

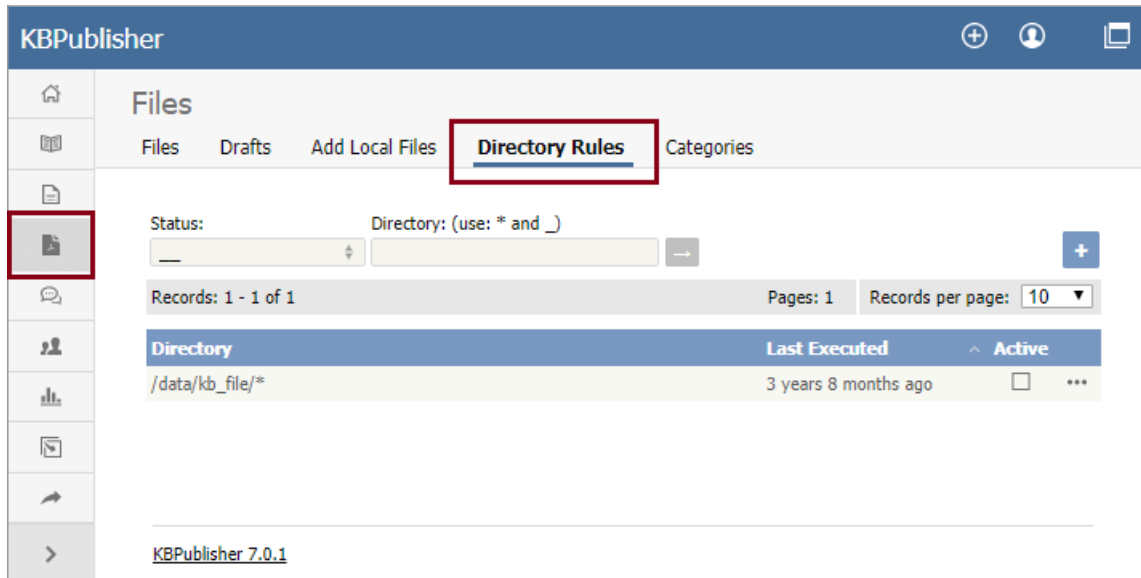
## Automatically Add Local Files

The **Directory Rules** screen allows you to set up the knowledgebase so that KBPublisher automatically checks the specified directory on the server or on Amazon S3 server every day and adds in KBPublisher links to any new files.

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

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

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



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

### Managing directory rules

Check the checkbox in the **Active** column for a rule to enable that directory rule. Uncheck the checkbox to disable the rule.

Click the [...] actions icon in the last column of a row to perform one of these actions on the directory rule in that row:

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

### Adding new directory rules

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

# Files

Files   Drafts   Add Local Files   **Directory Rules**   Categories

Specified directory will be parsed by scheduled task and found files will be added/updated\* to KB  
Denied or allowed extensions rule will be applied (see "Settings" tab). Files will not be copied or moved.

\* Adding a file this way means adding a record with the file path to the database.

**Rule options:**

\* Directory:  →

Parse child directories: ☒ Yes

Description:

Active: ☒ Yes

**File options:**

\* Category:   
  
+  
-  
←

\* Author:  +

Tags:  + ?

Private: ☐ Unlisted ☐ Read ☐ Write ?

Status:  ▼

Save
Cancel
Test

### Rule options:

- **Directory** — Choose source Directory or Amazon S3 (if enabled; see the "Allow access to Amazon S3" setting in [the Admin tab](#) to enable the Amazon S3 option).
  - For **Directory** enter the directory on the server. The directory name should be the [full server path](#).
  - For **Amazon S3** enter the S3 path in format: bucket\_name/prefix/... (prefix is optional).
  - Click **[→]** to verify that the path is correct. If the path is correct, in popup window, you will see a list of all files in that directory.
- **Parse child directories** — Check this option to have the rule monitor all sub-directories in the directory. This is selected by default.
- **Description** — A description is not required, but you can add one to describe the files that normally appear in the directory, or information about the directory rule that may be useful to other team members.
- **Active** — This field is selected by default, and once you save the new directory rule it will run at the next scheduled opportunity. Uncheck this check box to disable the rule. You can also enable and disable a directory rule from the full list of rules, as described above.

### File options:

- **Category** — Add one or more categories to which the links the new rules this directory rule finds will be added. Click the **[+]** icon to the right of the field to add a category.
- **Author** — By default, the current user's name appears in this field, and will be associated with the link to any file the directory rule adds to the knowledgebase. You can select a different user's name as the author, or opt to have no author name.
- **Tags** — Tags are search words. If you define a keyword here and a user then searches using that keyword, this file is displayed.
- **Private** — By default, the links the directory rule creates are public. Check one or both **Read** and **Write** check boxes to control read and write access to the linked file to users with the roles you specify. To make the file available only for users who has a link to the file, select the **Unlisted** check box. See [private read and write](#).
- **Status** — By default, files are set to a status of **published**, but you can change this to **not published**.

To test the settings click **Test**.

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

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