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My Account

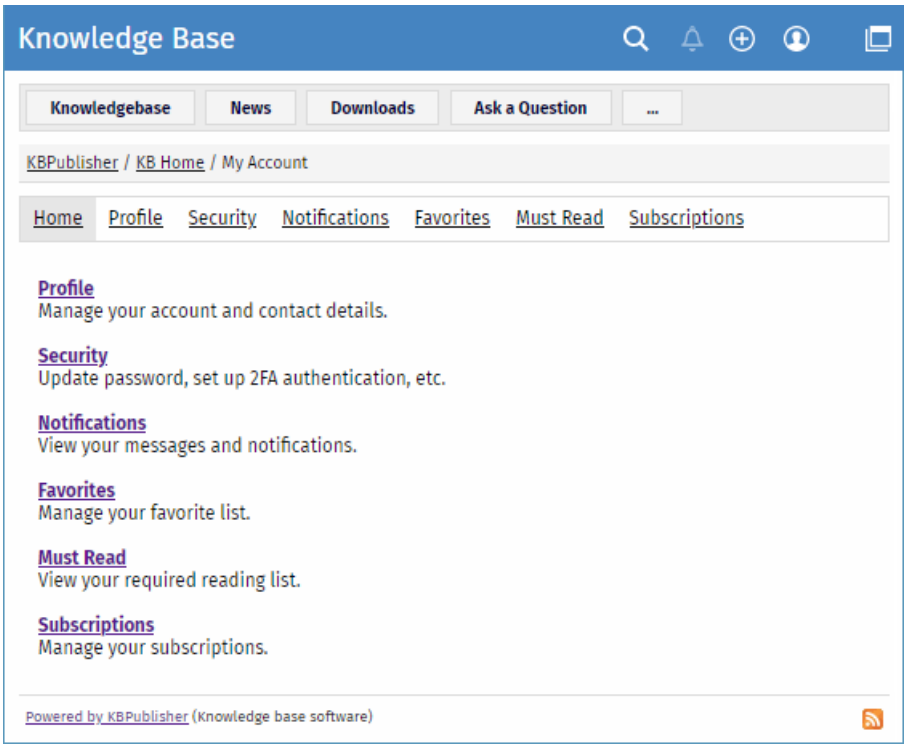
How to use My Account

KBPublisher provides a personal profile page which allows you to do the following:

- Update your profile information
- Enable multi-factor authentication
- Read new notifications
- Read articles that you added to your Favorites list
- Read articles that your Administrator set as must-read
- Subscribe to articles, news, and categories as well as unsubscribe from them
- Change your current password
- Delete your account

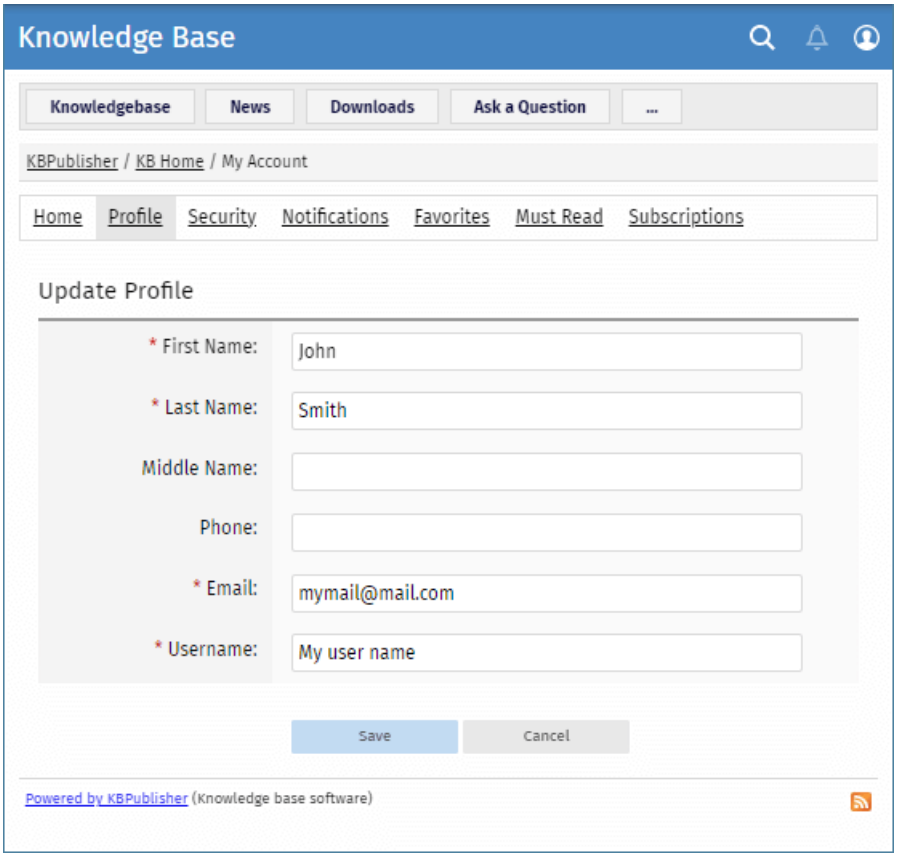
To open your profile page, perform these steps:

- Log in to the knowledgebase.
- In the top right corner, click the account icon, and then select **My Account**. You will see the **Home** page of your personal profile page:



The personal profile page consists of several sections that access you to its features listed above. The**Home** page provides brief information on what you can do in each section.

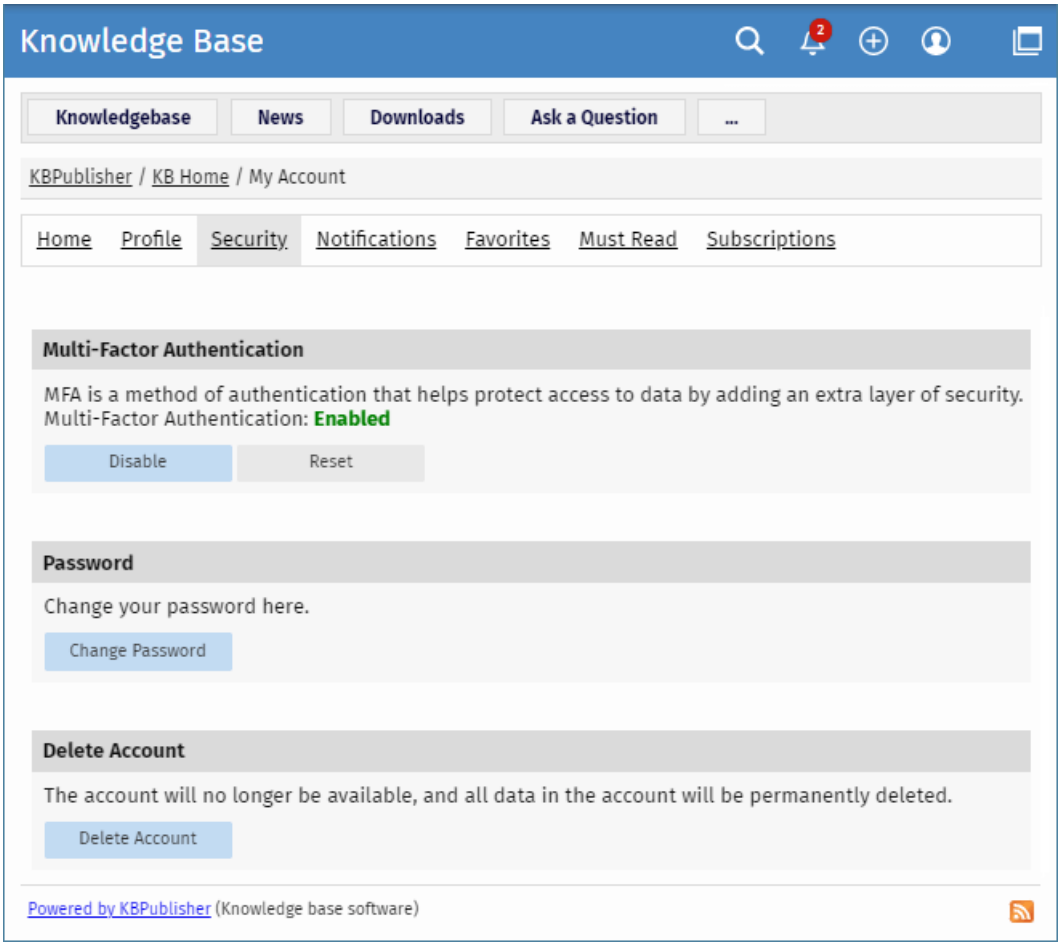
You can view and edit your account info in the **Profile** section of your personal profile page:



To edit your account details, perform these steps:

- Open the **Profile** section.
- Click the **Update profile** button.
- Make necessary changes.
- Click **Save**.

In the **Security** section of your personal profile page, you can set up multi-factor authentication, change your current password, and delete your account.



Setting up Multi-Factor Authentication

Multi-factor authentication (MFA) is an authentication method that helps protect access to your data by adding an extra layer of security. To use MFA, you must have an Authenticator app on your smartphone. The app helps securely verify your identity so only you can access your data in the knowledgebase.

In the **Multi-Factor Authentication** area, you can do the following:

- **Enable** or **disable** MFA.
- **Reset** MFA if you want to change the currently used Authenticator app.

To enable MFA, perform these steps:

- In the **Multi-Factor Authentication** area, click the **Enable** button. In the window that appears, you will see the instruction how to pair your device.
- Follow the instructions, and finally click the **Pair Device** button.
- Make a note of the scratch code so you can use it if you cannot access your Authenticator app.

Now each time you log in to the knowledgebase, type a new code from your mobile Authenticator app.

Changing Password

To change your current password, perform these steps:

- In the **Password** area, click the **Change Password** button.
- On the page that appears, type **Your Current Password** if required.
- In the **New Password** field, type your new password.
  To learn about password policy rules, click the question icon to the right of the field. You can also generate a random password by clicking the corresponding element.
- In the **Verify Password** field, retype the password.
- Click **Save** to apply the new password.

Depending on your knowledgebase settings, after you change your password, you may have to log in again by using your new password.

Deleting Account

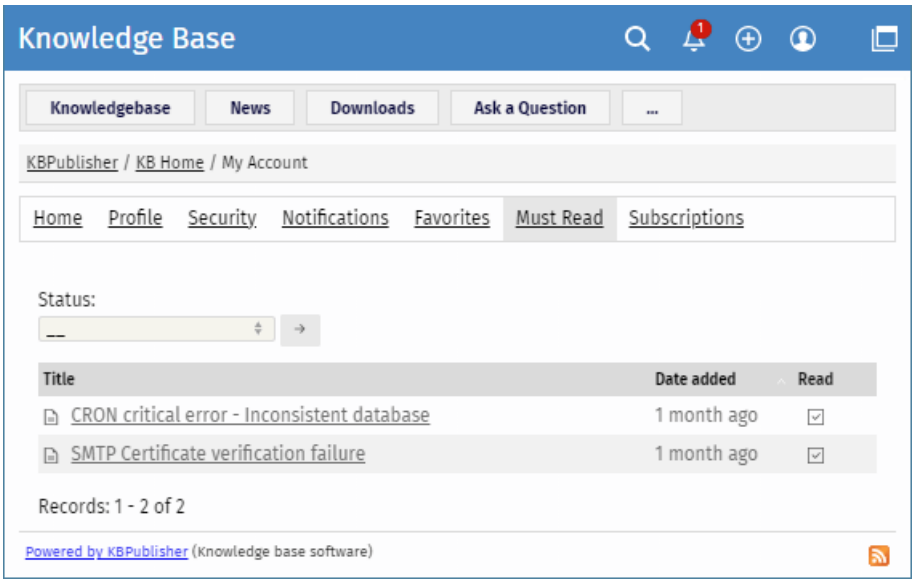
To delete your account, perform these steps:

- In the **Delete Account** area, click the **Delete Account** button.
- In the window that appears, you can write why you are deleting your account if you want to.
- Depending on your knowledgebase settings, perform one of the following actions:
    - Click the **Delete Account** button to delete your account immediately.
    - Click the **Send Request** button to send your request to Administrator. In this case, only Administrator can delete your account. Your account will be available until Administrator confirms and deletes it.

After your account is deleted, all data in the account will be also permanently deleted.

The **Must Read** section contains articles that your Administrator set as must-read.

When you log in to the knowledgebase, you may receive a notification about articles that you must read. You can read them immediately, or read later. If you decide to read them later, you can always find the articles in the **Must Read** section.

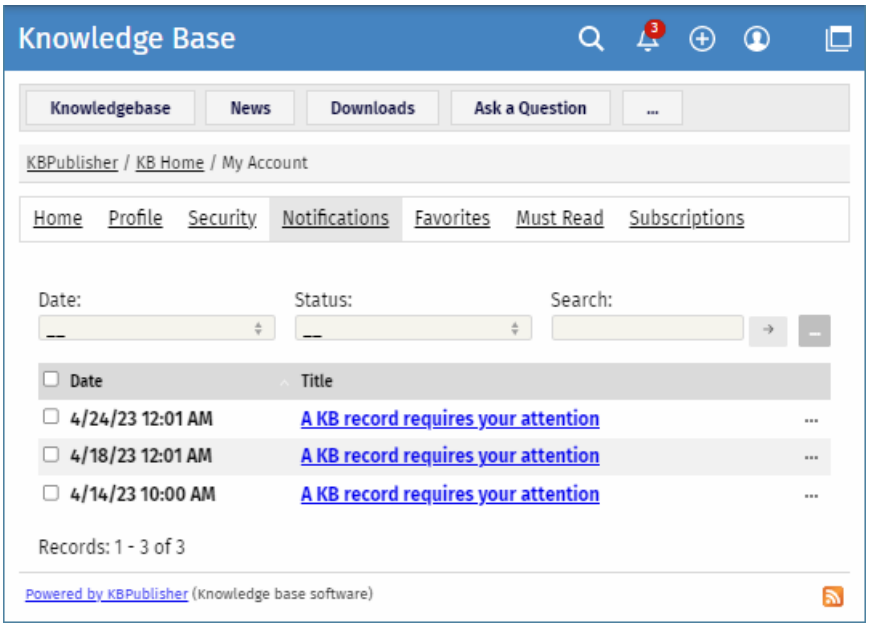


Here you can filter articles by their status, or sort by date when they were set as must-read.
To sort by date, click the name of the **Date added** column.

The **Read** column shows if you have already confirmed that you read the article or not.

On your personal profile page, in the **Notifications** section, you can view a list of all notifications that you have received recently. They serve as reminders that you have important information that requires your attention.

If you have new unread notifications, a badge with number appears on the icon in the top right corner. If you click the icon and select **View all**, you will be also taken to the **Notifications** section.

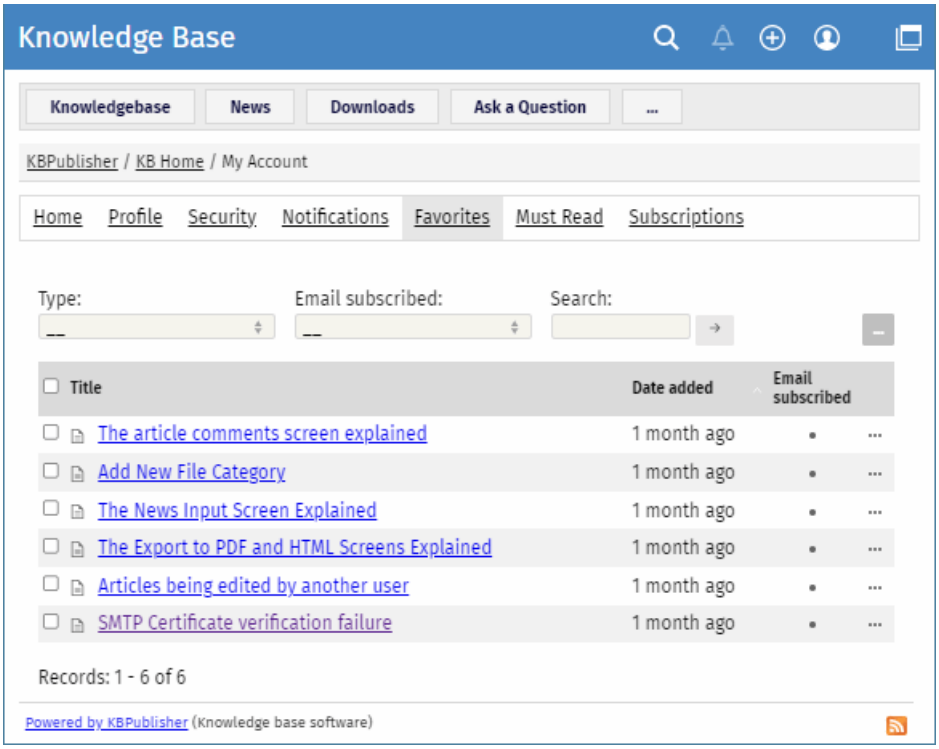


Here you can filter notifications by their date and status. To find a notification, type key words in the **Search** field, and then click [→]. To sort notifications by their date, click the name of the **Date** column. Notifications will be sorted in the ascending or descending order.

You can do the following actions with one or multiple notifications:

- **View** in a separate window.
- **Mark as read** or **unread**. When you mark notifications as unread, a badge with number appears in the top right corner.
- **Delete** notifications from the list.

In the **Favorites** section of your personal profile page, you can read articles and files that you saved to Favorites in Public area.



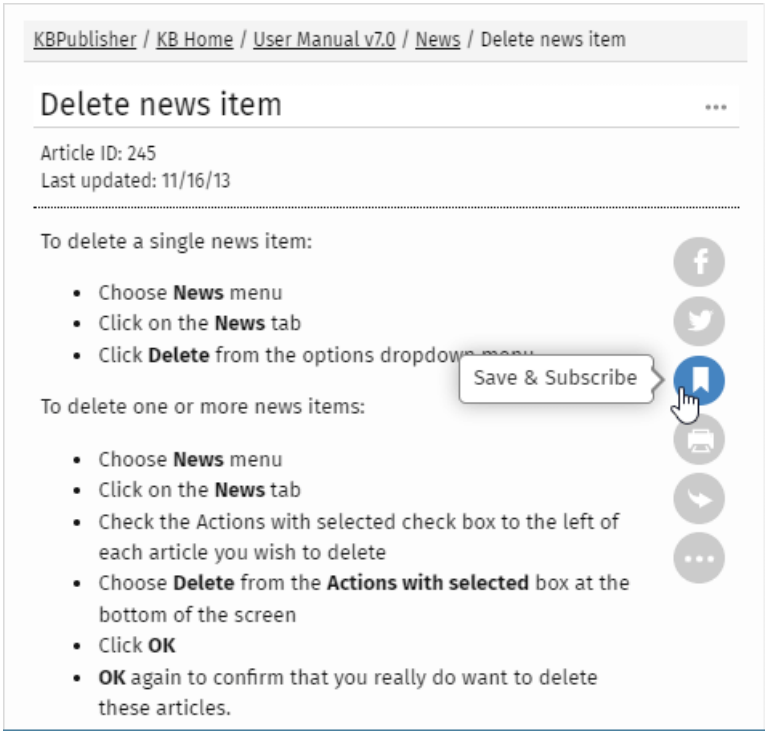
In the Favorites section, you can filter articles by their type and subscription.
To find an article, type key words in the Search field, and then click [→].

Favorites also allows you do the following actions with individual or multiple articles/files:

- Unsubscribe from saved articles and files.
- Subscribe to articles and files and receive email notifications when they are updated.
- Remove articles and files from Favorites list. After you remove an article or file, subscription to the article or file is automatically deactivated.

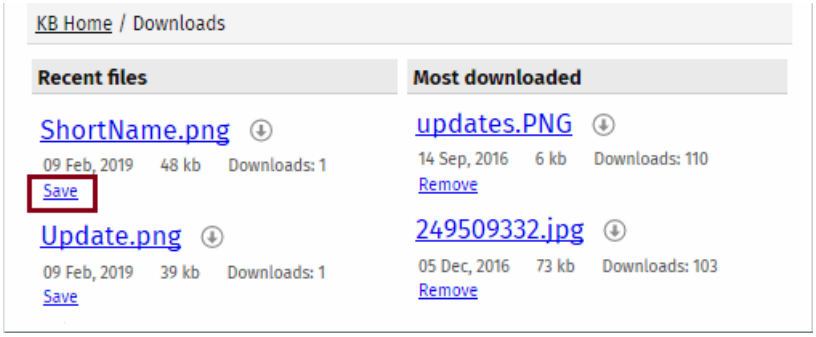
Add an article to Favorites

To save an article to Favorites list in Public area, open the article page and in the right float panel, click**Save and Subscribe**:



Add a file to Favorites

To save a file to Favorites list in Public area, click the **Downloads** tab, browse for a file, and then click **Save** in the file details box:



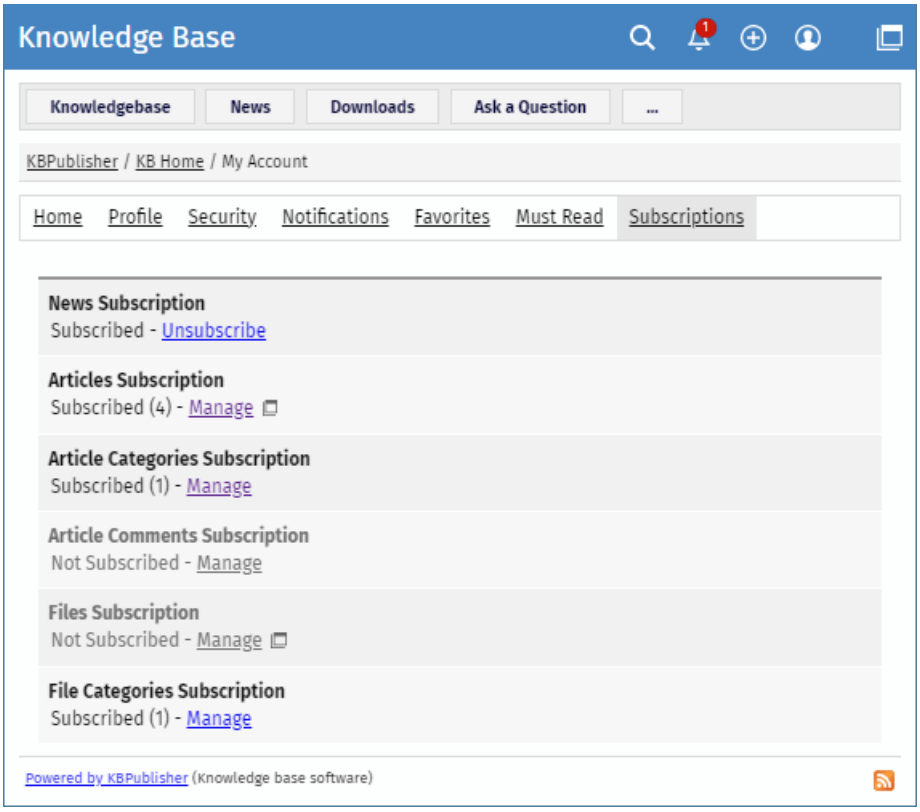
The **Save** option changes to **Remove**. The article or file will be added to your Favorites list and subscription will be automatically activated. From now until you unsubscribe you will receive notification whenever this article or file is updated.

Subscriptions allow you to be notified when:

- A single article is updated.
- Any article in the specified category is updated, or when new articles are added to the category.
- A single file is updated.
- Any file in the specified category is updated, or when new files are added to the category.
- News is added or updated.
- 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 updated.

You can view and manage all your subscriptions in the **Subscriptions** section:



Subscribing to and Unsubscribing from News

To subscribe to or unsubscribe from news under **My Account**, perform these steps:

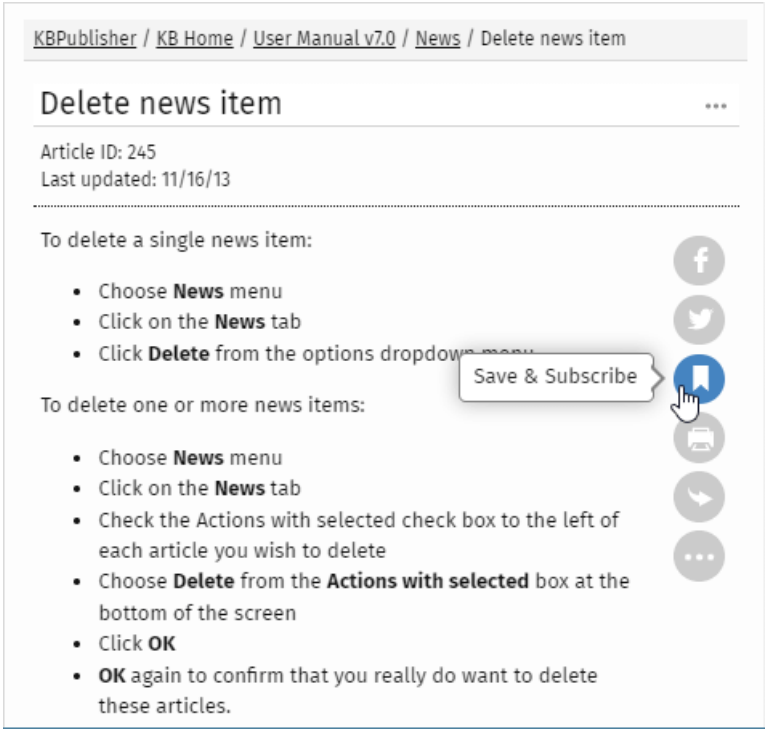
- In **My account**, click the **Subscriptions** section.
- In the **News Subscription** area, click **Subscribe** or **Unsubscibe**.

Subscribing to and Unsubscribing from Articles

There are two ways to subscribe to or unsubscribe from articles.

To subscribe to or unsubscribe from a single article in Public area, perform these steps:

- Open the article page.
- In the right float panel, click **Save and Subscribe** or **Remove**:



To unsubscribe from a single article under **My Account**, perform these steps:

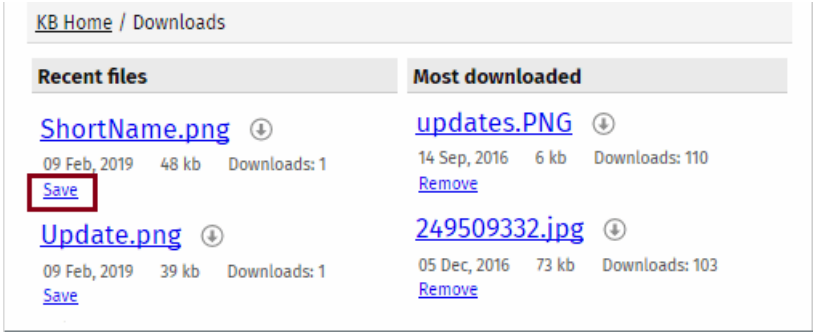
- In **My account**, click the **Subscriptions** section.
- In the **Article Subsciptions** area, click **Manage**.
- In the opened list, find an article that you wish to unsubscribe from. Click the [...] icon and select **Unsubscribe email**.

Subscribing to and Unsubscribing from Files

There are two ways to subscribe to or unsubscribe from files.

To subscribe to or unsubscribe from a single file in Public area, perform these steps:

- In the top left corner click **Downloads** and find a desired file.
- In the file details box, click **Save** or **Remove**.



To unsubscribe from a single file under **My Account**, perform these steps:

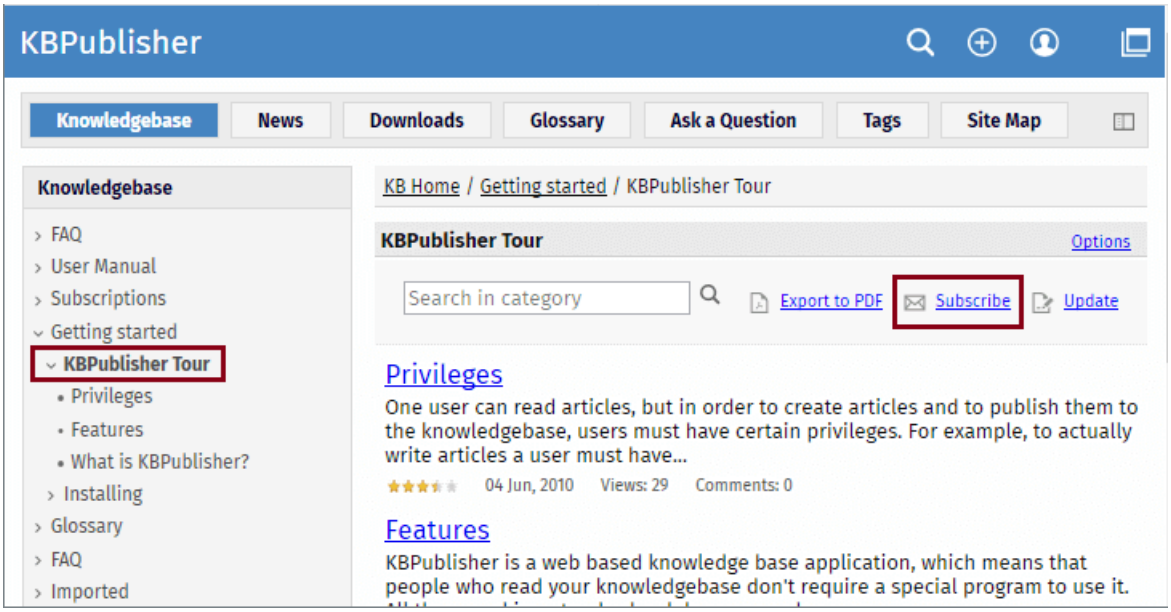
- In **My account**, click the **Subscriptions** section.
- In the **Files Subsciptions** area, click **Manage**.
- In the opened list, find a file that you wish to unsubscribe from. Click the [...] icon and select **Unsubscribe email**.

Subscribing to and Unsubscribing from All Articles/Files in Category

There are two ways to subscribe to or unsubscribe from all articles in a category.

To subscribe to all articles in a category or unsubscribe from them in Public area, follow these steps:

- In the category tree, select a desired category.
- Click **Options** in the top right corner. A panel with additional actions appears.
- Click **Subscribe** or **Unsubscribe**.



To subscribe to all articles/files in a category or unsubscribe from them under **My Account**, perform these steps:

- In **My account**, click the **Subscriptions** section.
- In the **Article Categories Subscription** or **File Categories Subscription** area, click **Manage**.
- Perform one of the following actions:
  - To subscribe, click the [+] icon. In the list, select desired categories, and then click **OK**.
  - To unsubscribe, in the list, find an article/file that you wish to unsubscribe from. Click the [...] icon and select **Unsubscribe**.

Subscribing to and Unsubscribing from Article Comments

When you post your comment to an article, you can subscribe to its new comments by selecting the check box below.

To unsubscribe from comments under **My Account**, perform these steps:

- In **My account**, click the **Subscriptions** section.
- In the **Article Comments Subscription** area, click **Manage**.
- In the opened list, find a desired article. Click the [...] icon and select **Unsubscribe**.

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 **Security**
- In the **Password** area, click the **Change Password** button.
- On the page that appears, type **Your Current Password** if required.
- In the **New Password** field, type your new password.
  To learn about password policy rules, click the question icon to the right of the field. You can also generate a random password by clicking the corresponding element.
- In the **Verify Password** field, retype the password.
- Click **Save** to apply the new password.

Depending on your knowledgebase settings, after you change your password, you may have to log in again by using your new password.

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 adminstrator 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