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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/htmldoc/>
- 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 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.

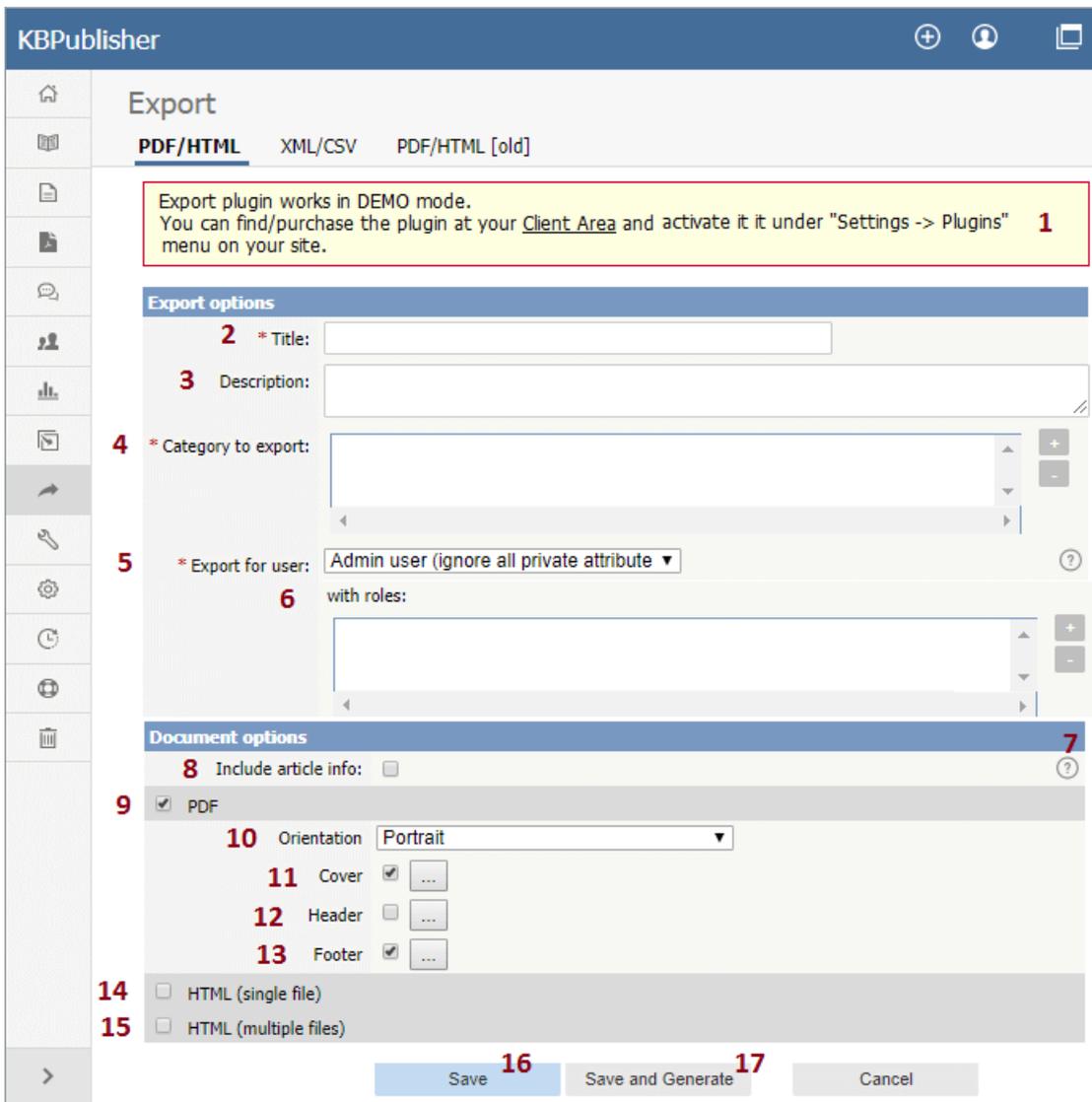
The screenshot shows the KBPublisher interface. At the top, there's a header with 'KBPublisher' and some icons. Below that is a navigation sidebar with icons for home, list, document, search, user, bar chart, folder, back, settings, and a chevron. The main content area is titled 'Export' and has tabs for 'PDF/HTML', 'XML/CSV', and 'PDF/HTML [old]'. A yellow message box with a red border says: 'Export plugin works in DEMO mode. You can find/purchase the plugin at your Client Area and activate it it under "Settings -> Plugins" menu on your site.' Below this is a search bar with a search icon and a plus button. A summary line shows 'Records: 1 - 7 of 7', 'Pages: 1', and 'Records per page: 10'. A table follows with columns: Title, Category, Last generated, and an options column. The table contains seven rows of export records.

Title	Category	Last generated	
test insert	After installation	2 years 8 months ago	...
test	Article Templates	4 years 6 months ago	...
test	Article Templates	4 years 7 months ago	...
test	All categories (All KB)	4 years 7 months ago	...
another one	Categories	4 years 8 months ago	...
User Manual	User Manual	4 years 3 months ago	...
test	User Manual	5 years 4 months ago	...

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** 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 options button opens a menu with the commands:
 - The **Details/Download** action allows you to view details of the specific export and download the file.
 - The **Update** action allows you to update the export.
 - 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 in user**. If you select this option, you also need to assign a role.

6. The **with role** field is only displayed 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. Select the **Include article info** checkbox if you want article information to be included into the export file (article ID, last update, etc).
9. When you check the **PDF** button extra fields are displayed for you to complete. These fields are specific to the PDF output.
10. **Orientation** allows you to set the page as portrait or landscape.
11. **Cover** allows you to set the front page of your PDF document.
12. **Header** allows you to set the header which appears on the top of each page of your PDF document.
13. **Footer** allows you to set the footer which appears at the bottom of each page of your PDF document.
14. If you choose **HTML (single file)** your document is produced as one big HTML file.
15. If you choose **HTML (multiple files)** each article gets its own HTML file.

16. Click **Save** to save the template without generating the document.
17. 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.

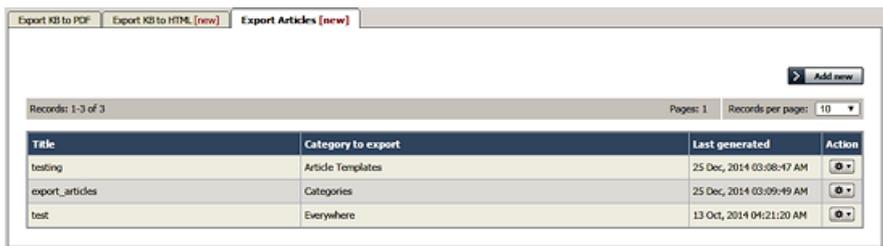
- Click **Save and Generate** to save your template setup. You can reuse this setup as often as you like to generate new documents for these settings. At the same time a first copy of the document is generated.
- This returns you to the Export screen with the new export template listed

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

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' tab is active. It displays a table with the following data:

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

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

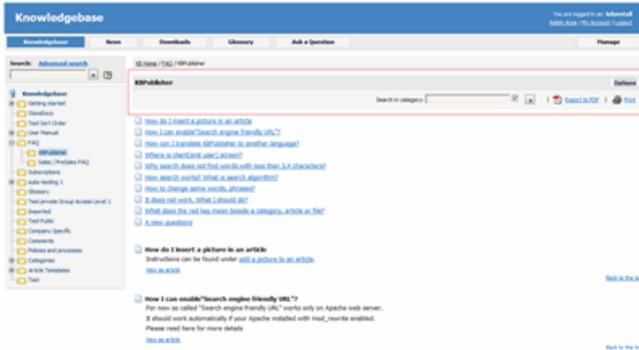
If you have purchased the export plugin, then you can set your knowledgebase up so that users can export a whole category of articles as a PDF document, or print it, from the **Public Area**.

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

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.

