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# Files

The Files area of the knowledgebase

## Understanding Files in Your Knowledge Management System

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Files are documents you can add to your knowledgebase. The type of files you can add is controlled by the settings of your knowledgebase, but in general you can add graphics, text documents, Microsoft Office documents (Word, Excel, PowerPoint) or PDFs.

The file area is separate to the article knowledgebase, although you can attach the files from the File area into articles. Note though, that [inserting graphics into articles](#) is not the same as adding a file from the Files area.

Why would you want to have a separate files area? Common examples might be:

- It could be a download area of your knowledgebase.
- You have a whole lot of process documents or user manuals that you wish to upload.

The maximum size of a file you can upload depends on PHP settings, default is 2MB.

## Add a File

To add a file from your local computer to the server, select **Files** from the menu bar to display a series of sub-tabs. To link to a file that is already on your server, see [Add a local file](#).

- To upload a new file that requires no further approvals before becoming available, select the **Files** tab. Then click the **Add new** button to display the form where you specify the file.

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

**Add new:** Max file size: 16 mb | Max post size (all files): 8 mb

\* File:  No file chosen

\* Category:

Title:

Description:

Tags:

Private: ☐ Unlisted ☐ Read ☐ Write

Schedule: ☐ Yes

Order:

Status:

Complete the form's fields:

- **File** — Select the file to upload.
- **Category** — Add one or more categories for the files by clicking the **+** icon to the right of the **Category** field and selecting from the list of categories provided.
- **Title** — Add a title.
- **Description** — Add a description.
- **Tags** — You can add one or more tags to help users find the file. Click the Tags link and then select tags:
  - Type a few characters of the tag you want in the field that appears, and select the tag from the options provided.
  - Click the "Choose from your tags" link to display all the tags available. Select the ones you want to associate with this file.
- **Private** — You can opt to restrict either or both **read** and **write** access to the files. If you check either check box another field appears where you can specify which roles users must have to be able to read and/or update the file. You can also make the file **unlisted** and users can access it only if they have a link to the file.
- **Schedule** — Check the **Yes** check box and use the fields that appear to set a date when the status of the current files changes from unpublished to published. Check the **And** check box to set a date after which the status of the current files changes from published to unpublished.
- **Order** — The categories you have selected for the file are listed in the **Order** field, along with a drop-down list of where to place the article within the category. There is one order list for each category you have chosen.
- **Status** — You can set the file status as **Published** or **Unpublished**.

Click **Save** to upload the file.

Click **Cancel** to abandon your edits and close the form.

If the **Published** status is selected, the **Publish** button appears instead of **Save**. After clicking the **Publish** button, the file becomes visible in the Public area.

The maximum size of a file you can upload depends on PHP settings. The default is 2MB.

See [here](#) for Files settings (Allowed extension, Max file size, etc).

## Bulk update files

KBPublisher allows you to bulk update files to:

- Move to a category
- Add to a category
- Set tags
- Make the files public or private
- Schedule file publication
- Re-parse files to extract text from the file (to make them searchable) and update the file size information
- Set custom fields
- Set file status
- Delete files.

You can do this direct from the **Files** menu, **Files** tab.

The screenshot shows the KBPublisher interface with the 'Files' tab selected. At the top, there are filters for Category, Status, and Search. Below these, it shows 'Records: 1 - 10 of 64', 'Pages: 1 of 7', and 'Records per page: 10'. A table of files is displayed with columns: ID, Posted, Updated, Filename, Category, Filesize, File text, Downl, Status, and Actions. The table contains 5 rows of data. A dropdown menu is open over the 'Actions' column, showing options: 'Actions with selected', 'Move to Category', 'Add to Category', 'Set Tags', 'Set Private', 'Set Public (remove private)', 'Schedule' (highlighted), 'Re-parse files (filesize, text, etc.)', 'Set Custom Fields', 'Set Status', and 'Delete'.

ID	Posted	Updated	Filename	Category	Filesize	File text	Downl	Status	Actions
542	14 Apr, 2019		En_Ru.png	123	15 kb	.	0		...
536	17 Mar, 2019		Rating.png	New category2	42 kb	.	0		...
531	09 Feb, 2019	09 Feb, 2019	ShortName.png	Attachments	48 kb	.	1		...
527	09 Feb, 2019	09 Feb, 2019	Update.png	Attachments	39 kb	.	1		...
...	...	...	Снимок 1.png	Attachments	376 kb	.	8		...

To update the file:

- Check one or more files to update
- Choose the appropriate action from the drop down list of **actions with selected**
- This brings up further options to select from according to the action chosen. Choose the appropriate selection
- Click **OK**.

Note:

- Bulk actions available depend on your user access.  
For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

## Add a Local File

When you want to add files to the knowledgebase, you can upload files from your local computer, or you can link to files that are already on your server or files located on Amazon S3 server. In KBPublisher such files are known as "local files". If the file already exists on the server it saves space to reference it rather than uploading a second copy specifically for the knowledgebase.

By adding a reference to a file that may be also be available through your corporate website or some other site (forms, disclaimers, fair-use and privacy policies, product disclosure statements, catalogues, printable manuals, and so on) you can make the knowledgebase richer and more useful without taking up additional space.

To add a local file (a reference to a file already on your server):

- Select the **Files** menu.
- Choose the **Add Local Files** tab to display the **Local add** form:

The screenshot shows the KBPublisher interface. On the left is a sidebar with icons for home, files, drafts, and other functions. The main area is titled 'Files' and has tabs for 'Files', 'Drafts', 'Add Local Files' (which is selected and highlighted with a red box), 'Directory Rules', and 'Categories'. Below the tabs is a yellow informational box with text about adding local files and a note about file paths. Below this is the 'Local add' form. The form has fields for 'File(s):' (with a '+' icon highlighted by a red box), 'Category:' (with a text input and a list of categories), 'Title:', 'Description:', 'Author:' (set to 'Julia'), 'Tags:' (with a '+' icon and a '?' icon), 'Private:' (with checkboxes for 'Unlisted', 'Read', and 'Write'), and 'Status:' (a dropdown menu set to 'Published'). At the bottom of the form are two buttons: 'Add files' (highlighted with a red box) and 'Save as Drafts'.

Complete the form's fields:

- **Files** — Click the **[+]** icon. In the popup window, choose the 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 name of the directory on your server which holds the files you want to link to.
  - For **Amazon S3**, enter the S3 path in format: bucket\_name/prefix/... (prefix is optional)Then click the **[ >> ]** icon to display files. Check all files or check the checkbox for each file you want to link to, and click **Done**.
- **Category** — Add one or more categories for the files by clicking the **[+]** icon to the right of the **Category** field and selecting from the list of categories provided.
- **Title** — Add a title. If you are linking to more than one file in this operation, all files will have the same title.
- **Description** — Add a description. If you are linking to more than one file in this operation, all files will have the same description.
- **Author** — By default, you are identified as the author of the files. Click the **Delete** link to the right of your name to remove it.
- **Tags** — To add a tag, click **[+]**. You can add tags one at a time by hitting Enter after typing each tag. Or you can add multiple tags at a time by separating each with a space as you type. You can join 2 or more words together in one tag by enclosing them in quotation marks.  
To select a tag from your existing list (tags previously used in KBPublisher), click **Choose from your tags** and select the tags you want to use.

- **Private** — You can opt to restrict either or both **read** and **write** access to the files. If you check either check box, another field appears where you can specify which roles users must have to be able to read and/or update the file. If you select the **Unlisted** check box, the file will become available only for users who has a link to the file.
- **Status** — You can set the file status as **Published** or **Not published**.

When the form is complete, click **Add files** to add the files to the list on the **Files** tab.

If you have the correct permissions, you can add the files as drafts. Click **Save as Drafts** to add the files to the list on the **Drafts** tab. Use this option for files that you do not want to publish yet, or for files that require further review or approval before becoming available.

**Tips:**

- The files that are found are controlled by the **Allowed/Denied extensions** setting on **Admin** tab under **Settings**. If you have said there are no restrictions, then all files in the directory are found. If you have said only image and text files are loadable, then only image and text files will be found.
- The PHP **open\_basedir** setting determines where KBPublisher searches for the files. If you find that Get Files only searches the directories under the knowledgebase itself, then check your settings to see if PHP restricts it to this.

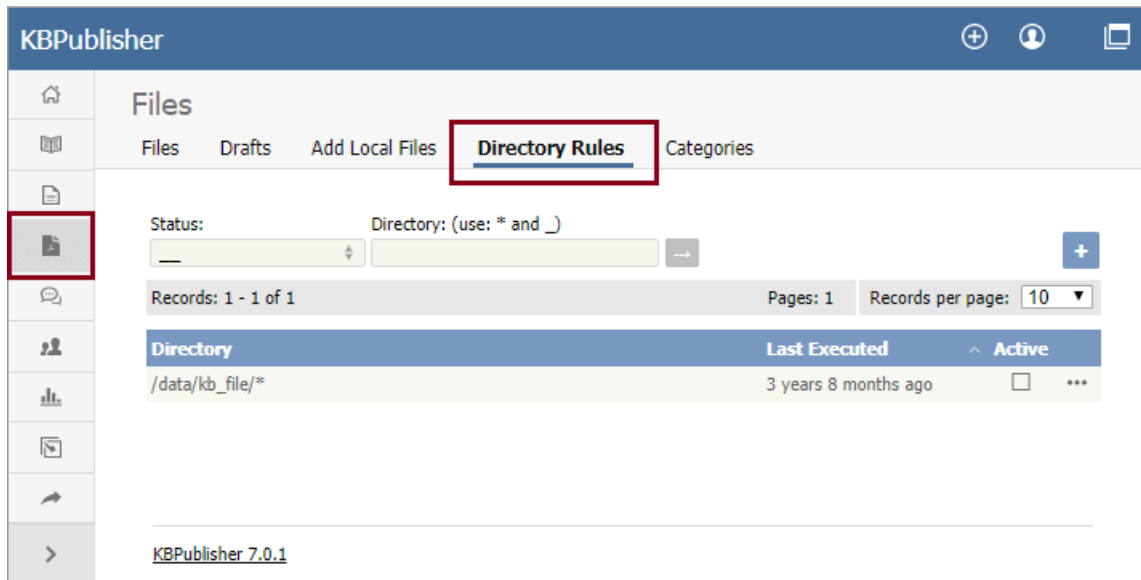
## Automatically Add Local Files

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:



[illegible]

**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.

## Add New File Category

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The quickest way to add a category is to use the **Shortcuts** menu at the top of your screen.

- Click on the drop-down menu in the top right of the screen and choose **Add new file category**.

Or you can do it via the **Categories** tab under **Files**.

- Click on the **Files** menu
- Choose the **Categories** tab
- Click on **Add New**.

Once you are on the category screen you must complete the following sections:

- Add a **Title**. This is the name that will be displayed on the left menu or in any table of contents.
- Define where it fits in the category hierarchy by choosing a **Parent category** and an **Order**. If you don't change these you will add a new top-level category and it will be placed last.

You may also:

- Control access through **Private** and **Active**
- By checking **Allow attach files**, files from this category will be allowed to be attached
- Designate an owner (**Supervisor**) for the category

You can find out more about each of these fields and how they work in [the Category screen explained](#).

### What the Private function does

The private option:

- Lets you force users to log on to read items
- Allows you to restrict who can read items
- Allows you to restrict who can edit or upload items.

It works for articles, files and news items, and can be applied at individual item level and at category level.

### Using the Private function

#### Force users to log on

If you mark an item as **private read** and *do not assign roles*:

- Users must log on to read the item
- Any user who is logged on can read it
- In the Public area users will not see the item until they are logged on
- In the Admin area all users will see the item.

If you mark an item as both **private read** and **private write** and *do not assign any roles*:

- Users must log on to read the item
- Users who are not logged on cannot see the item.

#### Restrict read access

If you mark an item as **private read** and *do assign roles*:

- Users must log on to read item
- Only users who belong to the nominated role can read the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- All users in the Admin area can see the item.

#### Restrict write access

If you mark an item as **private write** and *do assign roles*:

- All users can read the item
- Only users who belong to the nominated role can create, edit or update the item
- For articles, users will not see Edit Article and Quick Edit options in the Public view if they do not belong to the correct role

Note that if you mark an item as **private write** and *do not assign roles*:

- All users can see and read the item
- All users logged in to the Admin area with appropriate privileges can edit the item.

#### Restrict both read and write access

If you mark an item as both **private read** and **private write** and *do assign roles*:

- Users must log on to read the item
- Only users who belong to the nominated role can see or read the item
- Only users who belong to the nominated role can create, edit or post the item
- In the Public area, users who do not belong to the nominated role cannot see the item
- In the Admin area, users who do not belong to the nominated role cannot see the item

Note that private items work in conjunction with privileges. A user who does not have, say, author privileges, will still not be able to create articles even if they are assigned to a role that allows them access via private write.

### Set up private read, write, and unlisted

To restrict whole categories:

- Edit the file category.
- Choose **Private Read** if you wish to force users to log on and/or to restrict who can see files in this category. Choose **Private Write** if you wish to allow everyone to see and open files in the category but only people who have the specified roles to manage them (e.g. upload, delete). Choose both **Private Read** and **Private Write** if you wish to restrict who can read files and also who can manage them in the category.
- This brings up another option, **Access for assigned roles only**.  
By default, this is set to **None**, which means that users must log on to see and open files in this category, but anyone can see them once they have logged on.
- Select which roles users must belong to in order to read/manage files in the category.

- Click **Save**.

To restrict access to a single file:

- Edit the file.
- Choose **Private Read** if you wish to force users to log on to read the file or you wish to restrict who can see or open it. Choose **Private Write** if you wish to allow everyone to see and open the file but only people who have the specified roles to manage (e.g. delete) it. Choose both **Private Read** and **Private Write** if you wish to restrict who can see or open the file and who can manage it.
- This brings up another option, **Access for selected roles only**.  
By default, this is set to **None**, which means that the file is private, but all users can read it once they have logged on.
- Select which roles users must belong to in order to read/manage the file.
- Click **Save**.

To make a single file unlisted:

- Edit the file.
- Choose **Private Unlisted** if you wish to make the file available only for users who has a link to the file. The file will be hidden in **Downloads** of Public area as well as in search results.
- Click **Save**.
- In the **Details** section, you can copy a link for opening or downloading the file, and then give the link to a user.

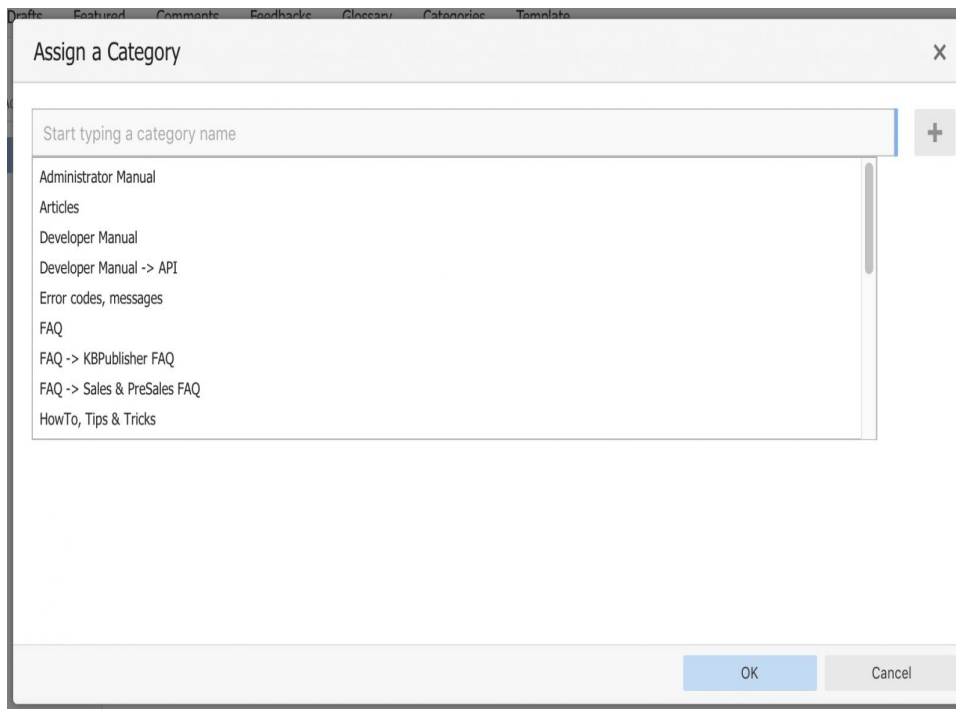
## Assign category to a file

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Assigning a category to a file is a two-part process. First you assign the category, and then you define the order the item is displayed in that category

### To assign the category

- Create or edit the article.
- Click on the plus (+) button on the right-hand side of the category field.  
This opens the Assign a Category screen



- Select a category by using the text entry field at the top of the screen. You can start typing a category name to filter the category list.  
You can select multiple categories.
- Click **OK** to save your changes and exit the Assign a Category screen.

On the Assign a Category screen you can also:

- Unassign categories from this article by clicking the **x** button.
- Drag and drop categories into your preferred assignment order.
- Select which category the article will be published in, and which categories the article will be listed in.

#### Tips:

To quickly assign a category without opening the Assign a Category screen you can:

- Start typing a category name and then select the category.

To quickly unassign a category without opening the Assign a Category screen you can:

- Double-click on a category in the **Category** box.  
OR
- Click on a category in the **Category** box, and then click the **minus (-)** button.

### To order the category

When you exit from assigning the category the new categories are listed at the bottom of the screen.

- This will now contain a list of each category you have added, and an order. By default, articles are placed at the end of the category.
- Click on the order drop-down list beneath the category you wish to re-order

Files   Drafts   Add Local Files   Categories

---

**Add new:** Max file size: 2 mb | Max post size (all files): 8 mb

\* File: Буфортъ gain gain we aufpaw

\* Category: Start typing a category name

Attachments  
Patches -> Version 6.0

Title:

Description:

Tags:

Private: ☐ Read ☐ Write

Schedule: ☐ Yes

Order: **Order**

Attachments:

AT THE END (default)

AT THE BEGINNING

✓ AT THE END (default)

2 AFTER: UserManual.doc

3. AFTER: User Manual.doc

Status:

- Select a new position from the list
- Click **OK** to save the changes,

## Delete a file

---

To delete a file:

- Choose **Files** menu
- Click on the **Files** tab
- Click **Delete** from the options dropdown menu under Actions
- Click **OK** to confirm that you really do want to delete the file
- You will be presented with a warning message asking if you wish to delete the file from disk
  - Choose **No, just delete record from DB** if you wish to delete it from the knowledgebase but leave the file on the server
  - Choose **Yes, delete from disk** to remove the file altogether.

### Note:

- If a file is attached to an article it cannot be deleted.

## Enable searching in files

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Text-based file searching/indexing (txt, html, etc.) is enabled by default. If you want to include searching PDF or Word documents then you need to do the following.

### Searching in PDFs

To enable search in PDFs you need to:

- Install a program called **xpdf**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your xpdf directory. (Check your *open\_basedir* PHP setting in *php.ini*)
- Ensure that PHP can run the [system](#) function. (Check your *disable\_functions*, *safe\_mode\_exec\_dir* PHP settings in *php.ini*)

#### Install xpdf

- xpdf is available from [www.foolabs.com/xpdf/download.html](http://www.foolabs.com/xpdf/download.html)
- Download and install it.

#### Update the setting to point to xpdf

Once you have installed xpdf, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Admin -> XPDF installation path**
- Make sure that this points to the directory where you installed xpdf. For example: */usr/local/bin/* or *c:/wwwroot/xpdf/*
- Set this to 'off' to de-activate this option.
- When you click "Save", test pdf file will be parsed/indexed and error occurs if it failed.

#### Test xpdf from command line

Test to see if xpdf is working by running the following command from the command line:

```
$ /path_to_xpdf/pdftotext -raw file_read.pdf file_write.txt;
```

Test xpdf from command line using PHP and included test file:

```
$ cd /path/to/kbp_directory
$ php -r "system('/path_to_xpdf/pdftotext -raw admin/extra/file_extractors/extract_test.pdf file_write.txt');"
```

### Searching in Word 2007/2010, Excel 2007/2010 or Open Office document files

To enable search in .docx, .xlsx and .odt documents you need to:

- Install a [PHP Zip](#) extension if you do not have one
- You can see if you have it installed in *Home -> Setup Tests* tab in your KBPublisher installation

### Searching in Word 2003 and below files

To enable search in Word documents you need to:

- Install either **catdoc** or **Antiword**
- Ensure **Settings** points to where you installed it
- Ensure that PHP has access to your catdoc directory. Check your *open\_basedir* PHP setting in *php.ini*.
- Ensure that PHP can run the [exec](#) function. Check your *disable\_functions*, *safe\_mode\_exec\_dir* PHP settings in *php.ini*.

#### Install catdoc

- catdoc is available from <http://www.wagner.pp.ru/~vitus/software/catdoc/>
- Download and install it.

#### Install Antiword

- **Antiword** is available from <https://github.com/grobian/antiword>
- Download and install it.

#### Update the setting to point to catdoc

Once you have installed catdoc, you also need to set the correct path it in the Settings.

- You can find this under Settings menu, **Settings -> Admin -> catdoc installation path**
- Make sure that this points to the directory where you installed catdoc. For example: */usr/local/bin/* or *c:/wwwroot/catdoc/*
- When you click "Save", test pdf file will be parsed/indexed and error occurs if it failed.

#### Test catdoc from command line

Test to see if catdoc is working by running the following command from the command line:



```
$ /path_to_catdoc/catdoc -w file_read.doc;
```

Test catdoc from command line using PHP and included test file:

```
$ cd /path/to/kbp_directory  
$ php -r "system('/path_to_catdoc/catdoc -w admin/extra/file_extractors/extract_test.doc');"
```

### **Test antiword from command line**

Test to see if antiword is working by running the following command from the command line:

```
$ /path_to_antiword/antiword -t file_read.doc;
```

Test antiword from command line using PHP and included test file:

```
$ cd /path/to/kbp_directory  
$ php -r "system('/path_to_antiword/antiword -t admin/extra/file_extractors/extract_test.doc');"
```

## **Turning PDF or Word search off**

If you don't want to allow searching on PDF or Word documents, change the setting in *XPDF installation path* or *catdoc installation path* to **OFF**.

## Remove scheduling

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To remove scheduling from an article, file or news:

- Edit the item
- Uncheck the **Schedule** checkbox

You can also use the bulk actions option to remove scheduling from multiple articles or files:

- Select each item to be un-scheduled
- Choose **remove schedule** from the **Actions with selected** options at the bottom of the screen.

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*This functionality works in version 3.5 and above*

## The file history screen explained

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The History screens shows all versions of an file. From here you can compare earlier versions with the current one, revert to earlier versions, delete versions and you can download a copy of a specific version.

For details please see article [The file history screen explained](#), file history has the same functionality.

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*This functionality works in version 8.0 and above*

## File history

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KBPublisher keeps a history of all changes you make to the content of an file. You can view earlier versions and compare them against the current version to see what has changed and you can roll back to earlier versions

By default, version control is turned on, and set to store unlimited number of revisions.

To turn off version control

- Click on **Settings** menu
- Choose the **Admin** tab
- In Files section set the **maximum number of revisions** to 0

To change the maximum number of versions stored

- Click on **Settings** menu
- Choose the **Admin** tab
- In Files section set the **maximum number of revisions** to the number of versions you want retain, use All to keep unlimited number of revisions.

To view or recognize if an article has prior versions

- Click on the **Files** menu
- Choose the **Files** tab
- Find the file in the list
- Click [...] icon on the right, select History from drop down menu.

### Tip

- Only changes to file content are stored. If you modify the category or title, or update metadata, this is not stored in the version history.

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*This functionality works in version 8.0 and above*

