on the User Activity Report.

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**.

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.

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. If **As draft only** is checked, they can add only drafts.
 - 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 **As draft only** is checked, they can update articles as draft only. **Belong to own records** means that the user can update comments for items they own. **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.
 - 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. **Belongs to own records** means that the user can delete comments for items that are designated as their own. If one or more statuses are selected under **If status**, then the user can only delete articles with the assigned status(es).
 - **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.

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

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
- Click "Change Password"
- Type in your **Your Current Password** if required
- Type your new password into the **New Password** field
- Retype the password in the **Verify Password** 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 is 10, 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

Change the order articles and files are displayed in

By default, articles and files in Admin Area are displayed in ascending date updated 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**.



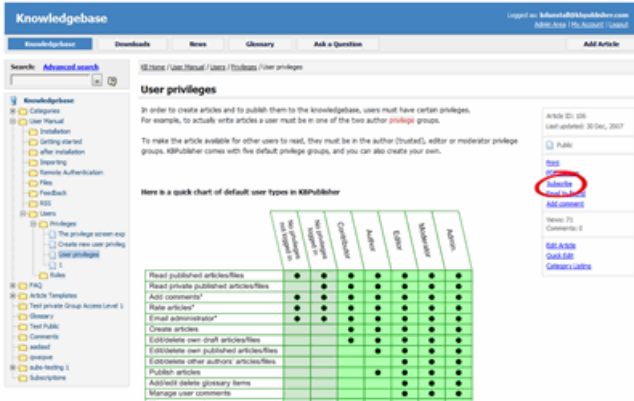
This functionality works in version 3.5 and above

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 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

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

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

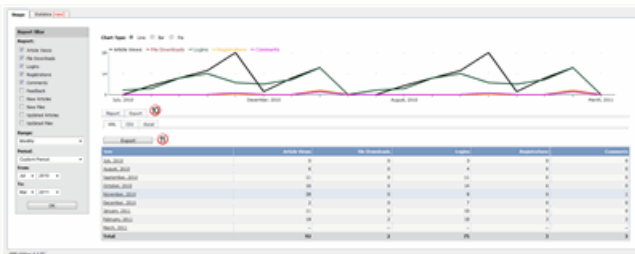
Reports

Reports functionality in KBPublisher

The Usage Report 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

The Views Report Explained

The Views Report lets you review how often visitors are looking at each of your articles or documents.

ID	Title	Views	Rate
62	The category input screen explained	42	77.78%
356	Custom field, everywhere	3	5.56%
382	article 3	2	3.7%
60	Add a glossary item	1	1.85%
383	approval required article	1	1.85%
357	Radio buttons this time	1	1.85%
110	Add an article as a result of user feedback	1	1.85%
242	Letter 1	1	1.85%
248	poemona	1	1.85%
29	What are article templates?	1	1.85%

The main display shows you, for each document:

- the document's ID
- the title
- the number of views (or "hits") the document has had in the current time span
- what percentage of all views that number represents (in the "Rate" column)

If there are a lot of entries, the list at the right is broken up into pages, with the number of entries displayed at the top left. Use the navigation options at the top right to move through the list.

You can **filter** the display to simplify finding what you want. The **Report filter** is on the left of the screen, and you can use one or all of these filter conditions:

- **Type** -- Choose from the available options: Article Views, File Downloads, or News Views.
- **Period** -- Choose a time period such as "This Week". If you choose "Custom", fields appear where you specify the start and end dates for the custom period.
- **Limit** -- Indicate how many entries to display. If you select "___", KBPublisher displays all entries for the type you selected.
- **Category** -- Choose a category to only display items from that category. Check the checkbox to the right of the field to also display entries in sub-categories of the category you selected.
- **Entry ID** -- You can enter one or more document IDs, if you know them, to restrict the display to those documents only. If you enter multiple IDs, separate them with commas (like "22, 40, 104, 10021").

Click **OK** to display filtered search results. If there are no results, your search may be too restrictive: remove or relax one filter and click **OK** again.

To see **details** about document use, check the checkbox at the left end of the row for one or more documents, then click **View Details**. If you want to see details for just one document, you can double-click its title.

The **Details view** appears. This view has a space for a chart at the top and two tabs below.

Details View

The details view can display a chart of document use, and has tabs to report on daily use and to export the information.

Date	ID	Title	Views
01 Jan, 2015	62	The category input screen explained	23
	356	Custom field, everywhere	--
	62	The category input screen explained	22

Chart

A chart of document views can help you analyze viewing and use patterns over time. You can display the information about the selected document or documents as a **Line**, **Bar**, or **Pie** chart; or you can opt to have **no chart**:

Report tab

The Report tab shows the number of views for the selected document for each day in the selected period. Sundays appear in red so you can quickly

see week-by-week information:

Export tab

You can export the views data for the documents you selected. See [Export Reports](#).

To return to the full list of documents, locate the "breadcrumbs" entry at the top of the display. Click either **Article Views** or **Filtered views** to close the details view.

Note: Report functionality only works when scheduled tasks are turned on

The User Activity Report Explained

The User Activity Report lets you view activity on your site so that you can analyze your user base and the state of your content. You can find actions performed by specific users, actions related to specific articles or other types of content, and can even filter your search by date range or IP address.

The screenshot shows the 'User Activity' report interface. On the left is a 'Report filter' sidebar with the following fields: 'Entry type' (set to Article), 'Action' (empty), 'Period' (set to This Month), 'User ID' (empty), and 'Entry ID' (empty). There is also an 'Invert Result' checkbox and an 'OK' button. The main area shows a table of activity records for February 2017. The table has columns: Time, Entry, Action, Entry ID, User, and User IP. The records are grouped by date: 01 Feb, 03 Feb, and 07 Feb, 2017. The table shows actions like View, Create, and Update performed by users like Leontev E. and Rjasnova D.

Time	Entry	Action	Entry ID	User	User IP
01 Feb, 2017					
12:58 AM	Article	View	115	Leontev E.	85.26.164.240
03 Feb, 2017					
10:03 AM	Article	Create	461	Rjasnova D.	88.147.152.56
10:03 AM	Article	Create	462	Rjasnova D.	88.147.152.56
07 Feb, 2017					
01:28 AM	Article	Update	461	Rjasnova D.	88.147.152.58
01:33 AM	Article	Update	461	Rjasnova D.	88.147.152.58
02:25 AM	Article	View	461	Rjasnova D.	88.147.152.58

Note: Report functionality only works when [scheduled tasks are turned on](#).

What reports I can generate?

The User Activity report is very flexible. Here are a few examples of what you can find:

- users who logged in this week
- users who did not log in this week (use the "Invert Result" checkbox)
- articles that were updated last week
- articles that were created this month
- articles that were created this month by specific user
- all of a specific user's actions
- all actions by a user with a specific IP address

What report data is available?

For every entry type, the system logs different actions. The "Actions" dropdown menu in the filter report varies by entry type. For example, the "Publish" action is only available when the entry type is Article Draft or File Draft. As a more extended example, for the User entry type the system logs the following:

- **Create** - Someone created a user
- **Update** - Someone updated a user's details
- **Bulk Update** - Someone updated user details in bulk
- **Delete** - Someone deleted a user
- **Login** - Someone logged in

What are the report filter options?

The Report filter is on the left of the screen, and you can use one or all of these filter conditions:

- **Entry type** - Choose from the available options: ___ (all), Article, File, User, News, Article Draft, File Draft.
- **Action** - Choose from the available options: ___ (all), View, Create, Update, Bulk Update, Delete, Move to Trash, Login, Publish.
- **Period** - Choose from the available options: All, Previous Day, This Week, Previous Week, This Month, Previous Month, This Year, Previous Year, Custom period.
- **User ID** - Enter the numerical ID for a user, or click the + button to select a user from the Users popup. For results already displayed, you can also click on a user's name in the User column and select **Report filter**.
- **Entry ID** - Enter the numerical ID for the entry type, or click the + button to select an entry from the popup.
- **User IP** - Enter an IP address to filter by user IP.
- **Invert Result** - This checkbox extends the report's powerful functionality by displaying the inverse of the results that the currently selected filters would display. For example, you might search for users who have *not* logged in since the middle of last month, or you might want to know which articles have *not* been updated this year.

How are the results displayed?

If there are a lot of entries, the list at the right is broken up into pages, with the number of entries displayed at the top left. Use the navigation options

at the top right to move through the list.

The main display shows the following for each activity log item:

- the time
- the entry type
- the action
- the entry ID
- the user's last name and first initial
- the user's IP address

Can I export this report data?

Yes! See our article about [exporting reports](#) for more information.

Export Reports

You can export your reports on document and file activity from the **Usage, Views** and **User Activity** tabs of the **Reports** menu item.

Each of these tabs has a pair of sub-tabs, **Report** and **Export**. Once you see the information you want to export in the **Report** sub-tab, switch to the **Export** sub-tab to export it.

For **XML** or **Excel**, select that option and click **Export**.

For **CSV** export, accept the defaults for the options for the exported data, or set your own:

- **Fields terminated by** -- The mark that indicates the end of data for the current field; normally a comma.
- **Fields optionally enclosed by** -- You can opt to enclose data for each field in quotation marks or another mark. This allows you to include commas in the data even if they are also used as the field terminators.
- **Lines terminated by** -- For multi-line entries for a field, the mark that indicates when to start a new line.
- **Include field names row** -- Check the checkbox to include the header row in the export.
- **Include total row** -- Check the checkbox to include a "totals" row indicating a count of the entries.

When you are satisfied with the settings, click **Export**.

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.

All articles		ID	Title	#
All articles	171	20	Title	162
All categories	48	37	Add a picture to an article	8
All glossary	44	263	Test curly braces	5

Articles by status		ID	Title	#
Published	158	247	table error	5
Pending (approval required)	0	177	Where is client(oid user) screen?	1
Draft	6	60	Add a glossary item	1
Not published	7	43	Delete an article	1
Total	171	280	Prozovl, vsmakow@2	1

Articles by private status		ID	Title	#
Public	167	272	questionnaire	7.0
Private Read	0			
Private Write	0			
Private Read/Write	4			
Total	171			

Categories by status		ID	Title	#
Published	48			
Not published	0			
Total	48			

Categories by private status		ID	Title	#
Public	26			
Private Read	0			
Private Write	22			
Private Read/Write	0			
Total	48			

Most viewed articles		ID	Title	#
20	Title	162		
37	Add a picture to an article	8		
306	User privileges	89		
63	Add a category	81		
103	Article workflow	70		
52	System Requirements	65		
72	User roles	64		
60	Add a glossary item	61		
136	Category types (new)	60		
118	What is KSPublisher?	59		
43	Delete an article	59		

Articles with high rating		ID	Title	#
20	Title	10.0		
281	test2223444	10.0		
263	articles	10.0		
171	Create new user role	10.0		
49	The privilege screen explained	10.0		
26	Create new user privilege	10.0		
67	User Feedback	10.0		
115	Install KSPublisher	10.0		
274	template	10.0		
74	Add a user	8.0		
272	questionnaire	7.0		

Articles with low rating		ID	Title	#
82	Report users	0.5		
58	Delete a file	1.0		
119	Who might use KSPublisher?	1.0		
262	embed	1.0		
236	Delete 2	1.0		
96	Bulk update articles	1.0		
110	Add an article as a result of user feedback	1.0		
123	Attach a file to an article (attachment)	1.0		
118	What is KSPublisher?	1.0		
263	Test curly braces	1.0		

Most commented articles		ID	Title	#
37	Add a picture to an article	8		
263	Test curly braces	5		
247	table error	5		
177	Where is client(oid user) screen?	1		
60	Add a glossary item	1		
43	Delete an article	1		
280	Prozovl, vsmakow@2	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 and above

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.
Login to Admin Area.

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 Safari. 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**

Note: Articles designated as 'private' are not shown in the RSS feed.

Tools

What are Tags?

Tagging is another non-hierarchical way to group related articles together and to quickly tell readers what they are reading about. Tag keywords and phrases so readers can easily find articles related to specific topics.

Tags are similar to categories, but are more specific. The use of tags is optional.

Tagging an article, news, or file?

It's easy! When you create or update an article or a file, you can assign and/or add new tags to it using the **Meta Keywords/Tags** field.

Click on the **Add a tag** link below the text editor.

You can add tags one at a time by hitting the Enter after typing each tag. Or you can add multiple tags at a time by separating each with a space as you type. You can join 2 or more words together in one tag by enclosing them in quotation marks.

To select a tag from your existing list (tags previously used in KBPublisher) click **Choose from your tags** and select the tags you want to use.

Note: Changes are not saved until you save an article.

Bulk Add or Update Tags

To bulk add or update tags, log on to the **Admin Area**

1. If you are updating:

- an article's tags, click on the **Articles** menu
- a file's tags, click on the **Files** menu
- a news' tags, click on the **News** menu

2. Choose **Set Tags** from the **Actions with selected** drop-down

- a second drop-down will display the following options:

Remove any tags:

- Choose **Remove all tags** from the second drop-down box
- Click **OK**

Add tags:

- Choose **Add to existing** to add tags and not remove existing ones or **Replace existing** to remove old tags and assign new ones
- Click **Add a tag**
- Assign tags from choosing existing ones or add your own tags
- Click **OK** to save the change

Managing Tags

You must have administrator access to manage tags.

Login to **Admin Area**, click **Tools**, choose the **Tags** tab.

From here you can see all the tags used in KB.

Create or updating a tag

The following are compulsory:

- You must enter a tag name in **Title**
- Check **Visible** to make tag visible to end users or uncheck so that it is hidden

You may also wish to:

- Add a **Description** to explain why this tag has been set up and how it should be used
This information is displayed in Public Area, under Tags to help end users searching for content

What is a difference between visible and hidden tags?

A visible tag displays in the Tags of an article (below the article) in the Public Area. Although hidden tags do not display in the Tags section, it is always used for searching.

Can I safely update or delete tags?

Yes, you can. When you update a tag it will affect all entries already assigned.

Conversely, when you delete a tag, it will be deleted from all entries that it was assigned to.

Since the daily scheduled tasks are responsible for updating meta keywords updates it might take some time for these changes to take effect.

Tags in Public Area

The 3 uses of tags in the Public Area

- While viewing an article you can see all assigned tags below an article.
Click on a tag to display all articles with this tag. This function is the same for the News section.
- The **Tags** section will list all tags.
Click a tag to be redirected to search section displaying all articles with this tag.
- In Advanced Search you can search the knowledgebase by tags.
 - Type keywords in **Keywords** field, you can type several keywords separated by comma
 - In **Search In** choose **Articles (tags, keywords)** or **Files (tags, keywords)** or **News (tags, keywords)**
 - Click **Search** and KBPublisher will search in articles, files, or news respectively.

Custom fields

Custom Fields

Custom Fields

You can customize your knowledgebase by adding custom fields.

These custom fields can be defined for:

- Articles
- Files
- News
- 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.

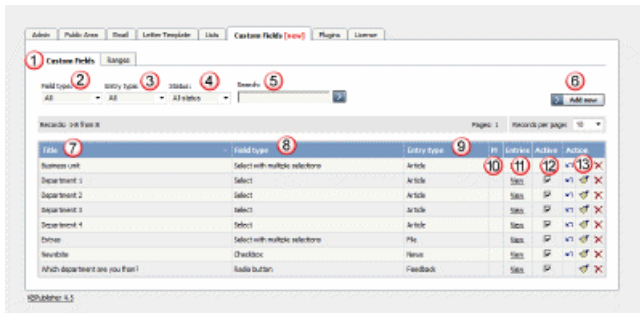
Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

You can show or hide any field in a search form.

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 to 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.
 - o **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.
 - o **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.
 - o **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.
 - o **Load** takes you to the range, so that you can edit, update or re-sort the individual valid values
 - o **Edit** allows you to rename the range and update the description
 - o **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.

To add a new custom field

- Click on **Tools** -> **Custom Fields** tab
- Click on the **Article, File** or other tab
- Click **Add New**
- Choose your **field type** by clicking on one of the field types.

- **Categories**
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** tab
- 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 **Ranges** 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 define 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
- If you wish your visitors will be able to search in this field check **Display in search** checkbox

- Click **Save** to create the field.

Note:

- If you have existing articles or files, 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 and click **Add Values**.

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.

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 **Save**.

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
- **Save** 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 **Save**
- 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 **Save**
- Delete existing values
 - Click on the delete icon of the value you wish to change
 - Click **Save** 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 **Save**

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

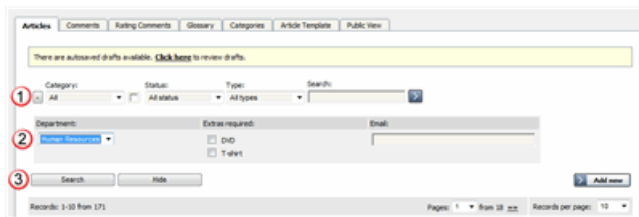
Click on **Settings** menu

- 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.

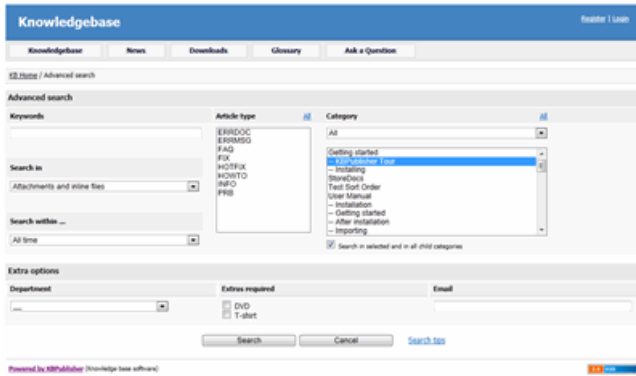
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this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

Search in custom fields

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

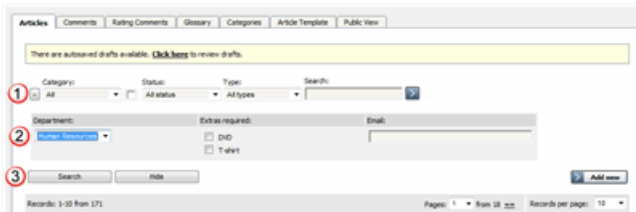
To search in the Public Area

- 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
			DVD		

Nerds Rule	Product	Extras	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

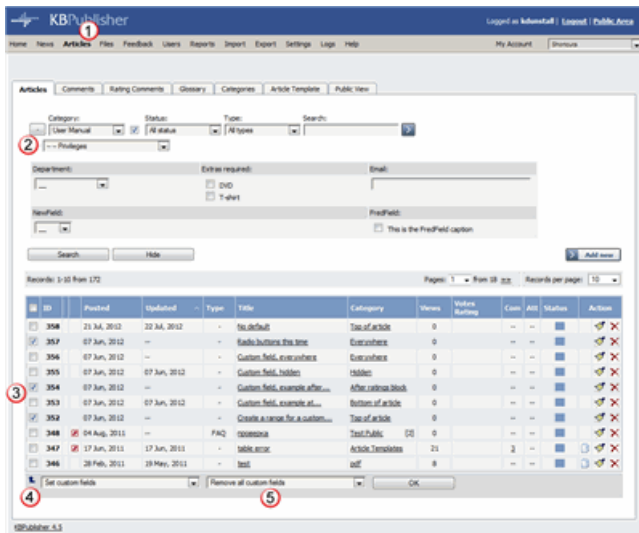
No valid value has been set for the article *How to make cards*. Also, *Extras* can be defined anywhere.

- 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.

The Lists Tab Explained

The **Lists** tab under the **Tools** 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 three default article and file statuses: Published, Not published and Outdated.

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),

[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), Not active / Suspended and Unconfirmed.

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.

Article feedback status

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.

Automations

Use automations (automated tasks) to check your content regularly and perform certain actions as needed. You can make sure your articles are up to date, and alert staff to review them when they are not. You can let authors know when articles have been approved for publication, or let managers know when articles are ready for review.

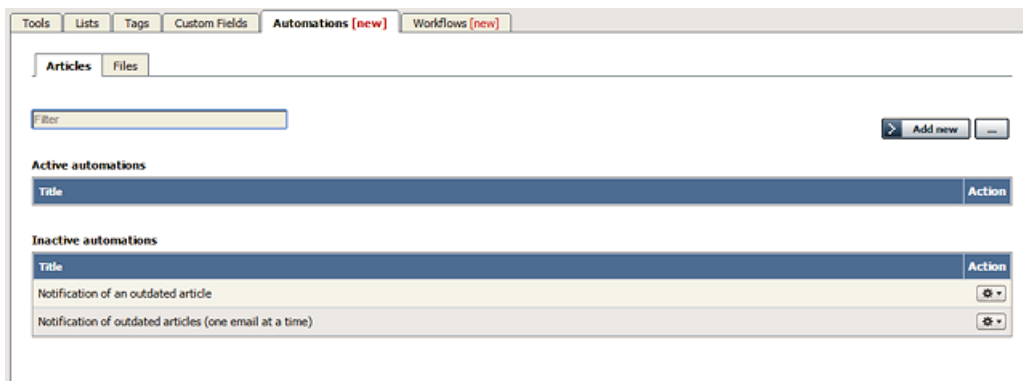
To access your automations, select **Tools** from the menu bar. Then select the **Automations** sub-tab.

Essential facts for automations

- Automations are time-based: they act when a time-based event occurs, such as the time since an article was edited exceeding a specified maximum time.
- Automations run daily, at midnight.
- An automation must contain a condition that is true only once, or an action that nullifies at least one of the conditions; otherwise, the automation will run daily, possibly sending unwanted duplicate alerts every time it runs.

Manage Automations

To access your automations, select **Tools** from the menu bar. Then select the **Automations** sub-tab:



The tab displays both your active and inactive automations for either articles or files. Switch between the **Articles** and **Files** tabs to see all existing automations. If the list is long, enter a keyword in the **Filter** field to display just the automations that have that keyword in their titles. To restore the full list, remove all text from the **Filter** field.

For each automation, you can click the button in the **Action** column and select an action to perform:

- **Change status** - Select to change the status of the automation from active to inactive, or from inactive to active. A confirmation message appears to make sure you want to change this status.
- **Duplicate** - Make a copy of the automation that you can then edit. This helps you quickly create automations that are similar to existing ones.
- **Edit** - Edit the automation. See [Creating or editing an automation](#).
- **Delete** - Select to delete the automation. A confirmation message appears to confirm you want to do this.

Add an Automation

To create a new automation, click **Add new**. See [Creating or editing an automation](#).

Reorder

To change the display and execution order of the automations:

- Click the button with three dots [...] in the top right corner.
- Choose Reorder from the popup menu.
- Rearrange the articles by dragging and dropping them in the results list.
- Click Save.

Creating or editing an automation (automated task)

To create a new automation (automated task), click **Tools -> Automations** tab make sure you are on the sub-tab the automation will be for: **Articles** or **Files**. Then click **Add new**. See the information below about completing the form that appears.

When you create a new automation, or update an existing one, you see the same form:

The screenshot shows a form for configuring an automation. It has four main sections: 'Title', 'Conditions', 'Actions', and 'Active'.
- **Title:** A text input field.
- **Conditions:** A section starting with 'if' and a dropdown menu set to 'All', followed by the text 'of the following conditions are met:'. Below this is a row of three dropdown menus: 'Status', 'Is', and 'Published'. To the right of these are '+' and '-' buttons.
- **Actions:** A section starting with 'Perform the following actions:'. Below this is a row of two dropdown menus: 'Set Status' and 'Published'. To the right of these are '+' and '-' buttons.
- **Active:** A checkbox labeled 'Yes' which is checked.
At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Complete the form in the following manner:

- **Title** - Required. Provide a descriptive title for this automation. It should not be the same as the title of an existing automation.
- **Conditions** - You must have at least one condition that the automation checks each time it runs. You can have multiple conditions. Set the automation to perform its actions if **any** or **all** of the conditions are true. Add a condition by clicking the + button; remove a condition by clicking its - button.
- **Actions** - If the automation finds that the conditions in the previous field are met, it performs the actions you set here. You can have multiple actions. Add an action by clicking the + button; remove an action by clicking its - button.
- Each action will either **set status** or **send emails** to one or more recipients.
 - **Set status** - If you choose this action, in the next field specify the new status for the article or file from the list of options shown above.
 - **Email** - you can choose to send an email to yourself or another user, or to a user group. You can opt to send one email for each item that matches the conditions, or to bundle all the notices into a single email.
You need to prepare the email template in the fields that appear:
 - **Title** - Provide a title for the email.
 - **Body** - Provide the body of the email. You can use template tags to customize the email: for instance, if you want to include the title of the article in the email, you could write "This is an alert about the article [article.title]." When the automation needs to send the email, it replaces the template tag with the appropriate information.
To see the template tags that are available, click **Show template tags**.
To check that the email looks as it should, click **Test template** to see a preview.
- **Active** - Select to activate this automation. It will run daily until deactivated.

Click **Save** to save the automation. Click **Cancel** to abandon your edits and close the form.

Important:

An active automation will run daily. Make sure that, when the automation finds an article or file that meets its conditions, one of the actions invalidates for that item one of the conditions of the automation.

Incoming email automation allows you to parse your email box and create articles, drafts, or news from emails.

Create or update an automation

To create a new automation for incoming email, click **Tools -> Automations -> Incoming Mail** tab, then click the **+** (**Add new**) icon.

To update an existing automation, click **Tools -> Automations -> Incoming Mail** tab, click the [...] icon on the right and choose **Edit** from the dropdown menu.

Complete the form in the following manner:

- **Title** - Provide a descriptive title for this automation. It should not be the same as the title of an existing automation.
- **Email Box** - Choose or set up a new email box to be parsed.
- **Conditions** - You must have at least one condition that the automation checks each time it runs. You can have multiple conditions. Set the automation to perform its actions if **any** or **all** of the conditions are true. Add a condition by clicking the **+** button. Remove a condition by clicking its **-** button.
- **Actions** - If the automation finds that the conditions in the previous field are met, it performs the actions you set here. You can have multiple actions. Add an action by clicking the **+** button. Remove an action by clicking its **-** button.
 - **Create Article Draft** - If you choose this action, an article draft will be created. You also can specify whether to send for approval or not by checking "*Send for approval*" checkbox.
 - **Create Article** - If you choose this action, an article will be created.
 - **Create News** - If you choose this action, a news will be created.
- **Active** - Select to activate this automation. It will run daily until deactivated.

Click **Save** to save the automation. Click **Cancel** to abandon your edits and close the form.

Important: An active automation will run daily.

Create or update an Email Box

To create a new Email Box or update an existing one, you first must navigate to the Email Box list. Click **Tools -> Automations -> Incoming Mail** tab, then click [...] icon on the right and choose **Email Boxes**. A list of all available email boxes will appear.

To create new box, click the **+** button in the top right corner and fill the form.

To update an existing box click [...] in the list and choose **Edit** from dropdown menu.

Complete the form in the following manner:

- **Title** - Provide a title for the Email Box.
- **Hostname** - Provide a host name.
- **Port** - Provide a port. The default IMAP port is 143, or 993 when SSL/TLS is enabled.
- **SSL** - Check this checkbox to use SSL.
- **Mailbox** - Provide a mailbox name. The default is *INBOX*.
- **User** - Provide a username.
- **Password** - Provide a password.
- **Max message count** - This is the maximum number of messages to process in one task. If this number is exceeded, the mailbox will be skipped.

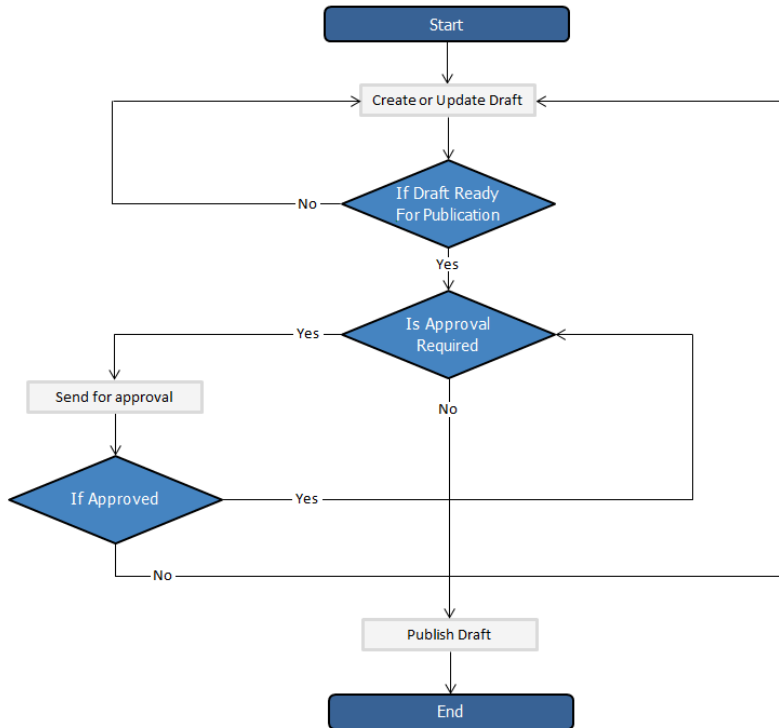
Click **Save** to save the Email Box. Click **Cancel** to abandon your edits and close the form.

Workflows

Workflows automate processes for reviewing, approving, and publishing articles. This can save you time and make sure articles that may be ready to publish, but need approval, are not overlooked. If the item requires review and approval before it is published, a workflow can transfer the item to the worklist of the person who is responsible for approving it. That person can approve the article or send it back for further edits.

Workflow Flowchart

The image below shows the path the draft of an article or file might have to follow if, after the author has written or uploaded it, one or more people have to review and approve it before publication.

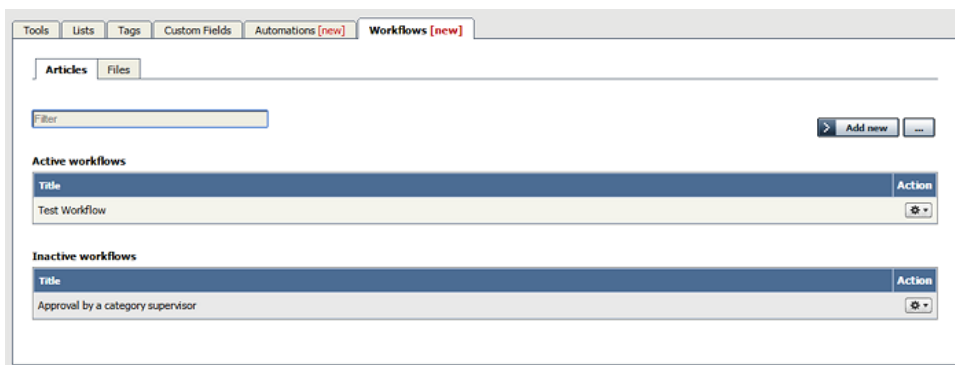


Essential facts for workflows

- Workflows are applied to drafts of articles and files only
- You cannot delete or edit a workflow which in use (is applied to some drafts).
- You can have as many approval steps in a workflow as your project's process requires.

Manage Workflows

To access your workflows, select **Tools** from the menu bar. Then select the **Workflows** sub-tab:



The tab displays both your active and inactive workflows for either articles or files. Switch between the **Articles** and **Files** tabs to see all existing workflows. If the list is long, enter a keyword in the **Filter** field to display just the workflows that have that keyword in their titles. To restore the full list, remove all text from the **Filter** field.

For each workflow, you can click the button in the **Action** column and select an action to perform:

- **Change status** - Select to change the status of the workflow from active to inactive, or from inactive to active. A confirmation message appears to make sure you want to change this status.
- **Duplicate** - Make a copy of the workflow that you can then edit. This helps you quickly create workflows that are similar to existing ones.
- **Edit** - Edit the workflow. See [Creating or editing a workflow](#).
- **Delete** - Select to delete the workflow. A confirmation message appears to confirm you want to do this.

Note: You cannot delete a workflow that is in use. Updates are limited while some drafts it relates to are being approved.

Add a Workflow

To add a workflow, click **Add new** and complete the form. See [Creating or editing a workflow](#).

Reorder

To change the display order of the workflows, click the [...] icon and choose **Reorder** from dropdown menu.

Creating or editing a workflow

To locate your workflows, select **Tools** from the menu bar and then select the **Workflows** tab.

You can create your own workflow from scratch, or copy an existing workflow and adapt it to your needs. You can create or edit a workflow for either articles or files.

- To create a new workflow, click **Add new** to open the Workflow form.
- To edit a workflow, click the gear icon in the workflow's row and select **Edit**.
- To make a copy you can adapt, click the gear icon in the workflow's row and select **Copy**.

The workflow form appears, with blank fields if it is for a new workflow and with the existing information if you are editing or copying an existing workflow.

Note: you can't edit an active workflow. First change the workflow's status to "inactive" and then open it for editing. When you have completed the edits, you can change the status back to "active".

The screenshot shows a web interface for editing a workflow. At the top, there are navigation tabs: Tools, Lists, Tags, Custom Fields, Automations [new], and Workflows [new]. Below these is a sub-tab for 'Articles' and 'Files'. The main form is titled 'Edit' and contains the following fields and sections:

- Title:** A text input field containing 'Approval by a category supervisor'.
- Conditions:** A section with a dropdown menu set to 'All' and the text 'of the following conditions are met:'. It contains two conditions:
 - Condition 1: 'Draft is' (dropdown) 'Published' (dropdown) with a '+' button to the right.
 - Condition 2: 'Author's privilege level' (dropdown) 'Is Greater Than' (dropdown) 'Author' (dropdown) with '+' and '-' buttons to the right.
- Steps:** A section titled 'Perform the following approval steps:'. It contains one step:
 - Step 1: 'Review by category supervisors' (text input) with a '+' button to the right. Below it, 'Assign to' (dropdown) and '[category supervisors]' (dropdown).
- Active:** A checkbox labeled 'Yes' which is checked.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Complete the fields in the form:

- **Title** -- Provide a unique, distinctive title for this workflow.
- **Conditions** -- Add one or more conditions that the workflow evaluates each time it runs. You can set the workflow to take action if **any** of the conditions are true, or if **all** conditions are true. In the example above the workflow conditions apply to articles that have been published and where the author's privilege level is greater than "author" (the author is also an editor, for example).
 - To add conditions, click the + button to the right of the field.
 - Each condition can apply to one of these:
 - Whether the draft is published or not.
 - The author's privilege level.
 - The author's identity.
- **Steps** -- Provide one or more steps for the workflow to take if the Conditions section evaluates to true.
 - Add steps by clicking the + button to the right of the field.
 - For each step, provide:
 - A title for the step.
 - The action to take (like "assign" the article or file).
 - Where relevant, the person or role to assign the article or file to. Select from the options provided.
- **Active** -- By default, each workflow is set as active. To deactivate it, uncheck this check box. The workflow appears in the Inactive workflows list.

Click **Save** to save the workflow and add it to the active or inactive list.

Click **Cancel** to abandon your edit and close the form.

Workflow examples

Here are some examples of how to use workflows for drafts of material that need review and approval before publication.

Simple, one-step approval

When you have users with the "contributor" privilege adding a drafts, use a workflow like this to alert the category supervisor when draft content is ready for review.

The screenshot shows a workflow configuration interface with the following fields:

- Title:** Approval by a category supervisor
- Conditions:** if All of the following conditions are met:
 - Author's privilege level Is Equal To Contributor
- Steps:** Perform the following approval steps:
 1. Review by category supervisors
 - Assign to [category supervisors]
- Active:** Yes

The workflow checks for draft content that has been submitted for review by a "contributor" user and assigns such content to the appropriate supervisor. If the category has no supervisor assigned, KBPublisher parses the category tree to find the appropriate supervisor. If no category supervisor can be found, the system sends a message about the draft to the email address defined in **Settings > Email > Admin Email**.

You should assign a supervisor at least for each top category (the same supervisor can be responsible for multiple categories). See [Can I route an Approval email based on the category?](#) for information about assigning category supervisors.

Assign to a specific approver

When you want a specific staff member to review draft submitted for publication, use a workflow like this that identifies the specific user:

The screenshot shows a workflow configuration interface with the following fields:

- Title:** Assign to user
- Conditions:** if All of the following conditions are met:
 - Author's privilege level Is Less Than Editor
- Steps:** Perform the following approval steps:
 1. Assign to user
 - Assign to [current user: Evgeny Leor]
- Active:** Yes

When a user with the "author" or "moderator" privilege adds a draft, the draft will be assigned for review to the person specified. In the example above, the person is the current logged-in user; but you can assign any user to review the material.

Multiple-step approval

If your workflow requires multiple approval steps before draft material is published, use a workflow like this one:

Add new

Title: *

Conditions: * if of the following conditions are met:

Steps: * Perform the following approval steps:

1.

2.

Active: Yes

In this example, when a contributor creates a new draft, the draft will be assigned for review to a user with "editor" privileges. When the editor has approved the material for publication, the draft is assigned to a user with "moderator" privileges for final review and approval. When the moderator has approved the material, it is published.

You can add as many approval steps as your project's process requires.

As with the first example, if KBPublisher cannot find a user with "editor" or "moderator" privileges, it sends a message about the draft material to the email address defined in **Settings > Email > Admin Email**.

Settings

An explanation of the Settings module and how it works

The Admin Tab Explained

The **Admin** tab is the first tab under **Settings**. The fields on this tab control KBPublisher's configuration. Only administrators can change the settings on this tab.

You can reduce the number of fields displayed by typing key words into the **Filter** field, making it easier to find the fields you want. Restore the display by removing any entries from this field.

Click **Save** to save your edits; click **Set Defaults** to restore the original values for all fields.

International

- **Language** - Select the language for field labels and other onscreen texts for your KBPublisher.

Date & Time

- **Time zone** - Select the time zone to use. If your team is distributed across many time zones, the time zone you select may not be the one for the area where you live, but rather the one where the majority of your team lives and works.

Security / Privacy

- **Session expires (in minutes)** - controls how long before the user is automatically logged out when they are not actively using the system. If you wish to turn automatic logout off, set this to 0.
- **Allow automatic sign-in** - If enabled, users do not need to re-enter their username and password when returning to the site. Note: This option requires that the site be configured for SSL.
- **Enable visual confirmation to login** - controls whether a user has to pass a CAPTCHA test, typing the test displayed in an image, in order to log in. The displayed image looks like this:



- **Enable visual confirmation to reset password** - controls whether a user has to pass a CAPTCHA test, as described above, in order to reset the account password.
- **Password Rotation Frequency** - Defines how frequently password changes are required. Available options are: Off, 90 days, 180 days, and 1 year.
- **Password Rotation Policy** - Available options are: Advisable and Mandatory.
Advisable - On login, notify the user that a password change is recommended.
Mandatory - Required a password change before the user can continue.
- **Old password required to change password** - Select to require the user to provide their current password as well as the new password they want to change to.

API

- **Enable API access** - Select to allow users access to the KBPublisher API.
- **Secure API connection** - Select to require a secure API connection (the URL starts with `https://` instead of `http://`).

Look & Feel

- **Box width** - Required. Set the width of the frame for the administrator's screen in pixels, like `980px`, or as a percentage of the user's screen, like `90%`.
- **Number of records per page** - Set the number of records displayed per page when a user first goes to that page. The user can temporarily change the setting while on the page.
- **Sort articles by** - Specify the initial sort order for articles, which the user can change temporarily when working with a list of articles. The options are:
 - Title (sorted alphabetically)
 - Date added (newest first)
 - Date added (oldest first)
 - Date modified (newest first)

- Date modified (oldest first)
- **Sort files by** - Specify the initial sort order for files, which the user can change temporarily when working with a list of files. The options are the same as for the previous field.

HTML Editor

- **HTML editor file directory** - Required. Provide the location for images you use in articles or files that you link to. KBPublisher uses this location when you perform actions like [insert a picture into an article](#).

Scheduled Tasks

- **Send critical messages to admin** - Select to send the administrator an email alert of critical errors in scheduled tasks so the administrator can respond quickly. Define the email address to receive these messages in the [Email settings tab](#).

Tags

- **Allow to create tags** - Select to let users create custom tags when adding a record. If this is not selected, users can only choose from among the existing tags.

Article

- **Maximum number of revisions** - Specify how many past versions of a document are stored. If you set this to 5, then when the document is changed and saved the sixth time and after, the oldest revision is deleted so only the five most recent versions are retained. If you don't want to keep article history at all, set this to 0.
- **Autosave recovery information every** - Specify in minutes how often KBPublisher should automatically save an article a user is editing. To turn autosave off, set this to 0.
- **Default category** - If you select a category for this field, all new articles will by default be part of that category. Select *None* to disable this option.

Files

- **Files directory** - Required. Set the location where files are uploaded to, in this [server path](#) format.
- **Max file size** - Set the maximum file size, in kb, that users can upload (1024 kb = 1 mb). The maximum you can set depends on your php settings: see [Handling file uploads](#).
- **Allowed extensions** - You can specify the file types that can be uploaded, separated by commas, such as "txt,png,doc,docx". Note: if you enter anything in this field, KBPublisher ignores any entry in the following field.
- **Denied extensions** - Specify types of files that cannot be uploaded, separated by commas, such as "php,exe,asp,cfm".
- **Extract raw text** - Select to have KBPublisher try to extract the text from PDFs and similar files so it can include the content of the files when the user does a search.
- **XPDF installation path** - XPDF extracts content from PDF files to make that content searchable. If you have XPDF installed, provide the relative path to it in the form "/user/bin/". To disable this option, enter "off".
- **Catdoc installation path** - Catdoc extracts content from .doc files to make that content searchable. If you have Catdoc installed, provide the relative path to it in the form "/user/bin/". To disable this option, enter "off". Note: You can use either Catdoc or Antiword (below). You don't have to use both.
- **Antiword installation path** - Antiword extracts content from .doc files to make that content searchable. If you have Antiword installed, provide the relative path to it in the form "/user/bin/". To disable this option, enter "off".
- **Spy Directory missing files policy** - Select from the options provided what the auto-load directory files functionality should do when it finds a file listed in the database that is no longer on the server.
- **Default category** - If you select a category for this field, all new files will by default be part of that category. Select *None* to disable this option.

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.

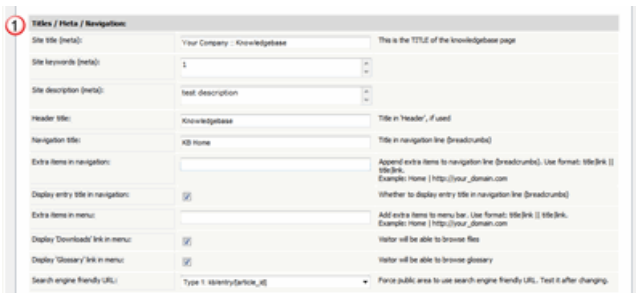
Only an administrator can change the settings on this page. The page is divided into three further tabs:

- 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.

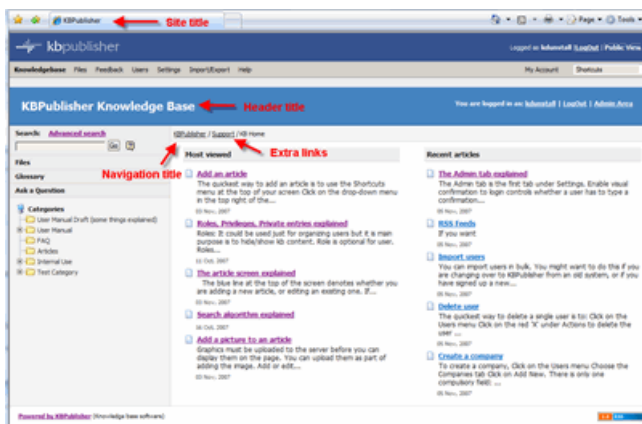
Common settings

1. The **Titles/Meta/Navigation** section controls how the browser displays the knowledgebase.

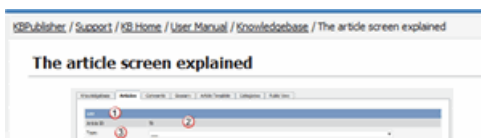


- **Site keywords (meta)** and **site description (meta)** contain keywords used by search engines to identify your site.
- The **header title** is the text displayed in the header,
- The **navigation title** is the home page in the navigation bar
- **Extra items in navigation** show any extra links 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'.

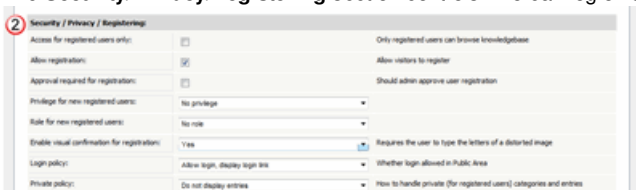


- You can show or hide the article title in the breadcrumb trail at the top of the screen by changing **Display entry title in navigation**



- 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.

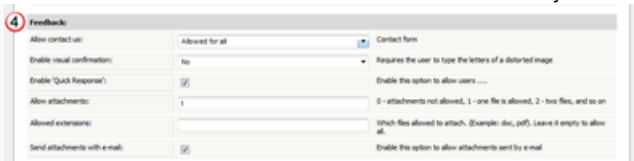
3. Look and feel



- 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.
- 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 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 Tags section controls tag options

- Check **Display 'Tags' link in menu** to allow visitor browsing tags
- Check **Display tags** to display tags for articles, files, news, etc.

7. The Search area controls search options



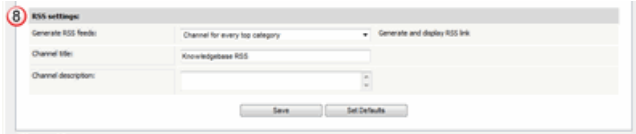
- You can set define whether the initial search searches the whole knowledges, just in articles or just in files by setting the **By default search in** field. Note that this is can always be overridden by the user in the advanced search.
- If you want users to see auto-suggestions of words as they start 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.

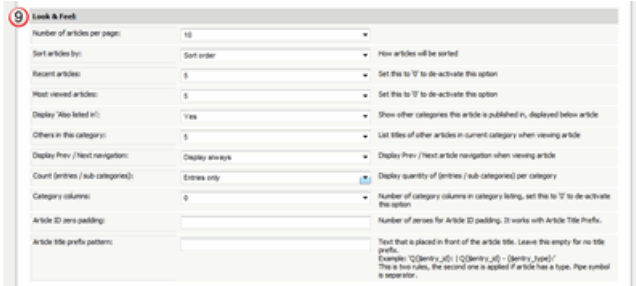
8. Lastly, the **RSS settings** control whether the knowledgebase is available as an RSS feed and how the feed is set up.



- **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**.
- Whether or not people can see the featured articles is controlled by **Featured articles**. If it is set to 0, featured articles are not shown, otherwise the number of recent articles displayed is the number set here.
- **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.
- **Category cols** defines how 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 exaple, 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.



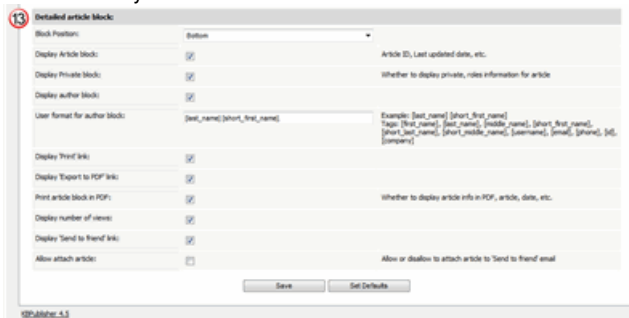
- **Allow rate articles** lets the user rate articles in your knowledgebase. Ratings can be text--helpful/not helpful--or you can use a star system where the user rates the article out of five stars.
- You can also turn on **allow comments**, which brings up a feedback box when a user rates an article 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**.



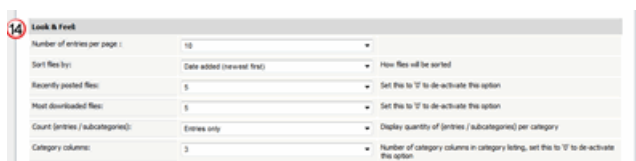
Note that if you are logged in and have edit rights, you will also see the edit options: edit, quick edit and category listing. Plus, some of the information in this block is controlled by other knowledgebase settings, particularly comments and subscriptions (see points 6 and 9 above).

- **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.

Article ID: 106 Last updated: 10 Jun, 2009
Public
Print PDF version Unsubscribe Email to friend Add comment
Views: 74 Comments: 0
Posted: 30 Nov, 2007 by Dunstall K. Updated: 10 Jun, 2009 by Dunstall K.
Edit Article Quick Edit Category Listing

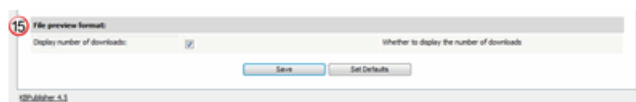
Files

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**.
- **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' tab in the KBPublisher 3.3 settings interface. It is divided into three numbered sections:

- 1. Support Email:** This section allows defining system emails. It includes fields for 'Support Mailer' (KBPublisher), 'From Email / Support Email' (kbpub@kbpub.com), 'From Name / Support Name' (Support Team), 'No Reply Email' (noreply@kbpub.com), and 'Admin Email' (andrey.shubin@gmail.com). Each field has a 'Tap' button to open a selection dialog.
- 2. Email Settings:** This section configures the mail system. It includes a 'Mailer' dropdown set to 'SMTP', a 'Sendmail Path' field (var/sbin/sendmail), a 'SMTP Host' field (mail.kbpub.com), a 'SMTP Secure' dropdown set to 'None', a 'SMTP Port' field (25), a checked 'Use SMTP Auth' checkbox, a 'SMTP User' field (webmaster@kbpub.com), and a masked 'SMTP Password' field.
- 3. Mass Mailer:** This section controls email limits. It has a field for 'Email limit per hour' set to 250, with a note 'Maximum number of emails to be sent per hour'. Below this are 'Test / Save' and 'Set Defaults' buttons.

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.

- **Email limit per hour** controls how many emails are sent per hour.

The Export tab explained

Under **Settings > Plugins**, the **Export** tab allows you to enable and configure the Export plugin, which is available as an add-on to enhance KBPublisher functionality. To use the Export plugin, you need to [purchase a plugin key](#), which is sold separately. For KBPublisher Cloud users, select a plan that includes the Export plugin.

Export Plugin

- **Plugin key** - Enter your plugin key here. To see how the system works, type 'demo'. Note that demo documents have a 'trial' watermark on each page and are limited in quantity.
- **Allow category exporting** - If allowed, users can export whole categories to PDF. Available options are: Not allowed, Allowed for all, Allowed for registered users only, and Allowed for staff only.
- **Font** - Select the default font for document text. Available options are: Arial, Courier, Helvetica, Monospace, Sans Mono, Sans, Serif, and Times.
- **Font size** - Enter the default font size, in points.

WKHTMLTOPDF

WKHTMLTOPDF is preferred over HTMLDOC. Third-party tools, such as WKHTMLTOPDF, are already installed and available for KBPublisher Cloud users.

- **WKHTMLTOPDF installation path** - To produce PDFs, you need to install [a program called WKHTMLTOPDF](#). Turn this feature off by entering 'off', or specify a path where this program is installed. For example: /usr/bin/
- **Cover template** - Click the ellipsis to view, edit, enable, or disable the cover page template. When enabled, the cover template adds cover page to the resulting PDF when you export a category.
- **Header template** - Click the ellipsis to view, edit, enable, or disable the header template. When enabled, the header template adds a header to all PDF-generated pages.
- **Footer template** - Click the ellipsis to view, edit, enable, or disable the footer template. When enabled, the footer template adds a footer to all PDF-generated pages.

The checkboxes indicates whether or not each template is enabled. Please note these template options only work if you use WKHTMLTOPDF.

HTMLDOC

- **HTMLDOC installation path** - To produce PDFs and HTML pages, you need to install a program called HTMLDOC. Turn this feature off by entering 'off', or specify a path where this program is installed. For example: /usr/bin/

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.

How to enable Sphinx Search

Sphinx is a full-text search engine that provides fast and relevant full-text search functionality.

Key Sphinx features are:

- high indexing and searching performance;
- advanced indexing and querying tools (flexible and feature-rich text tokenizer, querying language, several different ranking modes, etc.);
- proven scalability up to billions of documents, terabytes of data, and thousands of queries per second.

Steps to enable Sphinx Search

- [Download](#) and [install](#) Sphinx on your machine, **supported version is Sphinx 2.2.11 - 2.3.2**
- Go to KBPublisher Admin Area
- Click Settings -> Plugins -> Sphinx Search tab
- Check **Enable Sphinx Search** checkbox
- Click **Save**

Sphinx Settings

- **Enable Sphinx Search** - On, or Off Sphinx (if Sphinx is Off - search is performed by MySQL full text)
- **Test Mode** - if you wish to test Sphinx, you can firstly set it in a test mode. Sphinx search will be activated only by putting 'sphinx:' in front of your query, e.g. sphinx:banana
- **Host** - Sphinx daemon host (default is 127.0.0.1)
- **Port** - Sphinx daemon port (any free port, default is 9306)
- **Bin path** - a directory where Sphinx is installed. You can leave it empty, but if your system does not recognize Sphinx command without path than - you should fill it, e.g. /usr/local/bin/
- **Data path** - a directory where all Sphinx related files will be stored. Defaults to KBP cache directory, but you can change it. It should be writable by Scheduled Task (cron) user.
- **Languages** - set it to your language, if you have documents in another languages, select the available from the drop down list.

Essential facts for Sphinx Search

- All Sphinx tasks are executed by frequently scheduled task (cron)
- Search index is updated every 5 minutes

Sphinx Search Logs

- You can monitor how Sphinx works, what tasks are executed, what is indexed, what is added to index, etc. in Logs -> Sphinx tab

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`**

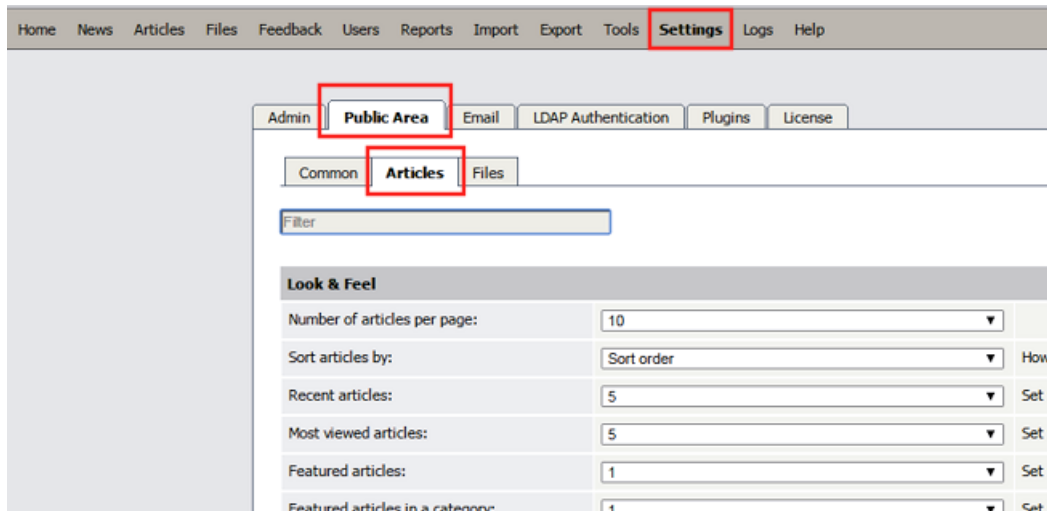
Note:

- **"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.

Look and feel

Change the design

You can customize how and where articles are displayed in the **Settings > Public Area > Articles** tab.



Look & Feel

In this area you can specify

- **Number of articles per page** - Set how many articles appear per page. If there are more articles than the number you set, KBPublisher provides navigation so the reader can move from page to page of the display.
- **Sort articles by** - Choose an option for the default order by which articles are sorted.
- **Recent articles** - Set how many "recent articles" appear. By default this field is set to 5. Set the field to 0 to remove this feature.
- **Most viewed articles** - Set how many "most viewed articles" appear. By default this field is set to 5. Set the field to 0 to remove this feature.
- **Featured articles** - Set how many "featured articles" appear. By default this field is set to 5. Set the field to 0 to remove this feature.
- **Featured articles in a category** - Set how many "featured articles" appear for each category. Set the field to 0 to remove this feature.
- **Display 'Also listed in'** - Set to **yes** to show a list of other categories in which the article is listed. Set to **no** to disable this feature.
- **Others in this category** - Set how many links to other articles in this article's category to display when the user is reading the article. Set to "None" to disable the feature.
- **Display Prev / Next navigation** - Set whether and in what conditions you want to display previous / next navigation for articles in this article's category.
- **Category columns** - Set how many columns to use to display the articles in a category.
- **Article ID zero padding** - If you use an article title prefix (see the next field) you can set here the number of zeros with which to pad a short ID. If you set the padding number to 3, for example, and you have an article with ID 1000 ID 1 will show up as 0001 to provide a display that is easier to read.
- **Article title prefix pattern** - You can opt to prefix each article title with a pattern that can include the article's ID. For example, presume your article with ID 1 has the title "Welcome to our knowledgebase":
 - 'Q{\$entry_id}:' would cause the article to appear in the list as "Q1: Welcome to our knowledgebase".
 - 'Q{\$entry_id}:| Q{\$entry_id} - {\$entry_type}:' would behave as above if the article does not have an entry type. If its entry type were "intro", for example, it would appear in the list as "Q1 - intro: Welcome to our knowledgebase".

Comments

In this section you can control whether and how comments display.

- **Allow add comments** - Select whether to prevent comments, to let only registered users add comments, or let all readers add comments. If you prevent comments in this field, the rest of the fields in this section are ignored.
- **Enable visual confirmation** - Specify whether to use a CAPTCHA confirmation to prevent robotic spam comments. You can require no CAPTCHA confirmation, confirmation for non-registered users, or confirmation for all users adding comments.
- **Comment approval policy** - Specify whether comments must be approved before they are added to the knowledgebase. You can accept all comments without approval, require approval only for non-registered users' comments, or require approval of all comments.
- **Comment subscription** - Specify whether registered users can request a notice to be sent when a comment is added to a particular article.
- **Number of comments per page** - Select the number of comments to appear per page. If the number of comments is larger than the number you specify here, navigation allows readers to move through the pages of comments.
- **Display comments on the article page** - Check this check box to have comments appear on the same page as the article. If this option is not selected, a link appears to a separate comments page.
- **Signature format for commenter** - Specify how the commenter's signature appears at the end of the comment. Options include [first_name], [last_name], [middle_name], [short_first_name], [short_last_name], [short_middle_name], [username], [email], [phone], [user_id]. You can use multiple tags to construct a signature, such as "[first_name] - ID [user_id]".

Rating

You can let users rate articles in your knowledgebase with these settings:

- **Allow rate articles** - Check this check box to let users rate articles.
- **Rating type** - Set the type of rating display as **stars** or **text**.

Feedback

- **Allow feedbacks** - Check this check box to let visitors to send feedback, rating comments, report an article issues, etc..

Send to friend

In this section specify whether and how users can share content with friends.

- **Allow 'Send to friend' option** - You can prevent users from sharing links to comments and articles, let only registered users share links, or let everyone share links.
- **Allow attach article** - Check this check box to let the user share a copy of the article, not just a link to it in the knowledgebase.
- **Enable visual confirmation** - Specify whether to use a CAPTCHA confirmation to prevent robotic spamaction. You can require no CAPTCHA confirmation, confirmation for non-registered users, or confirmation for all users.

Article preview format

In this section set preview options for an article. This is what the user sees before clicking to view the article itself.

- **Article character limit** - Set how many text characters, starting from the start of the first sentence in the article, display in the preview. Set this to 0 to display no extract from the article.
- **Display updated date** - Select this option to display when the article was most recently updated.
- **Display rating** - Select this option to display the article's rating.
- **Display number of comments** - Select this option to display the number of comments this article has.
- **Display number of views** - Select this option to display the number of views this article has had.

Detailed article block

In this section set the information that appears when the user opens the article.

- **Block position** - Set whether the article information block, with information such as the article's ID and when it was last updated, appears to the right or at the bottom of the article.
- **Display Article block** - Select this option to display the article information block.
- **Display Private block** - Select this option to display private, role-protected information.
- **Display author block** - Select this option to display author information. Complete the following field to format the information.
- **Use format for author block** - Format author information. For example, to display the author's informal first name and last name, set this field to "[short_first_name] [last_name]". Tags available include: [first_name], [last_name], [middle_name], [short_first_name], [short_last_name], [short_middle_name], [username], [email], [phone], [id], [company].
- **Display 'Print' link** - Select this option to display an icon the user can click to print the article.
- **Display 'Export to PDF' link** - Select this option to display an icon the user can click to export the article as a PDF file.
- **Print article block in PDF** - Select this option to include the block of article information in the exported PDF.
- **Display number of views** - Select this option to display the number of views the article has had.
- **Display 'Share' link** - Select this option to allow users to share a link to this article on social networking sites. If you select this option, complete the following field.
- **Social networking sites** - Provide links to any social networking sites on which you want users to be able to share links to knowledgebase content. Use a new line for each site. The format for each line is: NAME OF NETWORK | URL with url of article | ICON FOR SOCIAL NETWORK. For Twitter, for example, the entry would be: Twitter | http://twitter.com/intent/tweet?url=[url] | icons/twitter.png

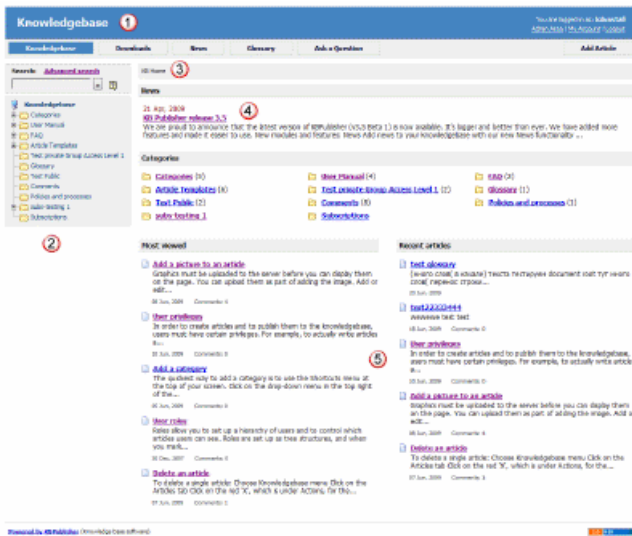
Saving your settings

Click **Save** to save your settings. Click **Set Defaults** to remove any custom settings and restore system defaults.

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**, **Left Menu** or **Intranet**.

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 extra links click [...] button and you can manage extra links.

The breadcrumb trail is displayed after any extra links. It reflects the article you are currently viewing in the knowledgebase.

4. Extra items in menu

The menu options, which are extra links in navigation menu.

The menus are controlled by the **Extra items in menu** field
Settings -> Public Area -> Common -> Extra items in menu

To include extra menu items click [...].

5. 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)

You can 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 set up custom template:

- Log on to the knowledgebase
- Go the **Admin Area**
- Click on the **Settings** menu and choose the **Public Area -> Common** tab
- Click [...] button in the **Page Template** field which will open new window with page settings
- Add a template to **Header** and **Footer** section respectively
- Add custom **Styles** in the appropriate section
- Click **Save** to save the changes
- Go to **Public Area** to see/test your custome template settings

Notes:

- You must be an administrator to do this

This functionality works in version 5.0 and above

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 rating, check **Allow feedbacks**
- 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**.

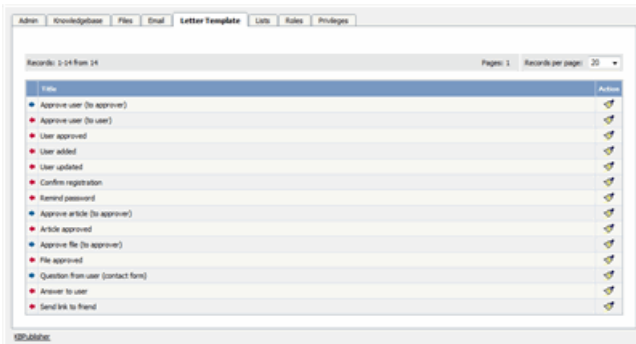
You must have administrator access to change the settings.

Email settings

Setting up emails and communication

Preformatted letters

The **Letter Template** tab is available from the **Settings -> Email** menu. It controls the format of emails that are sent and received by the knowledgebase.

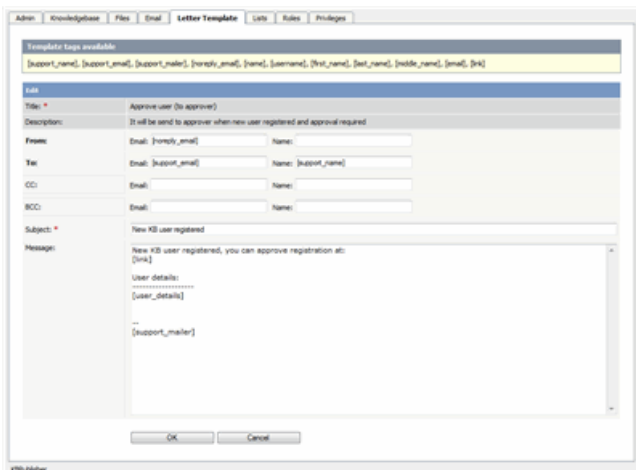


Letters with blue arrows are mails that are received by the knowledgebase administrator. Examples of these include 'ask a question' emails or user registrations. Letters with red arrows are mails that are sent to users. Examples of these include registration confirmation and password reminders.

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.

System emails

You can designate a user, or users, to receive system emails.

- From the **Settings** menu choose the **Email -> Letter Template** 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 **Tools** 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 **Email -> 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



The screenshot shows a web interface for viewing search logs. At the top, there are navigation tabs: 'Scheduled Tasks', 'Mail Post (new)', 'Logs', and 'Search (new)'. Below the tabs is a search filter section with dropdown menus for 'Search In', 'Is Successful', and 'Period', and a search input field with a 'Search' button. Below the filter is a table of search records. The table has columns for 'Date', 'Search string', 'Search In', 'Returned Rows', and 'Details'. The records show various search strings like 'components', 'msi', 'providers', 'dtdof', and 'test' across different dates and knowledge bases.

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)	msi	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)	dtdof	All Knowledge base	1	View
2 months ago (08 Dec, 2010 12:59 PM)	test	All Knowledge base	2	View
2 months ago (08 Dec, 2010 06:17 AM)	test	All Knowledge base	2	View
2 months ago (27 Nov, 2010 02:59 AM)	test	All Knowledge base	2	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.

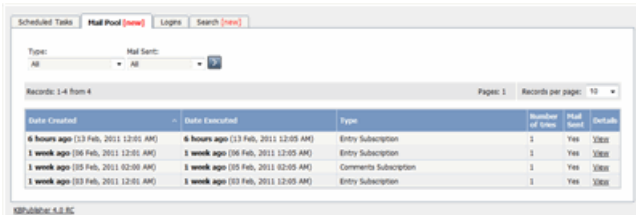
Note: You must have administrator privileges to see log details.

This functionality works in version 4.0 and above

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 'Mail Pool' logs. At the top, there are navigation tabs: 'Scheduled Tasks', 'Mail Pool (show)', 'Logs', and 'Search (new)'. Below the tabs, there is a 'Type' dropdown menu set to 'All' and a search input field. The main content is a table with 4 records. The table has columns: 'Date Created', 'Date Executed', 'Type', 'Number of Times', 'Mail Sent', and 'Details'. The records are as follows:

Date Created	Date Executed	Type	Number of Times	Mail Sent	Details
6 hours ago (13 Feb, 2011 12:05 AM)	6 hours ago (13 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	XXXX
1 week ago (06 Feb, 2011 12:05 AM)	1 week ago (06 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	XXXX
1 week ago (05 Feb, 2011 02:00 AM)	1 week ago (05 Feb, 2011 02:00 AM)	Comments Subscription	1	Yes	XXXX
1 week ago (03 Feb, 2011 12:05 AM)	1 week ago (03 Feb, 2011 12:05 AM)	Entry Subscription	1	Yes	XXXX

At the bottom left of the screenshot, it says 'MPublisher 4.0.BC'.

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.

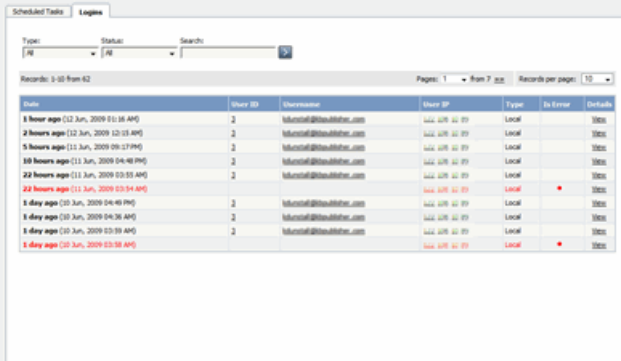
Note: You must have administrator privileges to see mail log details.

This functionality works in version 4.0 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 01:35 AM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
2 hours ago (12 Jun, 2009 12:13 AM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
5 hours ago (12 Jun, 2009 09:17 PM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
10 hours ago (12 Jun, 2009 04:48 PM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
22 hours ago (11 Jun, 2009 03:53 AM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
22 hours ago (11 Jun, 2009 03:04 AM)			144.109.42.01	LOCAL	•	FAILURE
1 day ago (10 Jun, 2009 04:46 PM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
1 day ago (10 Jun, 2009 04:36 AM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
1 day ago (10 Jun, 2009 03:09 AM)	2	tdunn@kbpublsher.com	144.109.42.01	LOCAL		SUCCESS
1 day ago (10 Jun, 2009 03:08 AM)			144.109.42.01	LOCAL	•	FAILURE

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`).

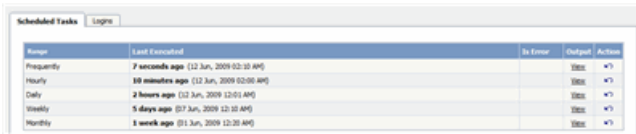
For example: `/home/username/kb_cache/last_remote_login.log`.

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



Name	Last Executed	Is Error	Output	Action
Frequently	7 seconds ago (12 Jun, 2009 02:02 AM)	Success	View	View
Hourly	89 minutes ago (12 Jun, 2009 02:00 AM)	Success	View	View
Daily	2 hours ago (12 Jun, 2009 12:01 AM)	Success	View	View
Weekly	5 days ago (07 Jun, 2009 12:02 AM)	Success	View	View
Monthly	1 week ago (01 Jun, 2009 12:00 AM)	Success	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 6.0

Using SAML SSO Authentication

Security Assertion Markup Language (SAML) is a standard for logging users into applications based on their sessions in another context. This single sign-on (SSO) login standard has significant advantages over logging in using a username and password. SAML is very powerful and flexible, but the specification can be quite a handful.

Steps to enable SAML SSO Authentication

- See [this article](#) for details

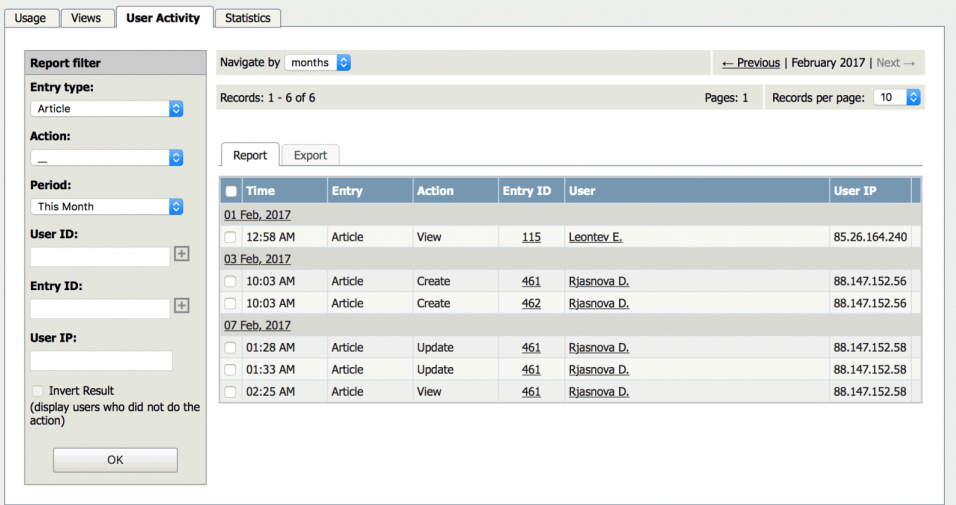
Tracking logins

You can see how your [remote authentication](#) works in the KBPublisher login logs, located under **Logs > Logins**.

For debugging, the most recent remote 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*

The User Activity Report Explained

The User Activity Report lets you view activity on your site so that you can analyze your user base and the state of your content. You can find actions performed by specific users, actions related to specific articles or other types of content, and can even filter your search by date range or IP address.



The screenshot shows the 'User Activity' report interface. On the left is a 'Report filter' sidebar with the following options:

- Entry type: Article
- Action: (empty)
- Period: This Month
- User ID: (empty)
- Entry ID: (empty)
- User IP: (empty)
- Invert Result (display users who did not do the action)

The main area shows a table of activity records for February 2017. The table has columns: Time, Entry, Action, Entry ID, and User. The records are:

Time	Entry	Action	Entry ID	User
01 Feb, 2017				
12:58 AM	Article	View	115	Leontev E.
03 Feb, 2017				
10:03 AM	Article	Create	461	Rjasnova D.
10:03 AM	Article	Create	462	Rjasnova D.
07 Feb, 2017				
01:28 AM	Article	Update	461	Rjasnova D.
01:33 AM	Article	Update	461	Rjasnova D.
02:25 AM	Article	View	461	Rjasnova D.

Note: Report functionality only works when [scheduled tasks are turned on](#).

What reports I can generate?

The User Activity report is very flexible. Here are a few examples of what you can find:

- users who logged in this week
- users who did not log in this week (use the "Invert Result" checkbox)
- articles that were updated last week
- articles that were created this month
- articles that were created this month by specific user
- all of a specific user's actions
- all actions by a user with a specific IP address

What report data is available?

For every entry type, the system logs different actions. The "Actions" dropdown menu in the filter report varies by entry type. For example, the "Publish" action is only available when the entry type is Article Draft or File Draft. As a more extended example, for the User entry type the system logs the following:

- **Create** - Someone created a user
- **Update** - Someone updated a user's details
- **Bulk Update** - Someone updated user details in bulk
- **Delete** - Someone deleted a user
- **Login** - Someone logged in

What are the report filter options?

The Report filter is on the left of the screen, and you can use one or all of these filter conditions:

- **Entry type** - Choose from the available options: ___ (all), Article, File, User, News, Article Draft, File Draft.
- **Action** - Choose from the available options: ___ (all), View, Create, Update, Bulk Update, Delete, Move to Trash, Login, Publish.
- **Period** - Choose from the available options: All, Previous Day, This Week, Previous Week, This Month, Previous Month, This Year, Previous Year, Custom period.
- **User ID** - Enter the numerical ID for a user, or click the + button to select a user from the Users popup. For results already displayed, you can also click on a user's name in the User column and select **Report filter**.
- **Entry ID** - Enter the numerical ID for the entry type, or click the + button to select an entry from the popup.
- **User IP** - Enter an IP address to filter by user IP.
- **Invert Result** - This checkbox extends the report's powerful functionality by displaying the inverse of the results that the currently selected filters would display. For example, you might search for users who have *not* logged in since the middle of last month, or you might want to know which articles have *not* been updated this year.

How are the results displayed?

If there are a lot of entries, the list at the right is broken up into pages, with the number of entries displayed at the top left. Use the navigation options

at the top right to move through the list.

The main display shows the following for each activity log item:

- the time
- the entry type
- the action
- the entry ID
- the user's last name and first initial
- the user's IP address

Can I export this report data?

Yes! See our article about [exporting reports](#) for more information.

Setting up SAML SSO Authentication

The following steps assume that you have an account with a supported identity provider. You need to know the SAML Login URL and have the x.509 certificate supplied by your identity provider. You should also be familiar with the format of the SAML identity response from your SAML provider.

Enabling SAML authentication

1. As a user with administrator privileges, go to **Settings > Authentication Provider**.
2. On the **SAML** tab, check **Enable Single Sign-On**
(make sure that `$conf['auth_remote']` in the file `admin/config.inc.php` is set to 1)
3. Select an **Authentication Mode**, which defaults to *Only SAML Authentication allowed*. The available options are:
 - **Both built-in and SAML Authentication allowed** - User will be able to log in to KBPublisher using SSO and/or built-in authentication.
 - **Only SAML Authentication allowed** - User can only log in using SSO.
 - **Only SAML Authentication allowed, try auto authentication** - User can only log in using SSO and, if possible, auto-authentication on the SAML server will be applied.
4. Enter the following SAML Configuration settings:
 - **Name** - The name for your SSO provider, to be presented on the login page.
 - **Issuer** - Unique identifier for your Identity Provider (typically a URL). In some cases, this is called the Entity ID.
 - **Single Sign-On Service Url** - The SAML Login URL where the Controller will route Service Provider (SP)-initiated login requests. This is required.
 - **Single Logout Service Url** - The URL where the Controller will redirect users after they log out. If you do not specify a logout URL, users will get the KBPublisher login screen when they log out.
 - **Single Sign-On Service Binding** and **Single Logout Service Binding** - You can change the binding for login and logout URLs. Defaults to HTTP-Redirect. The other option is HTTP-POST.
 - **Public X.509 Certificate** - The x.509 certificate from your identity provider configuration.
5. In the **SAML User Mapping Fields** settings, specify how SAML-authenticated users are identified in the KBPublisher Controller:
 - **Remote User Id** - Unique identifier for the user in the SAML response. This value is responsible to identify user in authentication requests. It defaults to the SAML NameID element.
 - **First Name** - The first name for the user corresponding to the KBPublisher First Name field. Given the sample response, this value would be `User.firstName`.
 - **Last name** - The last name for the user corresponding to the KBPublisher Last Name field. Given the sample response, this value would be `User.lastName`.
 - **Email** - The user's email address, corresponding to KBPublisher email field. The value must be unique among all SAML users. Given the sample response, this value would be `User.email`.
 - **Username** - This value corresponds to the KBPublisher username field. The value must be unique among all SAML users. Given the sample response below, the value for this setting would be `User.email`.

SAMPLE RESPONSE

```
<saml:AttributeStatement>
...
<saml:Attribute Name="User.OpenIDName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">adynamo</saml:AttributeValue>
</saml:Attribute>
...
<saml:Attribute Name="User.firstName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">John</saml:AttributeValue>
</saml:Attribute>
<saml:Attribute Name="User.lastName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">Doo</saml:AttributeValue>
</saml:Attribute>
<saml:Attribute Name="User.email" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="xs:string">John.Doo@example.com</saml:AttributeValue>
  </saml:Attribute>
...
</saml:AttributeStatement>
```

6. To map SAML group attributes to KBPublisher privileges and roles, configure the **SAML attribute for Privileges** and **SAML attribute for Roles** settings. The settings you use depends on the structure of the SAML group attribute in the response.

Note: You can skip this step. If you leave these settings empty they will never be rewritten on user login. You can assign required privileges and/or roles later in KBPublisher.

1. Click the ellipsis button in the **SAML attribute for Privileges** field to open the Group-to-Privilege Mapping dialog box.
2. Enter the *SAML group attribute name*, the *SAML group attribute value*, and choose a *KBPublisher privilege* to map to. In the sample response provided below, we map group `User.group` with value `Editor`.

3. Click **Add**.
4. When you have added all mapping rules, click **Done**.

SAMPLE RESPONSE

```
<saml:AttributeStatement>
...
<saml:Attribute Name="User.OpenIDName" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">adynamo</saml:AttributeValue>
</saml:Attribute>
...
<saml:Attribute Name="User.group" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:basic">
  <saml:AttributeValue xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">Editor</saml:AttributeValue>
</saml:Attribute>
...
</saml:AttributeStatement>
```

Attention: If you map SAML groups to KBPublisher privileges, all matched users will be assigned the specified privilege. If you do not have an Unlimited license and the number of allowed staff users is exceeded, the privilege will not be assigned to the user.

Use the same steps to map **SAML attribute for Roles**.

7. Set up **Service Provider** values.
 - **Metadata** - Use this information to register the Knowledgebase with your identity provider.
 - **Public X.509 Certificate** - If your identity provider requires signing and/or encryption, copy the contents of your certificate and paste it here.
 - **Private Key** - If your identity provider requires signing and/or encryption, copy the contents of your private key and paste it here.
 - **Signing algorithm** - Select a signing method for all SAML requests.

Additional configurations

- **Rewrite user on login** - This is the time, in seconds, to rewrite user data on login. Enter *0* to disable updates to user data on login. Enter *1* to rewrite user data on every authentication request.
- **User account info** - This field indicates whether or not the user is able to update his account info. Available options include:
 - **0** - OFF, user can't update his account info
 - **1** - ON, user can update his account info
 - **2** - AUTO, depends on other remote settings

[Important] Note about Remote User ID mapping when switching authentication

If you are switching between **LDAP** and **SAML** authentication, make sure that the Remote User ID mapping value remains the same. If it differs, a new user will be created in KBPublisher.

For example: Using **LDAP** authentication and mapping Remote User ID to "uid", User A is "user-a". If there's a switch to SAML authentication, the Remote User ID should be the same for this user. By default, **SAML** uses the NameID attribute. Therefore, NameID for this user should be "user-a".

Another option is to reset this field in the database. If this field is reset, you do not need to retain an identical value for Remote User ID. Instead, users will be identified by their email address, so you must have the same email for the user. To reset the field, run the below SQL:

```
UPDATE kbp_user SET imported_user_id = NULL;
```