

Table of Contents

Table of Contents	1
Introduction	2
What is KBPublisher?	3
KBPublisher Uses	6
Public Area (front-end)	7
Admin Area (Back-End); Common Actions	10
Searching Knowledgebase	13
User privileges	14
User roles	15
Category types	16
Ask Question and Quick Response	18
Article history	20
Export articles	21
Custom Fields	22
Mobile View	23
Automations	26
Workflows	27
Drafts	28
Set up required reading (Must Read)	29

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

Sign in

Knowledgebase

News

Downloads

Ask a Question

...

Knowledgebase

> FAQ

> User Manual

> Subscriptions

> Getting started

> Glossary

> FAQ

> Policies and processes

KB Home

News

KB Publisher release 7.0 Release Notes

24 Mar, 2019

We are proud to announce that the latest version of KBPublisher (v7.0 release candidate) is now available for preview/testing. If you would like to try out our new features, and are able to provide...

Featured Articles

System Requirements

KBPublisher has very minimal requirements and should work on any modern server. Client Side: Operating System: Any Windows, Mac or Linux Web Browser: Internet Explorer 5.5+ and Gecko browser...

06 Jul, 2019 Views: 107 Comments: 0

How to Create 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,...

06 Jul, 2019 Views: 8 Comments: 0

Most Viewed

Recent Articles

Add an article template

To add a new article template Click on the Knowledgebase menu Choose the Article Template tab Click on Add New. Once you are on the article screen you must complete the following...

17 Dec, 2007 Views: 559 Comments: 0

Add a category

The quickest way to add a category is to use the Shortcuts menu at the top

System Requirements

KBPublisher has very minimal requirements and should work on any modern server. Client Side: Operating System: Any Windows, Mac or Linux Web Browser: Internet Explorer 5.5+ and Gecko browser...

06 Jul, 2019 Views: 107 Comments: 0

Adding Code Snippets

You may want to add code examples, or snippets, to your knowledgebase

KBPublisher navigation gives you quick access to:

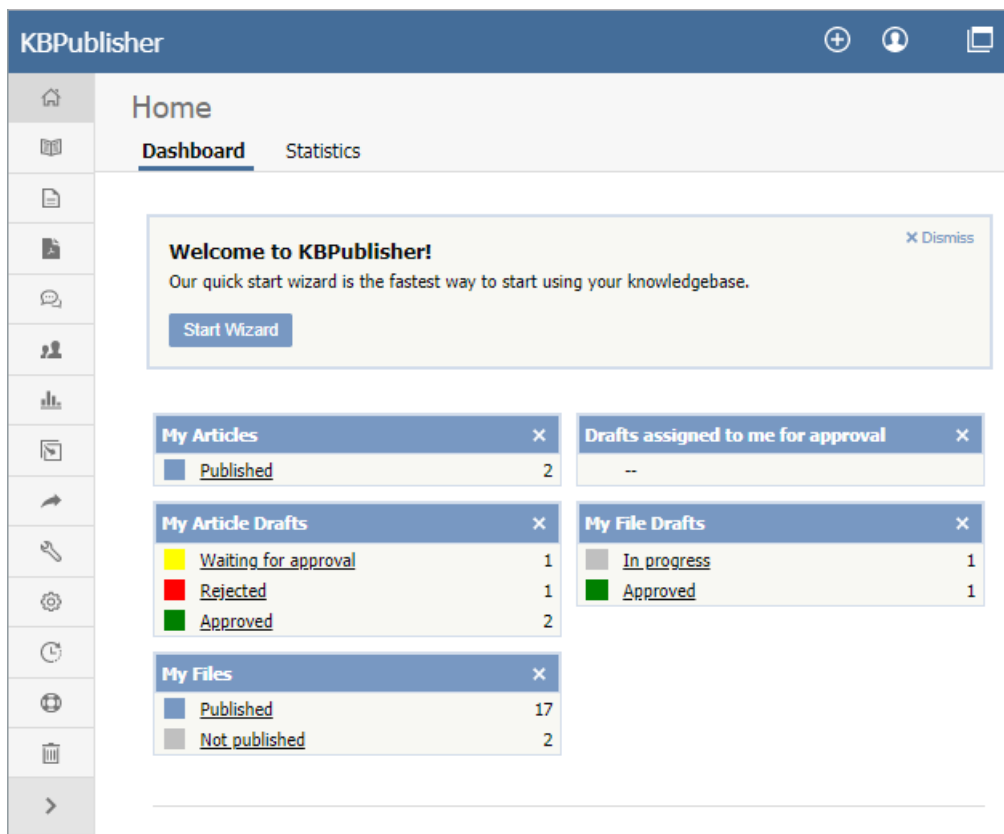
- Articles - read articles in the knowledgebase
- Files - view attached files
- News - read announcements
- Feedback - ability to contact administrator
- Glossary - a glossary of terms
- Comments - users can add comments to articles
- Ratings - users can rate content
- RSS feeds
- Email notifications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

Introduction

4



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

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

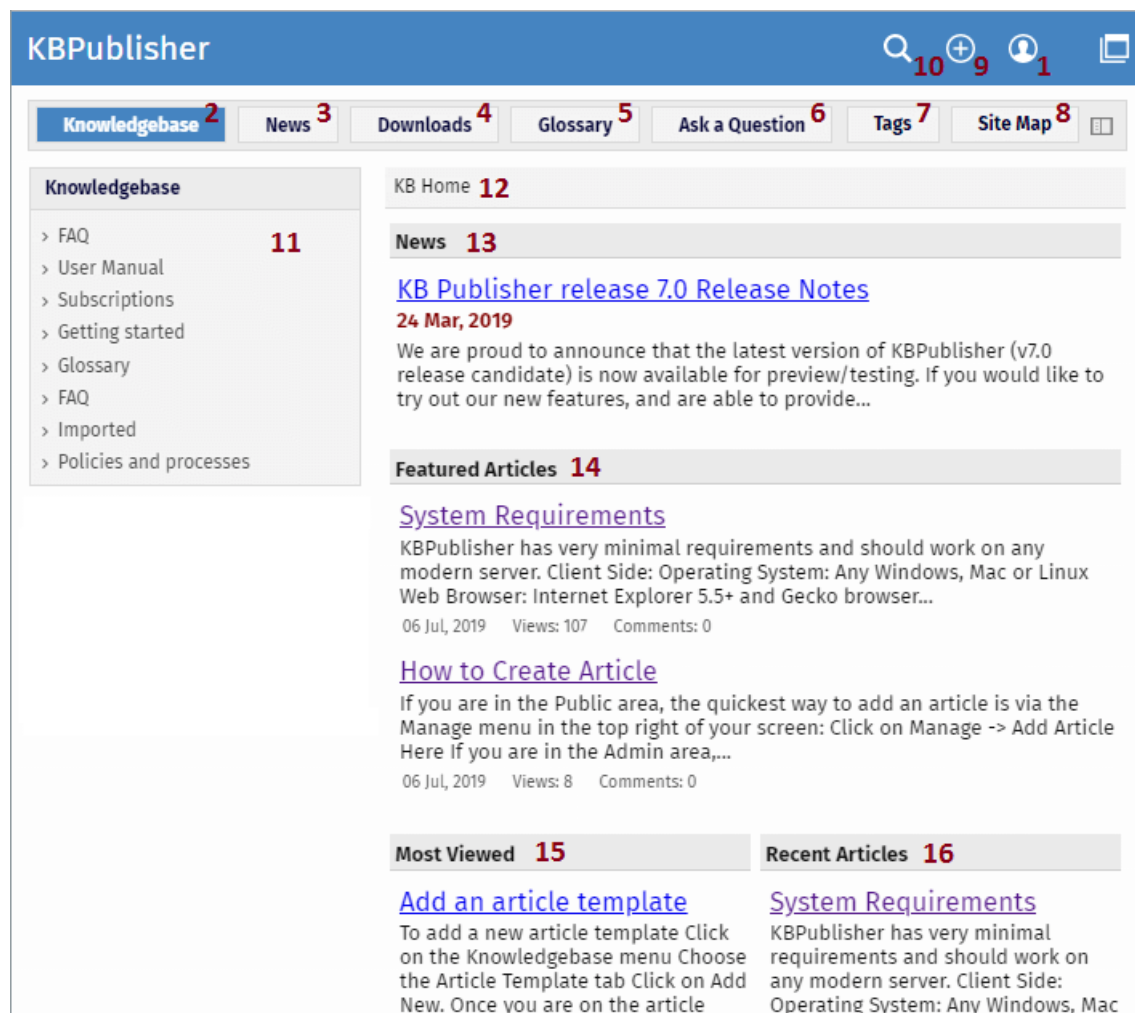
You can use the Feedback option to create a simple help desk request system where the user logs a support request and you supply an answer either by emailing them back, posting an answer on the knowledgebase, or both. Other users can add comments to any postings. You can use the Supervisor function to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

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 **News** to see a full list of news items.
4. 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.
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.

7. **Tags** are keywords and phrases which help readers easily find articles related to specific topics.
8. **Site Map** allows visitors to get the whole map of your knowledgebase and quickly find required section.

Add article

9. If you have contributor or author access, you will also have an icon. When clicking, a menu of commands opens to allow you to quickly add articles, news, files, etc.

Search

10. 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.

Categories

11. 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

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

The actual content is in the main screen

13. News is displayed at the top of the screen.
14. Categories may also be displayed on the main screen. They can be on the left menu, on the main screen or on both.
15. When you first enter Public area, 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.
16. 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.

17. The floating action block displays options you can do to this article. As a viewer you can share the article through socials, email it to a friend, print the article, export in PDF, add a comment, add to Favorites. **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.

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

18. The article block displays additional information about the article. The block shows 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. 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.
19. Other users' comments are displayed at the bottom of the screen. The full comment may be displayed, or just a link to it.

Knowledgebase

- > FAQ
- ✓ User Manual
 - > Installation
 - **System Requirements**
 - > Getting started
 - > After installation
 - > Importing
 - > Remote Authentication
 - > Files
 - > Feedback
 - > RSS
 - > Users
 - > Subscriptions
 - > Getting started
 - > Glossary

[KB Home](#) / [User Manual](#) / [Installation](#) / System Requirements

System Requirements

Article ID: 52

Last updated: 06 Jul, 2019

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

Client Side:

- Operating System: Any Windows, Mac or Linux
- Web Browser: Internet Explorer 5.5+ and Gecko browser (Firefox / Mozilla / Netscape)
- JavaScript: Must be enabled

Server side

- Operating System: Linux, Unix, Windows
- Web Server: Apache Web Server / IIS5 or above
- Database: MySQL 4.1 or above
- Scripting Language: PHP 4.3.0 - 5.2.

This article was: [Helpful](#) | [Not helpful](#)[Report an issue](#)

Article ID: 52

Last updated: 06 Jul, 2019

Revision: 8

Views: 109

Comments: 1

Posted: 01 Nov, 2007 by --

Updated: 06 Jul, 2019 by Smith J.

18

Comments 19[1 Comments](#)[Prev](#)

Installation

[Next](#)

Getting started

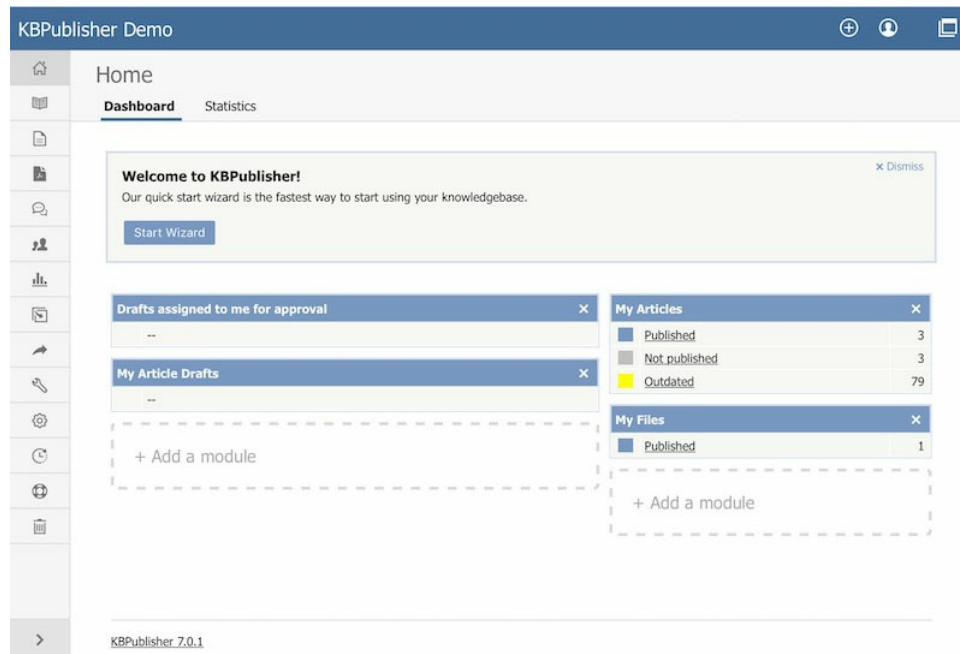


17

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:



This page has two tabs: **Dashboard** and **Statistics**.

To add the information that appears on the **Dashboard** or **Statistics** tab, select that tab, then click the **Add a module** block. 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.

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 **articles** screen because it has the most functionality, but the explanations are applicable for working with **files** and **feedback** in the knowledgebase as well.

KBPublisher Demo

Articles

Articles Drafts Featured Comments Feedbacks Glossary Categories Template

Category: Status: Type: Search:

Records: 1 - 10 of 142 Pages: 1 of 15 Records per page: 10

ID	Posted	Updated	Title	Category	Rating	Views	Status	
487	09 Jun, 2019		Adding Code Snippets	New Category	★★★★★	5		...
482	02 Jun, 2019	04 Jun, 2019	How to create article	Custom fields [2]	★★★★★	7		...
62	03 Nov, 2007	14 Sep, 2016	The category input screen explained	Comments	★★★★★	43088		...
52	01 Nov, 2007	07 Jun, 2013	System Requirements	Installation	★★★★★	1		Preview
106	30 Nov, 2007	29 Nov, 2010	User privileges	Introduction	★★★★★	1		Public View
105	29 Nov, 2007	29 Nov, 2010	Article workflow	Introduction	★★★★★	9		Details
103	29 Nov, 2007	29 Nov, 2010	What are categories?	Categories	★★★★★	8		History: 2
96	26 Nov, 2007	29 Nov, 2010	Bulk update articles	Articles	★★★★★	6		Duplicate
82	05 Nov, 2007	29 Nov, 2010	Import users	Users [2]	★★★★★	2		Edit as Draft
79	05 Nov, 2007	29 Nov, 2010	Delete user	Users	★★★★★	1		Edit
								Move to Trash

KBPublisher 7.0.1

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

To **create a new** record, click the [+] icon and complete the form that appears.

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

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 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.

Filtering

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 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, indicated by __)
 - 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 an asterisk (*) as a wildcard before and/or after the string you enter to broaden the search. For example, *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.

Bulk Actions

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 which appears at the bottom of the page.

Introduction

11

KBPublisher Demo

Articles

Articles

Drafts

Featured

Comments

Feedbacks

Glossary

Categories

Template

Category:

Status:

Type:

Search:

+

...

Records: 1 - 10 of 142

Pages: 1 of 15

Records per page: 10

ID	Posted	Updated	Title	Category	Rating	Views	Status
<input type="checkbox"/> 487	09 Jun, 2019		Adding Code Snippets	New Category	★★★★★	5	...
<input type="checkbox"/> 482	02 Jun, 2019	04 Jun, 2019	How to create article	Custom fields [2]	★★★★★	7	...
<input checked="" type="checkbox"/> 62	03 Nov, 2007	14 Sep, 2016	The category input screen explained	Comments	★★★★★	43088	...
<input type="checkbox"/> 52	01 Nov, 2007	07 Jun, 2013	System Requirements	Installation	★★★★★	105	...
<input type="checkbox"/> 106	30 Nov, 2007	29 Nov, 2010	User privileges	Introduction	★★★★★	119	...
<input checked="" type="checkbox"/> 105	29 Nov, 2007	29 Nov, 2010	Article workflow	Introduction	★★★★★	98	...
<input type="checkbox"/> 103	29 Nov, 2007	29 Nov, 2010	What are categories?	Categories	★★★★★	85	...
<input type="checkbox"/> 96	26 Nov, 2007	29 Nov, 2010	Bulk update articles	Articles	★★★★★	67	...
<input type="checkbox"/> 82	05 Nov, 2007	29 Nov, 2010	Import users	Users [2]	★★★★★	234	...
<input type="checkbox"/> 79	05 Nov, 2007	29 Nov, 2010	Delete user	Users		162	...

Actions with selected

Clear Selection

Adjustable List View

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

- Item **ID**.
- If the article is scheduled, indicated by a **clock icon**.
- If the article is private, indicated by a **key icon**.
- When the article was **posted** and last **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.
- The article's **status**, indicated by a block of color. Hover over the color to see what the color represents.

List fields are adjustable. Right-click the blue header row and select **Customize List** to adjust list fields. You can add, remove, and re-order the fields.

KBPublisher Demo

Articles

Articles

Drafts

Category:

Records: 1 - 10 of 142

ID	Posted	Updated	Title	Category	Rating	Views	Status
<input type="checkbox"/> 487	09 Jun		Adding Code Snippets	New Category	★★★★★	5	...
<input type="checkbox"/> 482	02 Jun	04 Jun	How to create article	Custom fields [2]	★★★★★	7	...
<input checked="" type="checkbox"/> 62	03 Nov	14 Sep	The category input screen explained	Comments	★★★★★	43088	...
<input type="checkbox"/> 52	01 Nov	07 Jun	System Requirements	Installation	★★★★★	105	...
<input type="checkbox"/> 106	30 Nov	29 Nov	User privileges	Introduction	★★★★★	119	...
<input checked="" type="checkbox"/> 105	29 Nov	29 Nov	Article workflow	Introduction	★★★★★	98	...
<input type="checkbox"/> 103	29 Nov	29 Nov	What are categories?	Categories	★★★★★	85	...
<input type="checkbox"/> 96	26 Nov	29 Nov	Bulk update articles	Articles	★★★★★	67	...
<input type="checkbox"/> 82	05 Nov	29 Nov	Import users	Users [2]	★★★★★	234	...
<input type="checkbox"/> 79	05 Nov	29 Nov	Delete user	Users		162	...

Actions with selected

Clear Selection

Customize List

☒ ID

☒ Private

☒ Schedule

☒ Posted

☒ Updated

☒ Title

☒ Category

☐ Author

☐ Updater

☐ Type

☐ Comments

Save

Set Defaults

Close

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.

To force search by article id, type id:[entry_id], which will search articles with this ID, if article exists it will be opened.

To force search by file id, type file_id:[entry_id], which will search file with this ID.

To force search in title only, type title:[search string], which will search articles, files, or news in titles only, depending on which section you search.

To force search by tags, type tags:[tag1],[tag2], which will search articles, files, or news with these tags, depending on which section you search.

If special search is applied search string will be highlighted in green,like this.

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.

Standard

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.

Release notes	Options
KBPublisher v7.0.1 release notes KBPublisher release 7.0.1 fixed several issues found in release 7.0 and added some new features. Added dynamic list options to Files: show recently updated files; show most downloaded files. ... 19 Jun, 2019	
KBPublisher v7.0 Release Notes We are proud to announce that the latest version of KBPublisher v7.0 is now available. We have added some much-requested features and have improved existing features. New Modules and Features ... 30 Apr, 2019	
KBPublisher v6.0.2 release notes KBPublisher release 6.0.2 fixed several issues found in release 6.0.1. CKEditor updated to v4.7.2 Fixed issue with wrong local image path in article API call Fixed issue with resetting custom... 25 Aug, 2017	
KBPublisher v6.0.1 release notes KBPublisher release 6.0.1 fixed several issues found in release 6.0 and added some new features. CKEditor updated to v4.7.1 Updated BING API spell suggestion tool to latest version Fixed issue... 03 Jul, 2017	

Book

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

User Manual v7.0	Options
<ul style="list-style-type: none">Introduction<ul style="list-style-type: none">Category typesArticle historyExport articlesCustom FieldsMobile ViewAutomationsWorkflowsDraftsGetting started<ul style="list-style-type: none">SummaryAdd a CategoryAdd a glossary itemAdd a userFinal stepsAdd an ArticleSingle Sign On<ul style="list-style-type: none">SAML Authentication<ul style="list-style-type: none">Using SAML SSO AuthenticationSetting up SAML SSO AuthenticationConfiguring OneLogin as an Identity ProviderLDAP Authentication<ul style="list-style-type: none">Using LDAP AuthenticationSetting up LDAP AuthenticationRemote Authentication<ul style="list-style-type: none">Using Remote Authentication	

Quick FAQ

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

- [What does the red key mean beside a category, article or file?](#)
- [How do I insert a picture in an article](#)
- [It does not work. What I should do?](#)
- [How to change some localization words, phrases?](#)
- [How does search work? What is search algorithm?](#)
- [Why search does not find words with less than 3,4 characters?](#)
- [Where is client\(end user\) screen?](#)
- [How can I translate KBPublisher to another language?](#)
- [Where can I change look and feel?](#)

What does the red key mean beside a **category**, article or file?

It means that access is restricted. You may need to log on to see view articles, or you may require special user access.

[View as article](#)

[Back to the top](#)

How do I insert a picture in an article

Instructions can be found under [add a picture to an article](#).

[View as article](#)

[Back to the top](#)

It does not work. What I should do?

Set configuration value `$conf['debug_info'] = 1` in file `kb/admin/config.inc.php`, then you can see real sql errors and all php errors. Make sure you properly edited(adjusted) file `kb/admin/config.inc.php`

[View as article](#)

[Back to the top](#)

Quick FAQ (interactive)

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.

- [What does the red key mean beside a **category**, article or file?](#)
It means that access is restricted. You may need to log on to see view articles, or you may require special user access.
[View as article](#)
- [How do I insert a picture in an article](#)
Instructions can be found under [add a picture to an article](#).
[View as article](#)
- [It does not work. What I should do?](#)
Set configuration value `$conf['debug_info'] = 1` in file `kb/admin/config.inc.php`, then you can see real sql errors and all php errors. Make sure you properly edited(adjusted) file `kb/admin/config.inc.php`
[View as article](#)
- [How to change some localization words, phrases?](#)
- [How does search work? What is search algorithm?](#)
- [Why search does not find words with less than 3,4 characters?](#)
- [Where is client\(end user\) screen?](#)

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.

The screenshot shows the KBPublisher interface with the 'Ask a Question' tab selected. The form includes fields for Name (John), Email, Subject (Default / Not sure), Title (User Role), and Question / Comment (How to create new user role?). An attachment field with a 'Browse...' button is also present. Below the form, a green box titled 'Do these answers help?' displays five suggested articles: 'Create new user role', 'User Manual -> Users -> Roles', 'User roles', 'User Manual -> Users -> Roles', and 'Add a user'. A red arrow points from the 'Question / Comment' field to the suggested articles, with text indicating that the Knowledgebase brings up possible articles that might answer the question. The form has 'Send' and 'Cancel' buttons at the bottom.

KBPublisher

Knowledgebase News Downloads Glossary Ask a Question ...

KB Home / Ask a Question

Ask a Question

Name: John

* Email:

* Subject: Default / Not sure

* Title: User Role

* Question / Comment: How to create new user role? Start typing your question here

Attachment: Browse...

And the Knowledgebase brings up possible articles that might answer your question.

Do these answers help?
We have found some articles in our knowledge base that might help to answer your question:

- Create new user role
- ... Role ...
- User Manual -> Users -> Roles
- User roles
- ... Role ...
- User Manual -> Users -> Roles
- Add a user
- ... To add a new user Click on the Users menu ...

Send Cancel

Powered by KBPublisher (Knowledge base software)

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'**.

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.

☐ Do not save revision for this time.

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

KBPublisher

Articles

Drafts

Featured

Comments

Feedbacks

Glossary

Categories

Template

[52], System Requirements

Edit

Details

History (5)

Comments

Feedbacks

Preview

Public View

More ▾

← Back

Delete all revisions

Records: 1 - 5 of 5

Pages: 1

Records per page: 10 ▾

#	Updated	Updater	Comment
7	21 hours ago	Smith J.	...
6	6 years ago		Automatically created revision! ...
5	4 years 4 months ago		...
4	4 years 4 months ago		Adding another item ...
3	4 years 4 months ago		...

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.

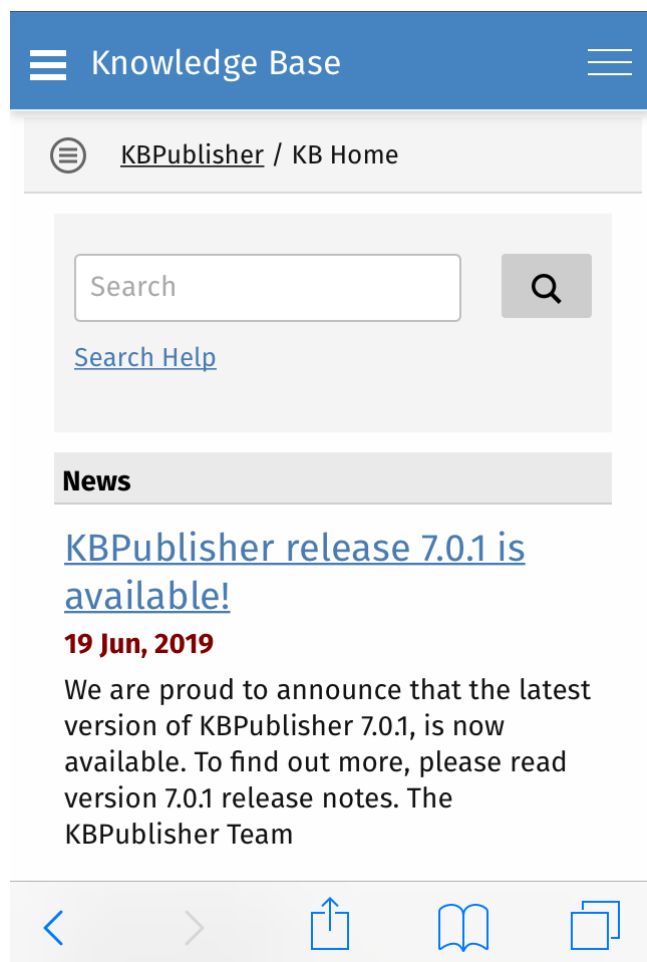
Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

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

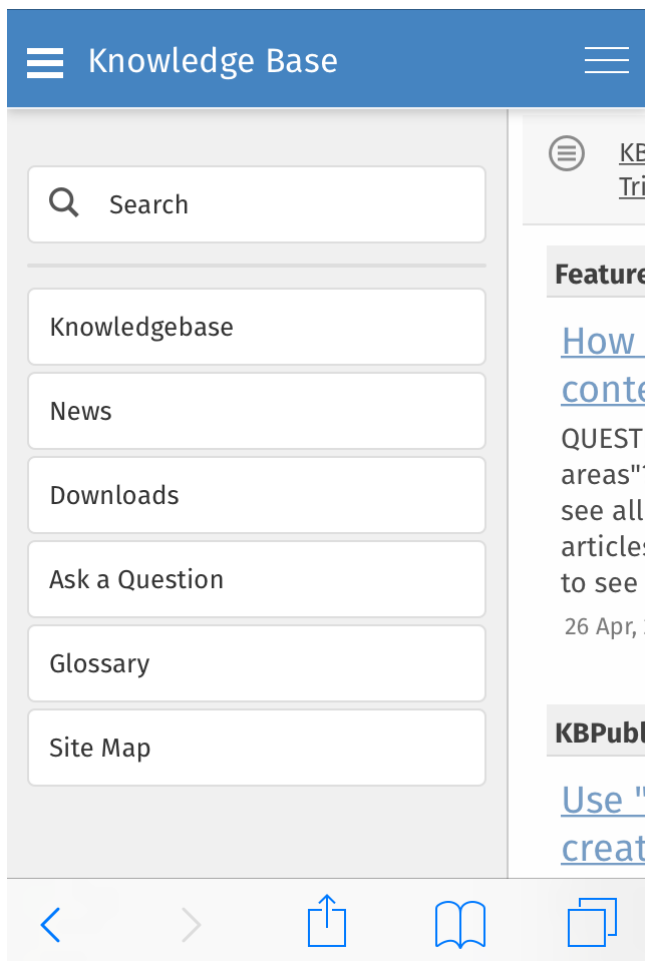
Mobile View is specially optimized working with KBPublisher on your mobile devices - smartphone or tablet. All news and articles are shown as a list to simplify access. Mobile View is enabled for Public Area only.

Some screenshots below.

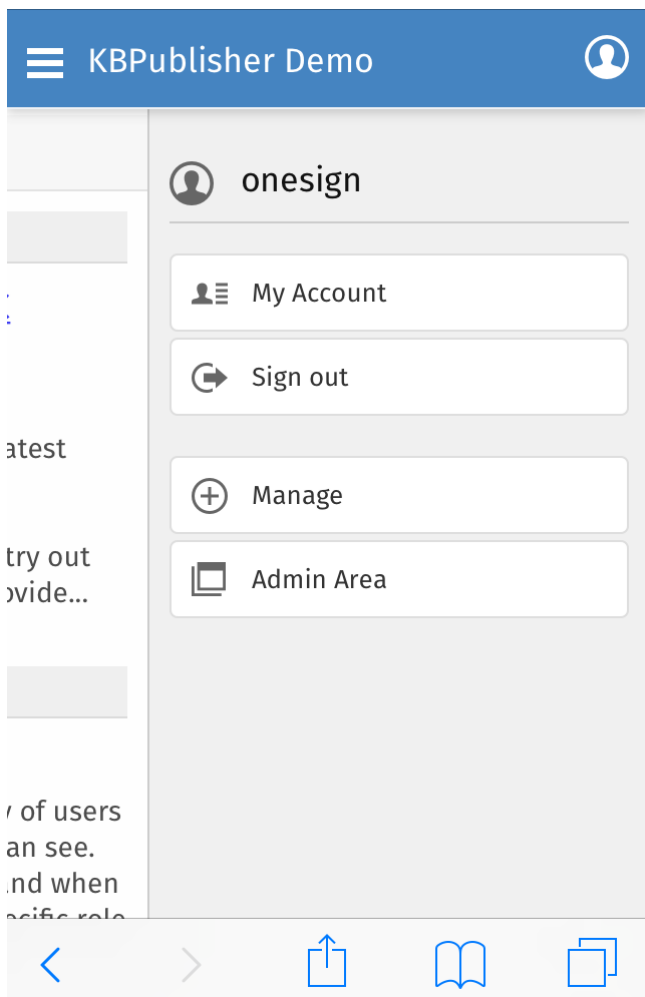
The KBPublisher home page has two banners for navigation and to manage your account: News and Recent Articles.



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.



Knowledge Base

[KBPublisher](#) / [KB Home](#) / Site Map

Site Map

Filter

Articles

Files

News

[Knowledgebase](#)

Collapse All

[Release notes](#)

[User Manual v7.0](#)

This functionality works in version 5.0 and above

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.

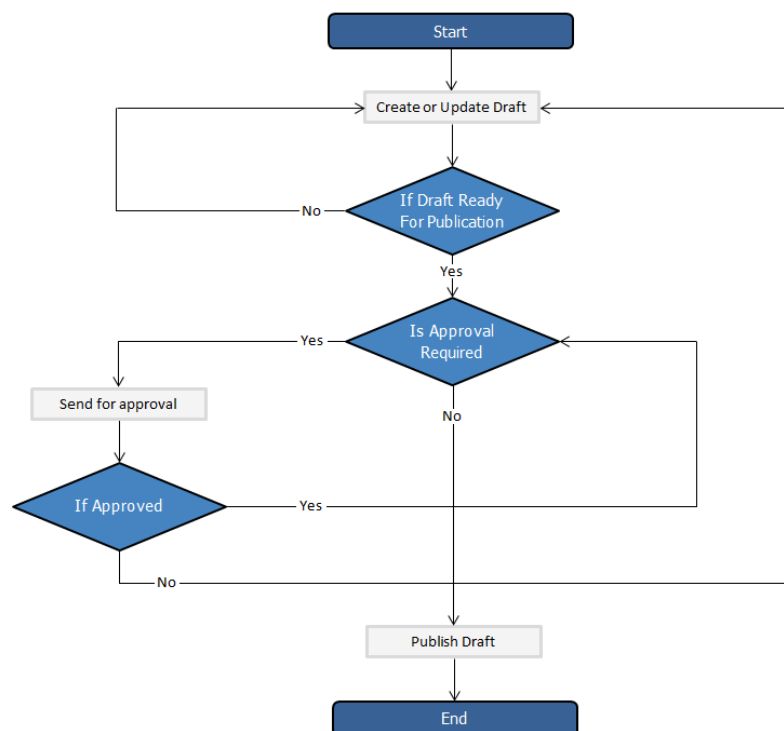
Essential facts for automations

- 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 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.

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.

Set up required reading (Must Read)

Must Read functionality allows you to set up a mandatory reading requirement. It allows you to make sure that members receive information.

When a member signs on to the KB, they are notified that there is a mandatory reading item, and they are directed to it. After reading the article or news, the staff member acknowledges the new information. The system maintains a list of who has and hasn't read the Must Read items.

Set an item as "Must Read" (required reading)

To set a Must Read requirement for an item:

- Create a new article or news item or edit an existing one.
- If you are in an article, click the "Advanced" tab.
- Select the "Must Read" checkbox.
- Fill out Must Read block. For more detail, see the section below.
- Click **Save**.

Set multiple items as "Must Read" (required reading)

- In the articles or news listing, check required articles on the left.
- From the "Actions with selected" menu at the bottom on the page, choose **Set Must Read**.
- Fill out the Must Read block. For more detail, see the section below.
- Click **OK**.

Must Read input block explained

The screenshot shows the 'Must Read' configuration interface. It includes a 'Must Read:' section with a 'Yes' checkbox (checked) and a 'Reset read confirmations' checkbox. Below this are five radio button options for user selection: 'All users', 'All staff users' (checked), 'Specified users', 'Users with a privilege', and 'Users with a role'. A 'Notes' text area is present. At the bottom, there is an 'Expires:' date field set to '06/12/2021' and a 'Force users to read the article' checkbox. Red numbered callouts (1-5) point to these specific elements.

1. Set or unset reading requirements.
If you update an article set as "Must Read" you have a "**Reset read confirmations**" option. This resets all read confirmation, which requires assigned users to confirm it again.
2. Select **who should read** the article.
Audience assignment is very flexible: you can assign all users, all staff users (user with privilege), designate specific users, or assign to users based on specific roles or privileges.
3. **Add notes** that your users will see with the Must Read notification.
4. Set if the **reading requirement will expire**.
If not checked, Must Read will never expire, and the following rules apply:
 - Users who did not confirm it will get a notification until they confirm it.
 - All new matched users will get a Must Read notification.
If an expiration date is specified:
 - Users who did not confirm it will get a notification until they confirm it or the expiration date is reached.
 - All new matched users will get a Must Read notification before the expiration date.
5. **Force users to read** the article.
OFF (not checked) - Users are notified about Must Read items at login, but are allowed to read them later.
ON (checked) - Users are notified about Must Read items at login, and are not allowed to go further until confirming they have read all Must Read items. (*Exception*: Users are still allowed to go to the Admin Area and their own My Account area.)

Must Read Flowchart

