

Export Articles to PDF or HTML

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

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