Table of Contents

Settings

An explanation of the Settings module and how it works

The Admin Tab Explained

The **Admin** tab is the first tab under **Settings**. The fields on this tab control KBPublisher's configuration. Only administrators can change the settings on this tab.

You can reduce the number of fields displayed by typing key words into the **Filter** field, making it easier to find the fields you want. Restore the display by removing any entries from this field.

Click **Save** to save your edits; click **Set Defaults** to restore the original values for all fields.

International

- **Language** - Select the language for field labels and other onscreen texts for your KBPublisher.
- **Date format** - Select the format in which the date will be displayed in the system.

Date & Time

- **Time zone** - Select the time zone to use. If your team is distributed across many time zones, the time zone you select may not be the one for the area where you live, but rather the one where the majority of your team lives and works.

Security / Privacy

- **Multi-Factor Authentication** - Controls whether the user is allowed and/or required to use a multi-factor authentication method.
  Note that if you want the built-in MFA to be available for SAML authentication, first select *The same as MFA Policy setting* in **Authentication → SAML → Multi-Factor Authentication** .
- **Session expires (in minutes)** - Controls how long before the user is automatically logged out when they are not actively using the system. If you wish to turn automatic logout off, set this to 0.
- **Enable CAPTCHA to login** - Controls whether a user has to pass a CAPTCHA test, typing the test displayed in an image, in order to log in. The displayed image looks like this:

- **Allow automatic sign-in** - If enabled, users do not need to re-enter their username and password when returning to the site. Note: This option requires that the site be configured for SSL.
- **Allow concurrent logins** - Controls whether to allow multiple logins for a single user.
- **Allow login with email** - If checked, user can use his email as Username on login.
- **Use 'Email' for 'Username'** - If checked, email will be used as the Username.
- **Allow users to delete account** - Controls whether to allow users to delete their own account. User data will be moved to the trash but is recoverable. Content will not be deleted. If you select *Not allowed*, user will be able to send a delete request.

Password

- **Password strength** - Defines rules that passwords must meet, such as length and type of characters allowed and

disallowed.
- **Enable CAPTCHA to reset password** - Controls whether a user has to pass a CAPTCHA test, as described above, in order to reset the account password.
- **Password Rotation Frequency** - Defines how frequently password changes are required. Available options are: Off, 90 days, 180 days, and 1 year.
- **Password Rotation Policy** - Choose one of the following options:
  - *Advisable* - On login, notify the user that a password change is recommended.
  - *Mandatory* - Require a password change before the user can continue.
- **Password Rotation Previous Passwords** - Set if user is allowed to re-use previous passwords.
- **Password required to change password** - Select to require the user to provide their current password as well as the new password they want to change to.
- **Logout after password change** - Controls whether the user will be logged out after password change.

API

- **Enable API access** - Select to allow users access to the KBPublisher API.
- **Secure API connection** - Select to require a secure API connection (the URL starts with *https://* instead of *http://*).

Look & Feel (settings)

- **Number of records per page** - Set the number of records displayed per page when a user first goes to that page. The user can temporarily change the setting while on the page.
- **Sort articles by** - Specify the initial sort order for articles, which the user can change temporarily when working with a list of articles. The options are:
  - Title (sorted alphabetically)
  - Date added (newest first)
  - Date added (oldest first)
  - Date modified (newest first)
  - Date modified (oldest first)
- **Sort files by** - Specify the initial sort order for files, which the user can change temporarily when working with a list of files. The options are the same as for the previous field.
- **Form buttons position** - Choose where form buttons display on the page: always visible **below the form**, or **at the bottom of the page**.

HTML Editor

- **HTML editor file directory** - Required. Provide the location for images you use in articles or files that you link to. KBPublisher uses this location when you perform actions like insert a picture into an article.

Scheduled Tasks

- **Send critical messages to admin** - Select to send the administrator an email alert of critical errors in scheduled tasks so the administrator can respond quickly. Define the email address to receive these messages in the Email settings tab.
- **Allow HTTP requests** - Whether to allow HTTP requests to run scheduled tasks.
- **Allowed IP addresses for HTTP requests** - If you are using HTTP to run scheduled tasks, enter IP addresses to allow requests from. Enter IP addresses separated by ';' or a range of IP addresses separated with a '-'
  Example: 127.0.0.1; 210.234.12.15; 192.168.1.1-192.168.255.255

Tags

- **Allow to create tags** - Select to let users create custom tags when adding a record. If this is not selected, users can only choose from among the existing tags.

Article

- **Maximum number of revisions** - Specify how many past versions of a document are stored. If you set this to 5, then when the document is changed and saved the sixth time and after, the oldest revision is deleted so only the five most recent versions are retained. If you don't want to keep article history at all, set this to 0.
- **Autosave recovery information every** - Specify in minutes how often KBPublisher should automatically save an article a user is editing. To turn autosave off, set this to 0.
- **Default category** - If you select a category for this field, all new articles will by default be part of that category. Select *None* to disable this option.

Files

- **Files directory** - Required. Set the location where files are uploaded to, in this server path format.
- **Max file size** - Set the maximum file size, in kb, that users can upload (1024 kb = 1 mb). The maximum you can set depends on your php settings: see Handling file uploads.
- **Allowed extensions** - You can specify the file types that can be uploaded, separated by commas, such as "txt,png,doc,docx". Note: if you enter anything in this field, KBPublisher ignores any entry in the following field.
- **Denied extensions** - Specify types of files that cannot be uploaded, separated by commas, such as "php,exe,asp,cfm".

- **Maximum number of revisions** - Specify how many past versions of the file are stored. If you set this to 5, then when the file is changed and saved the sixth time and after, the oldest revision is deleted so only the five most recent versions are retained. If you don't want to keep file history at all, set this to 0.
- **Extract raw text** - Select to have KBPublisher try to extract the text from PDFs and similar files so it can include the content of the files when the user does a search.
- **XPDF installation path** - XPDF extracts content from PDF files to make that content searchable. If you have XPDF installed, provide the relative path to it in the form "/user/bin/". To disable this option, enter "off".
- **Catdoc installation path** - Catdoc extracts content from .doc files to make that content searchable. If you have Catdoc installed, provide the relative path to it in the form "/user/bin/". To disable this option, enter "off". Note: You can use either Catdoc or Antiword (below). You don't have to use both.
- **Antiword installation path** - Antiword extracts content from .doc files to make that content searchable. If you have Antiword installed, provide the relative path to it in the form "/user/bin/". To disable this option, enter "off".
- **Default category** - If you select a category for this field, all new files will by default be part of that category. Select *None* to disable this option.
- **Spy Directory missing files policy** - Select what the auto-load directory files functionality should do when it finds a file listed in the database that is no longer on the server.
- **Allowed directories for local files** - List allowed directories for adding local files. If empty, any directory is allowed.
- **Allow access to Amazon S3** - Specify Amazon S3 credentials to link S3 files to your KB.

Reports

- **Keep user activity records for** - Choose period during which user activity records will be stored in KB.

The **Public Area** tab is the second tab under the **Settings** menu. The settings here apply to the public view -- that is, to what users see.

Only an administrator can change the settings on this page. The page is divided into four further tabs:

- **Common**, for settings which are common to the whole knowledgebase
- **Articles**, for settings which are specific to articles
- **Files**, for settings which are specific to files.
- **Page Design** is to design pages in Public Area.

Common

Titles/Meta/Navigation

- **Site title (meta)** - set the meta title of the knowledgebase.
- **Site keywords (meta)** - set the meta keywords of the knowledgebase.
- **Site description (meta)** - set the meta description of the knowledgebase.
- **Header title** - the text displayed in the header.
- **Navigation title** - the home page in the navigation bar.
- **Display entry title in navigation** - show or hide the article title in the breadcrumb trail.
- **Extra items in navigation** - manage extra links in the breadcrumb trail
- **Site modules / Menu items** - manage main KB navigation and sections, sort menus, add extra items.
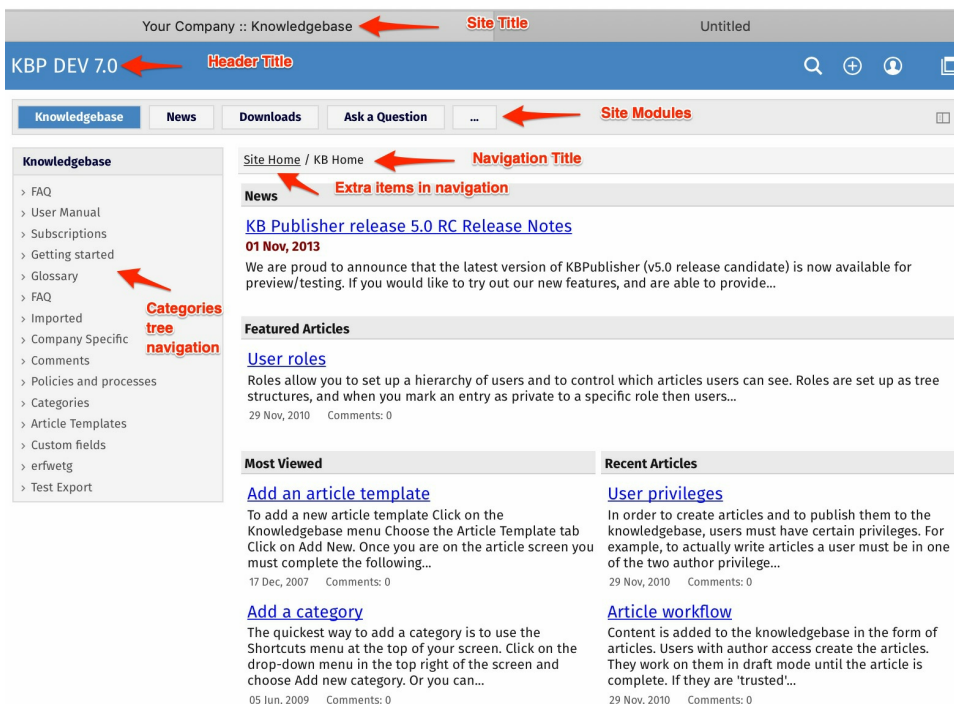
- **Search engine friendly URL** - controls what you type into the address line when you want to jump direct to an item in the knowledgebase.

Security/Privacy/Registering

- **Access for registered users only** - only people who are registered users can view the knowledgebase.
- **Allow registration** - whether registration allowed or not.
- **Agree terms** - if checked defined terms section will appear under registration form and users must agree to these terms to complete their registration.
- **Approval required for registration** - whether approval required for new registered users.
- **Privilege for new registered users** - this privilege will be set for all users registered through registration form.
- **Role for new registered users** - this role will be set for all users registered through registration form.
- **Enable CAPTCHA for registration** means the user has to type in a confirmation code before they can register. This is to stop scamming.
- **Login policy** determines whether a user gets a login option on the public view screen, whether they don't get the login option but can still login (if they know the link to the login page), or whether they cannot login at all.
- **Private policy** - controls whether content that is locked because it is private is displayed in the menu with a locked symbol, or whether it is simply not visible at all. When this is set to **Do not display entries** then the user only sees items he can access. When it is set to **Display entries with 'Locked' sign**, then the user can see the entries title but he cannot read them.

- **Cookie consent banner** - if set, a cookie consent banner will be displayed. The banner will be hidden when the user agrees to it.

CAPTCHA

- **CAPTHA type** - If enabled, users must pass a CAPTCHA challenge to prove that they are human. CAPTCHA technology protects your site from spam and abuse.

Look and Feel

- **Page template** - customize your KB to match your style. Click [...] to add custom header, footer, JavaScript and set colors for elements.
- **View format -** allows you to set your knowledgebase up with a left menu or without.
- **Left menu type -** can be a standard menu tree, or it can be a follow-on menu that allows users to click on one article after another to read them.
- **Header** - whether to display or not the header. If you uncheck, then the **Header title** (specified in section 1, above) and **Header logo** are not be displayed.
- **Header logo -** upload a logo to be added to the header section.
- **Content width** - controls page content width.

  Setting up the look and feel is covered in more detail in the article that explains how to [change the way articles are displayed](#).

Look & Feel (mobile)

- **Header logo for mobile version** - Choose a logo that will appear in "header" of the mobile version.

Feedback

- **Allow contact us** - set whether users can contact you using the Feedback facility through. You can set this so that all users can contact you, only registered users can contact you, or no users can.
- **Enable CAPTCHA** - controls whether a user has to pass a CAPTCHA test, typing the test displayed in an image, in order to add a feedback.
- **Enable quick response** - turns off the automatic searching and turns the form into a static feedback form. i.e. users type their message into the form and email it to the supervisor, but KBPublisher doesn't do the search.
- **Allow attachments** - says whether users can attach documents to their mail. The value here is the number of files that can be attached. When this is set to **0**, attachments cannot be included.
- **Allowed extensions** - controls the type of files that can be attached.
- **Send attachments with e-mail** - must be set if a user is allowed to send attachments in the Feedback form.

Sharing

- **Allow social sharing** - whether to allow visitors to share content on social networking sites.
- **Social networking sites** - click [...] to manage Social Sites.
- **Allow email sharing** - whether to allow visitors to share articles via email.

Tags

- **Display tags** - whether to display tags for articles, files, news, etc. If set tot **ON**, tags will be displayed below an article.

Search

- **By default search in** - defines whether the initial search searches the whole knowledgebase, only in articles, or only in files.
- **Search preview character limit** - how many characters display in search results.
- **Search by article ID** - defines search behavior when user types a number in the search field. You can disallow searching by article ID or allow it and choose between two options: search in content first or search by ID first. Defaults to "Search in content first then by ID"
- **Search suggest** - whether to offer suggestions when the user types in the search field. It suggests most popular searches based on other searches.
- **Search spelling suggest** - whether to suggest spelling when the user types in the search field.
- **Search filter** - controls whether to display the search filter in search results.
- **Default search filter** - controls whether to display filters if searching all the content.
- **Search filter items** - defines what filter items to display in the search filter.

Subscription

- **News subscription** - defines whether to allow users to subscribe to news.
- **News subscription frequency** - defines how often news emails will be sent.
- **News subscription time** - defines time of the day when emails will be sent. The list becomes active when you select *Daily* in the **News subscription frequency** field.
- **Content subscription** - definhttps://www.kbpublisher.com/kb/admin/index.php?

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module=knowledgebase&page=kb_draft&action=update&id=204es whether to allow users to subscribe to articles and files.

- **Content subscription frequency** - defines how often emails with new or updated articles and files will be sent.
- **Content subscription time** - defines time of day when emails will be sent.
- **Content subscription weekday** - defines a day of the week when emails will be sent.
- **Content subscription day** - defines day of the month when emails will be sent.

RSS settings

- Set RSS channel details.

Articles

Look and feel

- **Number of articles per page** - how many articles display per page.
- **Sort articles by** - how to sort articles.
- **Featured articles in a category** - how many featured articles display per category. If it is set to 0, featured articles are not shown.
- **Display "Also listed in"** - whether to show or not other categories this article is published in, displayed below article.
- **Others in this category** - controls whether or not the 'Others in this category' sub-heading is displayed at the bottom of the screen, and how many items are displayed if it is.
- **Display Prev / Next navigation** - controls whether the user sees links to the next article and previous article at the bottom of the screen.
- **Category columns** - defines how how many columns the categories are displayed in on the page in public view. If this is set to 0, no categories are displayed.
- **Article ID zero padding** - if you choose to include the article number in an article title prefix, you can also say how many digits the number will have by specifying number here. For example, if you had 100 questions and chose an article title prefix of '*Q*', by default they would be numbered *Q1...Q100*. If you would prefer it to be *Q001: .. Q100* set the entry ID padding to 3.
- **Article title prefix pattern** - you can add text to the front of an article heading using this setting. For example, if your article is named *Keeping Pets*, you can use the article title prefix pattern to make this: *Question: Keeping Pets*. Even better, if you use types in your knowledgebase, you can customize the article prefix to each type. Suppose, for example, you have two types of articles. One is *Facts*, the other is *General info.* If you wish you can change the title to include the type. e.g. *Fact: Climate change is happening* and *General info: What are greenhouse gases?*.
  You can include the article number as part of the article title prefix as well. e.g. *Q: What can I do to help?*
- **Display Article ID** - whether to display article ID and date updated below article title.

Table of contents

- **Generate TOC** - Whether or not to generate a table of contents (TOC). If checked, TOC will be generated at the top of an article.
- **TOC tags** - The list of heading tags to use to generate the table of contents. Example: h1,h2
- **Minimum article characters** - Specify number of article characters. If the number of characters in an article is less than this limit, a TOC will not be generated.
- **Minimum tags** - Specify number of tags. If the number of headings is less than this limit, a TOC will not be generated.

Comments

- This section allows to set up article comments settings. How many comments per page, if approval required, etc.

Rating

- **Allow rate articles** - lets the user rate articles in your knowledgebase.
- **Rating type** - Ratings can be text, helpful/not helpful, or you can use a star system where the user rates the article out of five stars.

Feedback

- **Allow feedbacks** - Enable this option to allow visitors to send article feedback such as rating comments, reporting article issues, etc.

Sharing

- **Allow social sharing** - Enable this option to allow visitors to share content on social networking sites.
- **Social networking sites** - Choose social media that will be available to users.
- **Allow email sharing** - Enable this option to allow visitors to share articles via email.

Article preview format

- **Article Character Limit** - number of characters displayed in the preview.

- **Display updated date** - whether the last date the article was updated is shown.
- You can also specify whether to display the **rating**, **number of comments** and **number of views**.

Article information block

- **Block Position** - where to display information block.
- **Display article block** - displays the article ID and when the article was last updated.
- **Display private block -** shows whether the article is public or private. If an article is private, a user can hover his/her mouse over the key graphic to see which roles have access.
- **Display author block -** displays the date an article was created and the name of the author. If the article has been updated since, it also displays the name of the person who last updated it and when that was. The format of the author/updater's name is controlled by the **user format for author block**.
- You can also choose to include whether or not to display the number times this article has been **viewed** and **commented**.
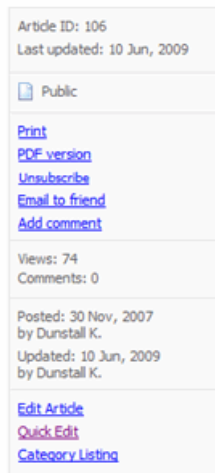
Article actions block

- **Block Position** - where to display actions block.
- **Float Panel** - manage article actions items.
- You also can define whether to display each of the following actions:
  - **Print**
  - **Export to PDF**
  - **Save** (saves an article to user's favorite list)
  - **Pin**

Files

Look & Feel

- **Number of entries per page** - how many files display per page.
- **Sort files by** - how to sort files.
- **Category columns** - defines how how many columns the categories are displayed in on the page in public view. If this is set to **0**, no categories are displayed.

File preview format

- **Display number of downloads** - controls whether users see how many times the file has been downloaded.

Page Design

- This section controls page layouts. It is available for Index and Downloads pages. You can manage block position, add custom blocks, and create different grids.

Setting Up Email Notifications in Your Knowledge Base

The **Email** tab under the **Settings** controls who receives administration emails, and how the email is set up.

1. The **Support Email** sections allows you to define system emails.

- **Support mailer** is the special email header
- **Support Email** is the email address, or addresses, where the administration emails are sent. Feedback emails are sent to this address. You can enter more than one email address. Separate each email address with a comma.
- **Support Name** is the name the user sees when they receive an email from KBPublisher. For example, if you reply to a feedback question, this is the name that will be shown in the reply field
- The **No Reply Email** is the email address that sends automated information such as subscription alerts, password enquiries and so on
- The person or persons assigned in the **Admin Email** receive system notifications, warning messages and other messages that impact the running of your knowledgebase.

2. The **Email settings** are where you set up the mail system.

- The **mailer** is the system you are using to send the emails.
    - This defaults to the **PHP mail function** unless you change it.
    - The other items here are specific to the **SMTP** mailer, and should only be filled in if you have specified **SMTP** as the mailer.
    - **Sendmail** defines the location of sendmail files. Sendmail is a UNIX based mail application. You would not normally change this.

3. The **Mass mailer** controls how many emails, such as subscriptions, are sent by the background task scheduling system.

- **Email limit per hour** controls how many emails are sent per hour.

Under **Settings > Plugins**, the **Export** tab allows you to enable and configure the Export plugin, which is available as an add-on to enhance KBPublisher functionality. To use the Export plugin, you need to purchase a **plugin key**, which is sold separately. For KBPublisher Cloud users, select a plan that includes the Export plugin.

Export Plugin

- **Plugin key** - Enter your plugin key here. To see how the system works, type 'demo'. Note that demo documents have a 'trial' watermark on each page and are limited in quantity.
- **Allow category exporting** - If allowed, users can export whole categories to PDF. Available options are: Not allowed, Allowed for all, Allowed for registered users only, and Allowed for staff only.
- **Print article block in PDF** - Select this option to include the block of article information in the exported PDF. It works when you export single article in Public Area.
- **Font** - Select the default font for document text. Available options are: Arial, Courier, Helvetica, Monospace, Sans Mono, Sans, Serif, and Times.
- **Font size** - Enter the default font size, in points.

WKHTMLTOPDF

WKHTMLTOPDF is preferred over HTMLDOC. Third-party tools, such as WKHTMLTOPDF, are already installed and available for KBPublisher Cloud users.

- **WKHTMLTOPDF installation path** - To produce PDFs, you need to install a program called WKHTMLTOPDF. Turn this feature off by entering 'off', or specify a path where this program is installed. For example: /usr/bin/
- **Cover template** - Click the ellipsis to view, edit, enable, or disable the cover page template. When enabled, the cover template adds cover page to the resulting PDF when you export a category.
- **Header template** - Click the ellipsis to view, edit, enable, or disable the header template. When enabled, the header template adds a header to all PDF-generated pages.
- **Footer template** - Click the ellipsis to view, edit, enable, or disable the footer template. When enabled, the footer template adds a footer to all PDF-generated pages.

  The checkboxes indicates whether or not each template is enabled. Please note these template options only work if you use WKHTMLTOPDF.

HTMLDOC

- **HTMLDOC installation path** - To produce PDFs and HTML pages, you need to install a program called HTMLDOC. Turn this feature off by entering 'off', or specify a path where this program is installed. For example: /usr/bin/

The License tab explained

The license tab provides details of your KBPublisher customer number, the type of license you purchased and when you purchased it.

When you purchase from KBPublisher your license key and software downloads are made available under the My Licenses tab in the [Client Area](#) on the KBPublisher site. After you install KBPublisher, copy the license key provided in the Client Area here.

Sphinx is a full-text search engine that provides fast and relevant full-text search functionality.
Key Sphinx features are:

- high indexing and searching performance;
- advanced indexing and querying tools (flexible and feature-rich text tokenizer, querying language, several different ranking modes, etc.);
- proven scalability up to billions of documents, terabytes of data, and thousands of queries per second.

Steps to enable Sphinx Search

- [Download](#) and [install](#) Sphinx on your machine, **supported version is** **Sphinx 2.2.11 - 2.3.2, 3.1 - 3.3**
- Go to KBPublisher Admin Area
- Click Settings -> Plugins -> Sphinx Search tab
- Check **Enable Sphinx Search** checkbox
- Click **Save**

Sphinx Settings

- **Enable Sphinx Search** - On, or Off Sphinx (if Sphinx is Off - search is performed by MySQL full text)
- **Test Mode** - if you wish to test Sphinx, you can firstly set it in a test mode. Sphinx search will be activated only by putting 'sphinx:' in front of your query, e.g. sphinx:banana
- **Host** - Sphinx daemon host (default is 127.0.0.1)
- **Port** - Sphinx daemon port (any free port, default is 9306)
- **Bin path** - a directory where Sphinx is installed. You can leave it empty, but if your system does not recognize Sphinx command without path than - you should fill it, e.g. /usr/local/bin/
- **Data path** - a directory where all Sphinx related files will be stored. Defaults to KBP cache directory, but you can change it. It should be writable by Scheduled Task (cron) user.
- **Version** - a version number of Sphinx which you use on the computer.
- **Languages** - set it to your language, if you have documents in another languages, select the available from the drop down list.

Essential facts for Sphinx Search

- All Sphinx tasks are executed by frequently scheduled task (cron)
- Search index is updated every 5 minutes

Sphinx Search Logs

- You can monitor how Sphinx works, what tasks are executed, what is indexed, what is added to index, etc. in Logs -> Sphinx tab

What is a search engine friendly URL?

KBPublisher records are stored in a database. When you wish to read an article, KBPublisher sends a request to the database to get this record for you. This request is usually sent as a query string, and in its native form it looks something like:

> http://*yoursitename.com*/kb/index.php?view=entry&entryID=90.

This works well to get the record back, but most search engines, Google excepted, will not index pages with question marks (?) or ampersands (&) in the name.

To get around this, we use a **search engine friendly URL**. This converts the query to something more like:

1. *http://yoursitename.com/kb/entry/90*
2. *http://yoursitename.com/kb/Search-engine-friendly-URLs_90.html*

which contains only characters that search engines recognize, and therefore will the record will be found by the search engine.

Not only that, when sending a link to someone else, it makes a lot more sense, and is a lot less error prone, to send a link *http://yoursitename.com/kb/entry/90* than to send *http://yoursitename/kb/index.php?view=entry&entryID=90*.

How do I set up a search engine friendly URL?

- Log onto KBPublisher as an administrator
- Choose the **Settings** menu
- Click on the **Public Area -> Common** tab
- Go to the **Titles / Meta** section and choose an appropriate option from the **Search Engine Friendly URL** drop down list.

  You have four options:

- - Automatic uses the default set up when KBPublisher was installed
  - Type 1: kb/entry/[article_id] gives the friendly URL - ***http://yoursitename.com/kb/entry/90***
  - Type 2: kb/entry/[article_title]_[article_id].html gives the friendly URL - ***http://yoursitename.com/kb/Search-engine-friendly-URLs_90.html***
  - Do not use search engine friendly URL means exactly what it says.
    Your link to the article mentioned above would be ***http://yoursitename.com/kb/index.php?view=entry&entryID=90***

Note:

- **"Search Engine Friendly URL"** works on Apache web server with *mod_rewrite* enabled.
- On IIS you can set it up with [IIS ModRewrite](#) or similar tools.
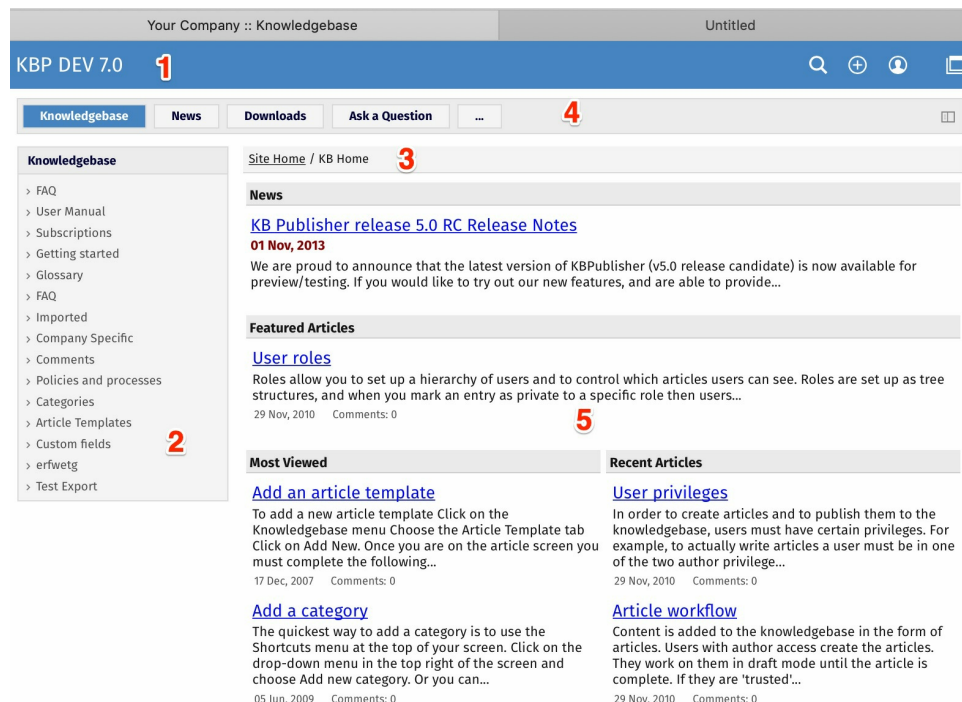
Look and feel

Change the design

Customizing Public Area

KBPublisher can be extensively customized and you can get some spectacular results if you want to design your own site.

The default format of the KBPublisher **Public Area** is:

1. The standard header is controlled by the **Header** field.
   Settings -> Public Area -> Common -> Header

   You can:

   - Include the header by checking the **Header** field
   - Remove the **Header** by un-checking this field

   If no header is assigned, a header is controlled by the **Header title** field.
   Settings -> Public Area -> Common -> Header title

2. Likewise, the left menu is standard. The menu is controlled by the **View Format** field which is under **Look & Feel**.
   Settings -> Public Area -> Common -> View Format

   The menu choices are either **Browseable, Left Menu** or **Intranet**.

3. Directly under the header are menu options and a breadcrumb trail.

   The menu options, which are extra links that can be included in the menu, are displayed first. For example, you might want to include a "Home" link if the knowledgebase is part of a larger site.

   The menus are controlled by the **Extra links in navigation** field.
   Settings -> Public Area -> Common -> Extra items in navigation

   To include extra links, click the [...] button and you can manage extra links.
   The breadcrumb trail is displayed after any extra links. It reflects the article you are currently viewing in the knowledgebase.

4. Site modules/Menu items.

   The menu options are extra links in navigation menu.

   The menus are controlled by the **Site modules/Menu items** field.
   Settings -> Public Area -> Common -> Site modules/Menu items

   To manage menu items, click [...].

5. This area will change depending on "Page Design" settings.
   Settings -> Public Area -> Page Design.

   In the "Page Design" section you can manage built-in blocks, add custom blocks, and organize blocks on the grid.

Customising page layouts

Page Design settings allows you to customize page layouts for home and download pages. You can move blocks, resize blocks, and add custom blocks to create your preferred layout.

To set up your own page layouts go to **Settings -> Public Area -> Page Design** tab and click the page you want to update.

Updating Page Layout

- To move a block, drag from the middle of the block.
- To resize a block, drag from the border of the block.
- To add a new block to the existing layout, click [+] on the right. In the popup, click on the block and it will be added to the layout.
- To remove a block from the layout, click ✖ on the right in the block.
- To cancel your changes, click **Reset**.
- To reset the layout to its default state, click **Set Defaults**.
- Page Header and Menu blocks cannot be moved, resized, or removed from the page layout.

Update Block

- To update a block's properties, click ⬚ on the right in the block. Depending on the block, properties can include the title, number of items, or custom content.

Custom Blocks

- Custom blocks allow you to include any content. For example, you could include ads or announcements.
- To add a custom block:
  - Click [+] on the right.
  - Click **Add a custom block**.
  - Add content, and then click **Save**.
  - Click on the block and it will be added to the layout.
- *Title* is optional for custom blocks.

Customizing article display options

You can customize how and where articles are displayed in the **Settings > Public Area > Articles** tab.

Look & Feel

In this area you can specify

- **Number of articles per page** - Set how many articles appear per page. If there are more articles than the number you set, KBPublisher provides navigation so the reader can move from page to page of the display.
- **Sort articles by** - Choose an option for the default order by which articles are sorted.
- **Featured articles in a category** - Set how many "featured articles" appear for each category. Set the field to 0 to remove this feature.
- **Display 'Also listed in'** - Set to **yes** to show a list of other categories in which the article is listed. Set to **no** to disable this feature.
- **Others in this category** - Set how many links to other articles in this article's category to display when the user is reading the article. Set to "None" to disable the feature.
- **Display Prev / Next navigation** - Set whether and in what conditions you want to display previous / next navigation for articles in this article's category.
- **Category columns** - Set how many columns to use to display the articles in a category.
- **Article ID zero padding** - If you use an article title prefix (see the next field) you can set here the number of zeros with which to pad a short ID. If you set the padding number to 3, for example, and you have and article with ID 1000 ID 1 will show up as 0001 to provide a display that is easier to read.
- **Article title prefix pattern** - You can opt to prefix each article title with a pattern that can include the article's ID. For example, presume your article with ID 1 has the title "Welcome to our knowledgebase":
  - 'Q{$entry_id}:' would cause the article to appear in the list as "Q1: Welcome to our knowledgebase".
  - 'Q{$entry_id}:' | Q{$entry_id} - {$entry_type}: ' would behave as above if the article does not have an entry type. If its entry type were "intro", for example, it would appear in the list as "Q1 - intro: Welcome to our knowledgebase".
- **Display Article ID** - Whether to display Article ID, last updated date at the top of an article.

Comments

In this section you can control whether and how comments display.

- **Allow add comments** - Select whether to prevent comments, to let only registered users add comments, or let all readers add comments. If you prevent comments in this field, the rest of the fields in this section are ignored.
- **Enable visual confirmation** - Specify whether to use a CAPTCHA confirmation to prevent robotic spam comments. You can require no CAPTCHA confirmation, confirmation for non-registered users, or confirmation for all users adding comments.
- **Comment approval policy** - Specify whether comments must be approved before they are added to the knowledgebase. YOu can accept all comments without approval, require approval only for non-registered users' comments, or require approval of all comments.
- **Comment subscription** - Specify whether registered users can request a notice to be sent when a comment is added to a particular article.
- **Number of comments per page** - Select the number of comments to appear per page. If the number of comments is larger than the number you specify here, navigation allows readers to move through the pages of comments.
- **Display comments on the article page** - Check this check box to have comments appear on the same page as the article. If this option is not selected, a link appears to a separate comments page.
- **Signature format for commenter** - Specify how the commenter's signature appears at the end of the comment. Options include [first_name], [last_name], [middle_name], [short_first_name], [short_last_name], [short_middle_name], [username], [email], [phone], [user_id]. You can use multiple tags to construct a signature, such as "[first_name] - ID [user_id]".

Rating

You can let users rate articles in your knowledgebase with these settings:

- **Allow rate articles** - Check this check box to let users rate articles.
- **Rating type** - Set the type of rating display as **stars** or **text**.

Feedback

- **Allow feedbacks** - Check this check box to let visitors to send feedback, rating comments, report an article issues, etc..

Sharing

- **Allow social sharing** - Enable this option to allow visitors to share content on social networking sites.
- **Social networking sites** - This options allows to manage list of social networking sites.
- **Allow email sharing** - Check this check box to let visitors sharing article via email.

Article preview format

In this section set preview options for an article. This is what the user sees before clicking to view the article itself.

- **Article character limit** - Set how many text characters, starting from the start of the first sentence in the article, display in the preview. Set this to 0 to display no extract from the article.
- **Display updated date** - Select this option to display when the article was most recently updated.
- **Display rating** - Select this option to display the article's rating.
- **Display number of comments** - Select this option to display the number of comments this article has.
- **Display number of views** - Select this option to display the number of views this article has had.

Article information block

In this section set the information that appears when the user opens the article.

- **Block position** - Set whether the article information block, with information such as the article's ID and when it was last updated, appears to the right or at the bottom of the article.
- **Display Article block** - Select this option to display the article information block.
- **Display Private block** - Select this option to display private, role-protected information.
- **Display author block** - Select this option to display author information. Complete the following field to format the information.
- **Use format for author block** - Format author information. For example, to display the author's informal first name and last name, set this field to "[short_first_name] [last_name]". Tags available include: [first_name], [last_name], [middle_name], [short_first_name], [short_last_name], [short_middle_name], [username], [email], [phone], [id], [company].
- **Display number of views** - Select this option to display the number of views the article has had.
- **Display number of comments** - Select this option to display the number of comments the article has.

Article actions block

- **Block position** - Set whether the actions block appears.
- **Float Panel** - This options allows to manage list of items in Float Panel.
- **Display "Print" link** - Select this option to display an icon the user can click to print the article.
- **Display "Export to PDF" link** - Select this option to display an icon the user can click to export the article as a PDF file.
- **Display "Save" link** - This option allows to save article to a list for future reference.
- **Display "Pin" link** - This option allows to print, export to PDF, etc. many articles at once.

Saving your settings

Click **Save** to save your settings. Click **Set Defaults** to remove any custom settings and restore system defaults.

Change KBPublisher Look and Feel (design integration)

You can brand the knowledgebase so that it matches the rest of your website. For example, you can include your company logo and standard buttons on each knowledgebase page.

To set up custom template:

- Log on to the knowledgebase
- Go the **Admin Area**
- Click on the **Settings** menu and choose the **Public Area -> Common** tab
- Click [...] button in the **Page Template** field which will open new window with page settings
- Add a template to **Header** and **Footer** section respectively
- Add custom css styles, javascript to **HEAD element section**
- Click **Save** to save the changes
- Go to **Public Area** to see/test your custome template settings

Notes:

- You must be an administrator to do this

This functionality works in version 5.0 and above

[v4.5 and below] Change KBPublisher Look and Feel

The template page

If you want to brand the knowledgebase so that it matches the rest of your website. For example, you can include your company logo and standard buttons on each knowledgebase page.

To create and use custom template:

- Create an HTML page based on this example. Remember that you can add as much as you like around the various html tags, but you must include everything in the example file.
- Upload the newly created page onto your server
- Log on to the knowledgebase
- Go the **Admin** area
- Click on the **Settings** menu and choose the **Public Area -> Common** tab
- In the **Look & feel (format/template/style)** section, change the **Template Page To Load** to the full server path to the template
  (e.g. /usr/www/html/ ..../your_template.html).

Notes:

- You must be an administrator to do this
- If you prefer, you can set the **Template Page to load** field to the URL, i.e. http://www.your_domain.com/your_template.html, rather than to the full server path, i.e. /usr/www/html/ ..../your_template.html, if your PHP installation allows it. (On some PHP installations this option is not allowed).
- Using the URL for the template path (http://www.your_domain.com/your_template.html) cause extra lookups, which will may affect the performance a litte, hence we recommend that you use the server path name if you can.
- If you need to execute php in your template, use the full URL for the template path.

Changing associated CSS

When you modify KBPublisher to fit your site design, you will probably also need to change some css styles as well.

All cascading style sheets used in KB Publisher are in the kbp_directory/client/skin/ directory, where kbp_directory is the name the directory under which you installed KBPublisher. Most styles for the public area are defined in kbp_directory/client/skin/common.css.

You are welcome to change these or to add your own. We do recommend, however, that you create a new style sheet and include a link to the new style sheet in your custom template to overwrite existing KBPublisher styles, rather than change common.css.

User settings

Default user settings

User defaults

The knowledgebase administrator sets user defaults when they create the knowledgebase, and can update them at any time.

Security

User setup is part of the security section in the Settings menu:

- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security/Privacy/Registering** section

Here you can:

- Force users to register before they access the knowledgebase
- Determine whether the registration must be approved by a moderator
- Determine whether users must complete a visual confirmation code before their registration is accepted
- Set the default privilege and role new registered users are created with
- Show or hide articles users do not have access to
- Set how long before KBPublisher logs an inactive user out.

Set default user privileges

New users can be created two ways. They can be set up by the knowledgebase administrator, or users can register themselves.

By default, when users register KBPublisher creates them with no privileges. You can change this so that new users are created with a specific default privilege by:

- From the **Settings** menu choose the **Public Area** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Privilege for new registered users** from the drop-down list of privileges
- Click **Save**.

All new users who register after this are created with the new default privilege.

You must have administrator access to change the settings.

Configuring Default Roles for Knowledge Capture & Management

New users can be created two ways. They can be set up by the knowledgebase administrator, or users can register themselves.

By default, KBPublisher creates registered users with no designated role. You can change this so that new users are created with a specific role by:

- First, ensure that the role exists. If it doesn't, create it first
- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Role for new registered users** from the drop-down list of roles
- Click **Save**.

All users who register after this are created with the new default role.
You must have administrator access to change the settings.

Force users to log on

To force users to log on to even see the knowledgebase, let alone read articles:

- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security/Privacy/Registering** section
- Check **access for registered users only**.

To force users to log on before they can read specific sections of the knowledgebase:

- From the **Articles** menu choose the **Categories** tab
- Check each category you wish to force users to log on for
- Choose **set private** from **actions with selected** at the bottom of the list of categories
- This brings up privacy options for you to select from. Check **Read** but do not select any roles from the list

To force users to log on before they can read specific articles in the knowledgebase:

- From the **Articles** menu choose the **Articles** tab
- Check each article you wish to force users to log on for
- Choose **set private** from the **actions with selected** at the bottom of the list of articles
- Check **read** but do not select any roles from the list

You can also set **private read** while you are creating or editing the category or article.

What is the difference between forcing a user to register and forcing them to log on?

When you force a user to register (access for registered users only) they must log on to the knowledgebase before they can read articles, whether the articles are marked as private or not.

When a user is not forced to register, they can always access the knowledgebase home page, even if they are not registered. They can read articles that are not marked as private, even if they do not log on. If an article is marked as private, however, then the user must register and log on in order to read that specific article.

Allow Users to Register

To set up your knowledgebase so that users register themselves:

- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security/Privacy/Registering** section
- Check **Allow registration**
- Click **Save** to save the changes.

When a user comes to the site, they will see a **Register** option in the top-right-hand corner of the screen (near **login**). They can click on **Register** and will be presented with a screen of user details to fill in. What happens once they fill in the details on that screen depends on other settings in the Security/Privacy/Registering section.

- If you have specified that the user must provide **visual confirmation** before they can register, the user will also get a code to type in as part of the registration process
- If you checked **approval required for registration** then the registration request is sent to the administrator, who must approve it before the user can log in. If you did not check this option, the user can log in immediately (or at least, as soon as they get the automated confirmation message)
- If you specified a default **privilege** for new users, the user will be set up with that privilege
- If you specified a default **role** for new users, the user will be set up with that role.

Allow users to rate articles

You can set up KBPublisher so that users can rate articles.

- From the **Settings** menu choose the **Public Area -> Common** tab
- Check A**llow rate articles**
- If you want the user to add a comment when they give a rating, check **Allow feedbacks**
- Click **Save**.

Allow users to leave comments in a feature-rich internal knowledge base

You can set up KBPublisher so that user comments appear immediately, or so that they must be approved first, or you can turn comment functionality off altogether. You may also identify whether or not only registered users can add comments.

- From the **Settings** menu choose the **Public Area -> Articles** tab
- Go to the **Comments** section
- Specify who can add comments via **allow add comments**
- Specify whether the comments must approved before they appear via the **comment approval policy**
- Specify whether a user must type in a visual confirmation code before they can send the comment via **enable visual confirmation to add comment**
- Click **Save**.

You must have administrator access to change the settings.

Email settings

Setting up emails and communication

Preformatted letters

The **Letter Template** tab is available from the **Settings -> Email** menu. It controls the format of emails that are sent and received by the knowledgebase.

Letters with green arrows are mails that are received by the knowledgebase administrator. Examples of these include 'ask a question' emails or user registrations. Letters with red arrows are mails that are sent to users. Examples of these include registration confirmation and password reminders.

KBPublisher provides a set number of templates. You cannot add new ones. You can, however, edit existing templates.

Editing letter templates

When you edit a letter template you are presented with an email form that you can modify to suit your own requirements.

You can include any text you wish.

You can include template fields anywhere in the email or in the header:

The actual fields you can include depend on the letter, but some common ones are:

- *[support_name]* -- this is the name defined in the **Support Name** field on the **Email** tab
- *[support_email]* -- this is the email defined in the **Support Email** field on the **Email** tab
- *[support_mailer]* -- this is the name defined in the **Support Mailer** field on the **Email** tab
- *[noreply_email]* -- the standard "Do not reply to this email" from address
- *[name]* -- the name of the user to whom the mail is being sent or who it is from
- *[username]* -- that person's user name
- *[first_name]* -- their first name
- *[last_name]* -- their surname
- *[middle_name]* -- their middle name
- *[email]* -- their email address
- *[link]* -- a link to the page that this email is about.

The field name must be enclosed by square brackets.

Some email templates also have a field called **to Category Supervisor**. This field is shown when the letter relates to a specific article. If you check **to Category Supervisor**, and the category has a assigned supervisor, then the letter is emailed to the supervisor rather than to the Support Mailer address.

Setting Email Recipients for Knowledge Management

System emails

You can designate a user, or users, to receive system emails.

- From the **Settings** menu choose the **Email -> Letter Template** tab.
- Type the email of the person who is to receive user communications into the **From E-mail / Support E-mail** field. You can input more than one email. Separate each email address with a comma. Everyone specified here will receive system emails.
- Type an appropriate name into the **From Name / Support Name field** . This is the name the user sees in their 'from' field when they receive an email from KBPublisher.
- Add an email address for system-generated messages to users in the **No reply email** field.
- Add the name of the person who will receive notification of all system errors, notifications and warnings to the **Admin Email** field. This field also accepts multiple email addresses. If you use multiple emails, separate each one with a comma.
- Click **Save**.

Category emails

You can also specify a user to receive notifications about articles/files/comments in specific categories. This is used when articles or comments need to be approved.
The 5 letters that can be sent to a category supervisor are:

- Approve article (to approver)
- Approve file (to approver)
- Approve comment (to approver)
- New rating comment
- Scheduled entry

First, you need to assign a person to receive the emails:

- From the **Articles** or **Files** menu choose the **Categories** tab
- **Edit** the category
- Click on the add new **Supervisor** icon
- **Assign** a user from the list of users
- **OK** to save the assignment.

After this, you need to tell the system that the supervisor should receive the emails.

- From the **Settings** menu choose the **Letter Template** tab.
- **Edit** the letter that is to go to the supervisor
- Check **to Category Supervisor**
- **OK** to save.

Feedback supervisor emails

You can also determine who receives the emails when the user requests feedback through the **Ask a Question** tab.

This is controlled by the feedback subjects list.

- From the **Tools** menu choose the **Lists** tab
- Click on **Feedback Subjects**
- **Edit** the subject for which you wish to change the email to be sent
- Click on the add new **Supervisor** icon
- Click on **Assign** for the person you wish to receive emails. You may assign more than one person. Click assign for each.
- Close the assign user pop-up by clicking on the 'X' in the top right corner.

Change text in emails

To change the text in emails sent from, or returned to, KBPublisher:

- From the **Settings** menu choose the **Email -> Letter Template** tab
- Choose the email you wish to change
- Click on the edit icon in the **Action** column
- Make the change you require. See E-mail Letter templates for an explanation of fields.
- Click **Save** to save your changes.