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Use "Duplicate" to quickly create articles from a template

Often you find you want to create a number of similar articles. Articles that are placed in the same category(s), that have the same roles assigned, the same formatting, and so on. Creating these from scratch is tedious, and you may forget to set some information.

There's a quick way to do this. Create a basic article template, and then use **Duplicate** to create each article.

To create the basic template:

- Add a new article
- Set this up with the formatting you want and assign all other required information such as categories and roles
- Save it, but do not publish it -- set the status to "Draft", for example.

To use the template:

- In article listing click **Duplicate** for the you want to clone
- Change the title, content and meta information
- When you are ready to save, click **Save**

That's it! Now you have a new article based on the template, and your template stays untouched and ready for further use
You may want to create a special status such as "Template" for the master articles. Or you could place them in a special category.

To buy Export plugin

1. Login to your [Client Area](#)
2. Go to **My Licenses** tab
3. Select the license you want to extend support and upgrade on
4. In the **Actions** section under **Buy Export plugin** click on the **Buy Now** link
5. This takes you to the KBPublisher purchase page where you can purchase and.

Actions

Buy Export Plugin:	Buy Now
Upgrade license to:	Upgrade KBPublisher license from Small-Biz to Corporate - $499.99 ▲▼ (Upgrade)

You can upgrade to a higher level license at any time without penalty by paying the difference between licenses.

To upgrade to higher level license

1. Login to your Client Area
2. Go to **My Licenses** tab
3. Select the license you want to extend support and upgrade on
4. In the **Actions** section under **Upgrade license to** select license you want to upgrade to and click **Upgrade** button
5. This takes you to the KBPublisher purchase page where you can purchase an upgrade

To extend support and maintenance period

1. Login to your Client Area
2. Go to **My Licenses** tab
3. Select the license you want to extend support and upgrade on
4. In the **Actions** section under **Extend Support and Maintenance period** click on the **Extend** link
5. This takes you to the KBPublisher purchase page where you can purchase an extension.

To see how much support and maintenance you have left

You can see how long your Support and Upgrade is valid to in the **Support and maintenance** section below.

QUESTION:

Is it possible to create "user areas"?
We would like our customer A to see all our general documentation plus articles specific to company A, customer B to see all general documentation plus articles specific to company B (but not A) and so on.

ANSWER:

Yes, this is possible. You do it using roles and private categories.

Set up roles and categories

First, create roles for the each company:

- Create a role called **Company A** and assign all users from company A to this role
- Create a second role called **Company B** and assign all users from company B to this role.

Next, create private categories:

- Create a category specifically for Company A. Let's call it **Company A documents**.
- For the **Private** field, check **Read** (note that there is a second option here, Write. This controls who can edit an article)
- This brings up a new option, **Access for selected roles**. Select **Company A**

- Select other options required for this category and then **Save** to complete
- Do the same for Company B

Create a general category:

- Create another category -- let's call it it **User Manual** -- that users in both companies can look at. Do not assign a role this time.

Create your articles

Everything is now set up.

- When you create articles, assign them to the appropriate category - **User Manual** category if you want all users to read it, Company A if you only want users from Company A to read it, and Company B if you only want users from Company B to read it.

What users see

Once this is done, users from Company A can log on and read all User Manual articles, plus all Company A articles.

Knowledgebase

> FAQ
> User Manual
> Company A documents

While a user from Company B sees:

Knowledgebase

> FAQ
> User Manual
> Company B documents

QUESTION

Our knowledgebase has three different groups of writers:

- The subject matter experts (SMEs) who write the policies and processes for front-of-house
- The IT team, who write support documents for IT issues
- The sales team, who list prices and features of our various products

How do I set up my knowledgebase so that the three groups can only write articles specific to their area of expertise?

ANSWER

You do this using roles and categories, and set your categories to private write.

Set up roles and categories

First, create roles for the each type of user:

- Create a role called **SME** and assign all your subject matter expert writers to this role
- Create a second role called **IT** and assign all your IT writers to this role
- Create a third role called **Sales** and assign all your sales writers to this role

Note that you don't have to restrict these roles just to writers, it can include all your sales team, IT group and subject matter experts. The user's privilege still controls whether they can write articles or not.

Next, create private categories:

- Create a category for policies and processes
- For the **Private** field, check **Write** (Write restricts write access to the category but allows everyone to read it)
- This brings up a new option, **Access for assigned roles only**. Select **SMEs**

- Select other options required for this category and then **OK** to complete
- Do the same for IT and Sales

Create your articles

Everything is now set up.

- Only subject matter experts can create or update articles in the SME category
- Only IT people can create articles in the IT category
- Only Sales people can create articles in the Sales category

All users can read all articles, however.

This functionality works in version 3.5 and above

How can I add many articles to the same category but not have to go and find the category from the list every time?

Sometimes, when you're adding lots of articles at once, it's a pain to have to hunt through the category list each time to put it into the right place.
Here is a way you can do it quickly.

Set a category filter. Choose the category from the drop-down list of categories on the Articles tab in the Knowledgebase area and click **go** to set the filter. When you click "Add New" this category will be assigned by default.

How can I change authentication session timeout?

To change the session timeouts:

- Log in to Admin area
- Click on **Settings**
- Choose **Admin** tab
- Under the **Security/Privacy** tab, set the **session expires (in minutes)** to the required timeout in minutes.
  If you don't want the session to timeout at all, set this to 0. Your session should remain valid until you close your browser.

If it does not work as expected check the following values in your php settings.

1. session.cookie_lifetime (Default: **0**)
   - session.cookie_lifetime specifies the lifetime of the cookie in seconds which is sent to the browser.
   - a value of 0 means "until the browser is closed"
2. session.gc_maxlifetime (Default: **1440**)
   - session.gc_maxlifetime specifies the number of seconds after which data will be seen as 'garbage' and cleaned up.
   - garbage collection occurs during session start.

Tip:

- Do not forget to restart web server if you change php settings.

How to Install a Language Pack

First check if required language is not in a installed

- Log on to the knowledgebase
- Go the **Admin Area**
- Click on the **Settings** menu and choose the **Admin** tab
- See **Langauage** setting for available languages
- Choose requred language

If you can't find the desired language on the list, see how to install it below.
Language packs are available from the KBPublisher [download area](#)

- Download the language pack you desire
- Unpack it (The top-level folder of the language pack is named for the language, e.g. 'en' for English, 'de' for German)
- Copy the unpacked files to the **[kbp_dir]**/**admin/lang** directory of your knowledgebase
- Follow the steps above to set up language

This functionality works in version 4.0 and above

Use Insert Video button in HTML editor

Upload the file to the server using the **Video** button in HTML editor

- Click on **Video** icon ![icon] in HTML editor toolbar
- **Upload** video or choose from server
- Fill required fields
- Click **OK**

Use Insert/Edit button in HTML editor

Upload the file to the server using the I**nsert/Edit link** in HTML editor

- Click on **Insert/Edit** icon
- Click on the **Upload** tab
- **Browse server** to find your file

Change the HTML source code to point to the video

- Click on the **Source** button in the HTML editor to update the HTML
- Replace the video link that you just created from:

  /kb_upload/file/video.mp4

  to:

  <video width="320" height="240" controls="controls">
      <source src="http://www.kbpublisher.com/kb_upload/file/video.mp4" type="video/mp4" />
      Your browser does not support the video tag.
  </video>

  Where *video.mp4* is the name of your video file. Use your own width and height values to suit, or you can remove the width and height altogether, or use only width or only height.

  For further information, see the W3C video tag specification.

How Can I Route a Approval email Based on the Category?

QUESTION:

Is it possible to specify who receives 'Aprove Request' emails based on the category in which the submitted article is posted?

ANSWER:

Yes, you do this by assigning a supervisor for the category.

To assign a supervisor:

- Log in as an admin user
- Select the **Articles** menu
- Choose the **Categories** tab
- Click on **Feedback Subjects**
- Edit a category (or add a new one)
- Click on the Supervisor folder icon to **add new** supervisor
- This brings up a list of users to select from
- If the user is not yet in the list, add the user
- Once your user is in the list click **Assign**
- This brings you back to the **Category** screen. The name of the person who is to receive emails is now listed in the **Supervisor** field
- Click **Save**.

When you return to the **Category** listing screen the name of the supervisor is listed for the category.

QUESTION:

Is it possible to specify who receives 'Ask a Question' questions based on the question type?

ANSWER:

Yes, you do this by assigning a supervisor for the subject.

To assign a supervisor

- Log in as a admin user
- Click on **Tools** menu
- Choose the **Lists** tab
- Click on **Feedback Subjects**
- Edit your feedback subject (or add a new one)
- Click on the Supervisor folder icon to **add new** supervisor
- This brings up a list of users to select from
- If the user is not yet in the list, add the user
- Once your user is in the list click **Assign**
- This brings you back to the Feedback Subject screen on the List tab. The name of the person who is to receive emails is now listed in the Supervisor field
- Click **OK** to save your changes.

When you return to the Feedback Subjects screen the name of the supervisor is listed against the subject.

How Can I Move KBPublisher to Another Server?

Moving KBPublisher to a new server is a relatively simple process, provided you copy all files and retain the same file structure.

To do so you need to:

- Backup the database and copy it across to the new server
- Backup the KBPublisher folders and any files in them, and copy them across to the new server
- Copy any local files across, and manually change the links in the database if required
- Install any third-party tools you use
- Set up scheduling.

If you wish, you can rename your database and/or move your folders around, but the instructions below do not cover that.

Before you start

- It goes without saying that you need to backup everything. Database and files. A physical copy on your hard disk somewhere.
- If you have used local files (see local files section below), make sure that you know where all the files are and what you will need to copy across.

The database

The database contains your articles, your users and your settings and while you can reinstall pretty much everything else (except uploaded files) by re-installing KBPublisher, no-one can fix a database that isn't there.

1. Backup the database and restore it on new server.
   Full instructions on backing up and restoring a database can be found here.
   Check the new server to ensure the database is there before going any further.

KBPublisher files

Backup the directories and copy them across to the new server. Keep the same directory structure.

The directories you need to copy are:

2. The main KBPublisher directory. This is directly under the public-html folder, and will be usually be named *kb* or *kbp*, depending on how KBPublisher was installed initially
3. The kb_files directory. This contains all the files you uploaded using the Files module.
   To find the exact name/location of this directory: click on the **Settings** menu, choose the **Admin** tab and check the **Files directory** field
4. The kb_upload directory. This is the folder that contains all your images and any other uploaded files via HTML editor.
   To find the exact name/location of this directory: click on the **Settings** menu, choose the **Admin** tab and check the **HTML editor file directory** field

Local files

Local files are files which were already on the server and which you then linked to the knowledgebase. To add local files you would have added them by either clicking on the **Files** menu and choosing **Add Local File** (these files were already on the server and you effectively just linked them to the knowledgebase), or by setting directory rules by clicking on the **Files** menu, then assigning directories in the **Directory Rules** tab.

If you haven't done either of these things then you don't have any local files to copy and can ignore this part.

UPDATE kbp_file_entry SET directory = replace(directory, '/home/old/file', '/home/new/file');

5. Copy any local files across to the new server.
   Unfortunately, we can't tell you where these files will be, as they will be unique to your site.
   Retain the same file structure if you can, as it will be easier.
6. If you move keep the same directory paths and names on the new server everything should work. (You can test this when you log on to the knowledgebase by trying to open one of these local files.) If, however, the paths have changed, then you need to write one-line find-and-replace statements in SQL to replace old path to new one.

   For example, if the old path is */home/old/file* and the new one is */home/new/file* then your search and replace will be something like:

Install any third-party tools

7. Install third party tools such as xpdf and catdoc on the new server if required.

Update the config file

Now that everything is on the server you need to update the configuration file to point to the new server.

8. Update **admin/config.inc.php** to match the new server values.
   You need to change anything that points to a path on your server, which may include:

- $_SERVER['DOCUMENT_ROOT']
- $_SERVER['HTTP_HOST']
- $conf['cache_dir']
- $conf['php_dir']

Update settings

You should now be able to log on to KBPublisher.

9. Log on to your knowledgebase as an admin user
10. If you are using Export Plugin, Click on the **Settings** menu, choose the **Plugins** tab, and set the **HTMLDOC installation path** to point to the new location where it is installed
11. Click on the **Settings** menu, choose the **Admin** tab, and

- Update the **files directory** to point the new file directory
- If you are using XPDF, set the **XPDF installation path** to point to the new location where it is installed
- If you are using Catdoc, set the **Catdoc installation path** to point to the new location where it is installed
- If you are using Antiword, set the **Antiword installation path** to point to the new location where it is installed

10. Click on the **Settings** menu, choose the **Admin** tab, and update the **HTML Editor file directory** to point the the new upload directory
11. Click on the **Settings** menu, choose the **Email** tab and set correct values if required
12. If you use a custom template, click on the **Settings** menu, choose the **Public Area -> Common** tab and change the **template page to load** to point to the new location of the HTML template

Set up scheduling on the new server

Scheduling and alerts are cron jobs and must be set up on the new server.

15. [Set up scheduled tasks](#).

That's it. You're done. Your knowledgebase is on the new server and should be working exactly like the old one.

Licensing and right to run

Please note that before you run KBPublisher on the new server you should completely remove it from the old one. Failure to do so may lead to a licences violation.

Your purchase of a KBPublisher license grants you the right to make use of a single instance of the software. You may temporarily install a second instance of KBPublisher on an internal development server for testing and deployment planning, but only one instance of KBPublisher shall be in operation (available for access to your admin users or end users).

How can I do a mass find and replace in articles?

You can write one-line find-and-replace statements in SQL.
To find a string in a certain field and replace it with another string:

UPDATE [table_name] SET [field_name] = REPLACE([field_name],'[string_to_find]','[string_to_replace]');

To not affect date updated for the articles use following sql:

UPDATE [table_name] SET [field_name] = REPLACE([field_name],'[string_to_find]','[string_to_replace]'), date_updated=date_updated;

To find what articles will be affected:

SELECT [field] FROM [table_name] WHERE [field_name] LIKE '%[string_to_find]%';

Example: replace "apple" to "banana" in all articles

UPDATE kbp_kb_entry SET body = REPLACE(body,'apple','banana'), date_updated=date_updated;

You can set KBPublisher to use secure socket layers (SSL) for the whole site or for key functions. SSL is a security measure that establishes an encrypted link between the server and the client computer trying to access it. This protects data being sent in either direction (uploaded or downloaded) from being stolen by a hacker or a malicious program. When you see the URL (web address) of a site or application beginning "https:" instead of "http:", SSL is active for that URL.

When SSL is enabled and someone tries to access your knowledgebase using a URL beginning "http:", KBPublisher automatially changes the address to use the encoded "https:" address.

To enable SSL for KBPublisher

1. Make sure your web server is configured to work with SSL.
2. Edit the file kbp_dir/admin/config.inc.php, updating the variables according to the options below:

Variables

To enable SSL for your knowledgebase, set one or both of these variables in config.inc.php to "1":

- $conf['ssl_admin'] - controls SSL for the admin area
- $conf['ssl_client'] - controls SSL for the public area

Set the variable to "0" to turn SSL off for that area.

Using a custom port

By default, KBPublisher uses port 443 for SSL. You can specify a different port number by replacing "1" with the port number. If you want to use port 55, set *ssl_admin* or *ssl_client* like this:

- $conf['ssl_admin'] = 55

Example Configurations

The Admin area and the Public area use SSL:

- $conf['ssl_admin'] = 1;
- $conf['ssl_client'] = 1;

The Admin area uses SSL, but the Public area does not use SSL:

- $conf['ssl_admin'] = 1;
- $conf['ssl_client'] = 0;

The Admin area and the Public area use SSL through port 55:

- $conf['ssl_admin'] = 55;
- $conf['ssl_client'] = 55;

Fixing too many redirects issue

In some cases when everything adjusted correctly your may have "Too many redirects ..." error.
Try add below line to file /kbp_dir/admin/config.inc.php

- $conf['ssl_skip_redirect'] = 1;

How can I sort categories?

You must be in the Admin area.

- Under the **Articles** menu, open the **Categories** tab.
- Filter the list by selecting a category with child categories you want to reorder. Note: You can only re-order one level in a time.
- Click the button with three dots **[...]** in the top right corner.
- Choose **Reorder** from the popup menu.
- Rearrange the categories by dragging and dropping them in the results list.
- Click **Save**.

You can downgrade to a lower level license by paying the support price for the license.

To downgrade to lower level license

1. Login to your Client Area
2. Go to **My Licenses** tab
3. Select the license you want to downgrade
4. In the **Actions** section under **Downgrade license to** select license you want to downgrade to and click **Downgrade** button
5. This takes you to the KBPublisher purchase page where you can buy a downgrade

How Can I Sort Articles?

You must be in the Admin area.

- Under the **Articles** menu, open the **Articles** tab.
- Filter the list by selecting a category with articles you want to reorder, and then clicking the right arrow button.
- 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**.