

Table of Contents

Table of Contents	1
Users	2
The User input screen explained	3
Add a user	5
How to Change User Status	6
Master Your Knowledge System with KBPublisher Video Guides	7
Bulk update users	8
Import users	9
Companies	11
Generating API Keys	12
User Activities	13
Privileges	14
Agile Permission Management for Your Knowledge Base	15
How privileges work	16
Create new user privilege	17
Change user privilege	18
Set default user privileges	19
The Privilege Screen Explained	20
Roles	22
User roles	23
Create new user role	24
Changing User Roles in Your Knowledge Management System	25
Configuring Default Roles for Knowledge Capture & Management	26
My Account	27
My Account	28
Editing Profile Info	29
Account Security	30
Viewing Must Read Articles	32
Managing Notifications	33
Managing Favorites	34
Managing Subscriptions	36
How to Change Your Password in KBPublisher	39
How to Display More Articles in Your Knowledge Base	40
Change the order articles and files are displayed in	41

Users

All about users

The User input screen explained

You can't have a knowledgebase without users. In KBPublisher we have readers, contributors, authors, editors, moderators and administrators. Or you can set up your own user types.

The screenshot shows the 'KBPublisher' interface with a sidebar on the left containing icons for home, users, companies, roles, and privileges. The main content area is titled 'Users' and has tabs for 'Users', 'Companies', 'Roles', and 'Privileges'. The 'Users' tab is active, and the 'Add new' form is displayed. The form contains 14 numbered fields:

- * First Name:** Text input field.
- * Last Name:** Text input field.
- Middle Name:** Text input field.
- * Email:** Text input field with a 'Set by email' link.
- Phone:** Text input field.
- Company:** Dropdown menu with a '+' button and a 'Set by email' link.
- Role:** List box with '+' and '-' buttons and a '?' icon.
- Privilege:** Dropdown menu with a '?' icon.
- * Username:** Text input field with a 'Set as email' link.
- * Password:** Text input field with a 'Generate random password' link.
- * Verify Password:** Text input field.
- User Notes:** Text area with a '+' button.
- Private Admin Notes:** Text area with a '+' button.
- Subscribe:** List box with 'All' and 'None' options.
- Status:** Dropdown menu.
- Notify user:** Checkbox with 'Yes' label.

At the bottom of the form are 'Save' and 'Cancel' buttons.

1. **First Name**, **Last Name** and **Middle Name** make up the user's name. First and last name are compulsory, middle name is not.
2. **Email** is the user's email address. This is the email to which all KBPublisher communications will be sent. Email is also compulsory. Emails are also unique, so you cannot have more than one user in the knowledgebase with the same email address.
3. **Phone** is the user's contact telephone number.
4. **Company** is the company the user works for. If you intend to associate a company with the user, then this company must have first been set up in KBPublisher.
5. **Roles** allow you to group users, and to further control what content a user can see.

To add a role:

- Click on the [+] to the right of the role field. This takes you to a new screen listing all roles
 - Select a role you wish to allow the user to take and the role appears in the list of assigned ones
 - When you are done, click **OK** to return to the user screen
6. **Privileges** control the type of access the user has to KBPublisher.

There are five default privilege groups.

- **Administrator** sets up the system, controls user accounts, designs the site and so on
- **Moderator** has access to every part of the system except Settings and Import/export. The moderator generally creates users, organizes categories and manages the knowledgebase on a day to day basis
- **Editor** can add, edit and delete their own and other users articles, files, comments and visitors' questions. This is the person responsible for the overall content of the knowledge base.
- **Author** provides the actual content. An author can add, edit, delete or publish their own articles and files. When they have completed an article and published it, the article appears immediately in the article list
- **Contributor** also provides content, and can add edit or delete their own articles and files but the articles and files

do not appear in the knowledgebase immediately. They must be approved by an editor or a moderator. Once an article or file is approved, the contributor can no longer edit it.

You can also create your own privilege groups.

Users may also be set up with no defined privilege. These are the **public** users.

7. The **Username** is the name the user uses to log on. If you click **set as email** here, the username will be the name you typed into the email field. You must provide a username.
8. The **Password** is the password the user will use to log on. Because this is a password, the text you type is replaced by dots. You can also generate a random password instead, by selecting **Generate random password**.
9. Because there is no way of seeing what you typed into the **Password** field, you need to retype the password into the **Verify Password** field.
10. **User notes** are comments the user adds when he or she fills in the form to request user access.
11. **Private Admin notes** are notes that can be added by the administrator when adding or updating the user. The user does not see these.
12. The administrator adding the user can automatically **subscribe** them to news, files and articles. The user is then notified of any changes to these. Click **All** to subscribe them to all changes, or click to select individual subscriptions. Use <Shift> or <Ctrl> to select more than one.
13. A user must be **Active** to be able to log on to the system. An **inactive** user cannot log onto the system at all, and user who is **pending (approval required)** has been set up but is still not able to access the system until a moderator or administrator approves them.
User statuses could be managed at *Tools -> Lists -> User Status*.
Note that inactive users can still see any parts of the public area that are open to everyone. That is, that users don't have to log on to see.
14. If **Notify user** is checked, the user will receive an email once their access has been set up.

*Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0.
For a complete list of changed/new functionality, please see [version 4.0 release notes](#)*

Add a user

To add a new user

- Click on the **Users** menu
- Click on **Add New**.

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

- Give the user a **First Name** and a **Last Name**
- Add their **Email**
- Give them a **Username**. If you prefer, you can set their email as their user name.
- Set up a **Password**

The following items are optional:

- Assign a **Privilege**. If you do not assign a privilege the user will have standard read access to the public area.
- To classify the user, and provide another level of access, include a **Role**.
- You can include extra user details such as a **Middle Name, Phone** and **Company**
- You can add comments about the user or registration
- You can automatically subscribe them so that they receive changes to news, articles or files
- To give the user immediate access to the system, make this user **Active**
- To send an email to the user after then that their user ID has been created, check **Notify User**.

You can find out more about each of these fields on the User screen and how they work in the [User Screen Explained](#)

Once your user has been set up:

- Click **Save**.

Tips:

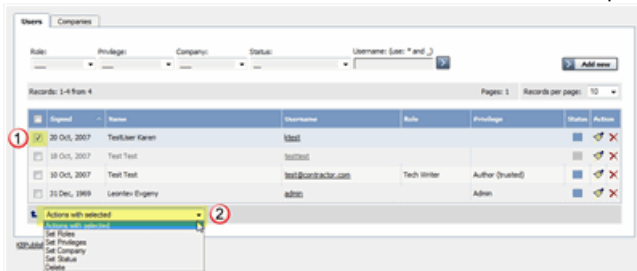
- If you have a number of users to add from another database, say, you may want to [import users](#) instead of adding them
- Or you may choose to [allow users to register](#), which effectively allows them to create their own user.

How to Change User Status

There are two ways to change the status of a user.

The quickest way allows you to update the status of more than one user at the same time.

- Click on the **Users** menu
- Check the box to the left of the user or users you wish to change
- Choose **Set Status** from the **Actions with selected** drop down box



- This brings up another drop down box with a list of statuses to choose from
- Select the status you wish to change to
- Click **OK**
- You will be asked if you really want to change the status. Click **OK** to confirm.

The other way to change the status of the user is to:

- Click on the **Users** menu
- Click on the paintbrush under **Actions** to **edit** the user
- Change the **Status**
- Click **OK**.

This second method only allows you to change the status of one user at a time.

The quickest way to delete a single user is to:

- Click on the **Users** menu
- Click **Delete** from the options dropdown menu under Actions
- In Actions column click icon [...] and in drop down menu click **Delete**
- Click **OK** to confirm the deletion.

The second way allows you to delete more than one user at the same time.

- Click on the **Users** menu
- Check the box to the left of the user or users you wish to delete
- Choose **Delete** from the **Actions with selected** drop down box
Click **OK**
- You will be asked if you really want to delete the user. Click **OK** to confirm.

Bulk update users

KBPublisher allows you to bulk update users to:

- Set roles
- Set privileges
- Assign users to a company
- Automatically subscribe them to news, articles or files
- Set the user status
- Delete users.

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

The screenshot shows the KBPublisher interface with the 'Users' tab selected. The interface includes a sidebar with navigation icons, a top header with the KBPublisher logo and user profile, and a main content area. The main content area has tabs for 'Users', 'Companies', 'Roles', and 'Privileges'. Below the tabs are filters for Role, Privilege, Company, Status, and a search bar. A table displays a list of users with columns for ID, Signed, Last Logged, Username, Role, Privilege, API, and Status. A dropdown menu is open over the table, showing 'Actions with selected' and a list of actions: Set Roles, Set Privileges, Set Company (highlighted), Set Subscription, Set Status, and Delete. A 'Clear Selection' link is also visible.

ID	Signed	Last Logged	Username	Role	Privilege	API	Status
184	02 Jun, 2019	1 month ago	kbpublisheruser@mail.com				...
183	11 May, 2019		Laser				...

To update the users:

- Check one or more users 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.

Import users

You can import users in bulk. You might want to do this if you are changing over to KBPublisher from an old system, or if you have signed up a new company or organization and the company provides you with a list of users to create.

The process is:

- Create a file of users to import
- Upload a test sample to the system
- Import.

Create a file of users to import

First, you need to create your file of users. This is a comma-separated (CSV) text file that consists of some or all of: **first name, last name, email, username**, user ID, date registered, middle name, telephone number and an active flag.

- The first five fields (highlighted bold) *must* be included. You can include some, all or none of the others as required.
- They do not have to be in the same order as above, but each line in the import file must contain the same fields in the same order.
- The password is encrypted. You cannot import plain text passwords; they must be encrypted in MD5 format. Ensure that the person providing you with the list encrypts the passwords.
- The active flag defaults to '1', which is active, so the only time you would set this is if you don't want the users to be active.
- Place the data for each user onto a single line, and separate each field by a comma. Do not include spaces before or after the comma.
- The [TestImportUsers.csv](#) file is a sample that shows what your upload file should look like. This file includes the four default fields only.
- Field sizes and types are specific, as per the table below. Your data must fit within these parameters or the upload will fail.

Field	Type/size	M/O	Comments
first_name	varchar(50)	compulsory	
last_name	varchar(100)	compulsory	
email	varchar(100)	compulsory	
username	varchar(50)	compulsory	
date_registered	date	optional	Format YYYY-MM-DD. If not supplied will use current date.
middle_name	varchar(50)	optional	
phone	varchar(20)	optional	
active	tinyint(1)	optional	Default = 1

Create a test file

Don't try to upload the whole file without testing it first. If something goes wrong you may then have to delete all those half-imported users and try again. Create a test file and run that first.

- Copy the first, say, three lines of your text import to a separate file
- Either:
 - Save the file to a local drive (e.g. somewhere on your c: drive)
 - Upload the file to the server

Import the test file

You are now ready to import the *test* file to KBPublisher.

- Click on the **Import/Export menu**
- This brings up the **Import Users** tab
- If the import file is on your c: drive (or another local drive),
 - Choose **Load Data Local File** in the **SQL Load Command** field
 - **Browse** for the **CSV file** on your drive and open it
- If the import file is on the server,
 - Choose **Load data file**
 - Type the address where the file is located into the **Path to file** field on **CSV file** line

- Move the **CSV fields** around to specify which fields are in the file and what order they are in. Do this by clicking on the name of the field you want to move and dragging and dropping it into the appropriate place.

For example, suppose you only want the five mandatory fields included. You need to move the *date_registered* and *imported_user_id* fields out of the **Fields in CSV** box and into the **Available table fields** box. Let's start with the *date_registered* field.

- Click on the *date_registered* field and hold the mouse down
- While holding the mouse down, **drag** the *date_registered* field over to the **Available table fields** box
- **Drop** the field into the box by releasing the mouse



Make sure that you place it in the order it appears in the file.

- Change **CSV options** if required.
- Click **Load**.

Once the load is complete you are returned to the Import Users tab. At the top of the screen you see a message telling you whether the import was successful and how many users were imported.

- If the import reports as successful, click on the **Users** tab to check the result for yourself.

Fix any problems

All going well, you should now have three new users. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these three users, fix the test file and run it again. Keep fine-tuning until it works, and then update the real file to match the fixes you made in the test file. You are now ready to import the rest of the users.

Import users

Import the rest of the users using the same process as for the test file, only this time using the real data file.

Note:

- Imported users have no roles or privileges.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.
- Use the **bulk actions** option in **Users** module to change roles, privileges, etc.

Companies

Companies provide another level of information about users. When you create a user you can assign the user to a specific company.

Companies are not compulsory in the knowledgebase. You would use them if your users were from a small number of companies, but if your users came from all around the world and were a mix of individuals and company users you probably would not bother.

Some examples where you might use them:

- Your users come from a finite number of companies and you have multiple users in each company
- When you license the knowledge in your knowledgebase and charge the company for access

Some examples where you probably wouldn't:

- Your users come from all around the world
- You would have to set up a different company for every user
- When there is only one company (although you could also set up the company in this case; it wouldn't matter either way).

Generating API Keys

For API authentication Public and Private keys are required.
Each user has his own unique keys.

To generate and assign keys to user:

- Login to Admin Area
- Click **User** tab
- Click the Options icon under Actions to display the dropdown list, and then click **Details**
- Click **API Settings**, it will open for with API Settings
- Check **API Access** to allow user API requests or uncheck to disallow
- Click **Generate API Keys** if you assign keys in first time or **Reset API Keys** if updating

Important: if you reset API keys it will affect all current scripts for this user

The **Activities** tab lets you view activity on your site related to a specific user. You can find actions performed by a specific user, actions related to specific articles by this user, or other types of content. This tab duplicates the functionality of the [User Activity Report](#) but is filtered to a specific user.

To open this tab from **Users ► Users**, click on the [...] icon in the last column for the desired user.

KBPublisher

Home

Users

Companies

Roles

Privileges

[177], Ivanov, Ivan

Edit

Details

Activities

API Settings

Change Password

More ▾

← Back

Entry:

Action:

Period:

Entry ID:

User IP:

Custom per ▾

From: 01/01/2019 To: 07/22/2019

Navigate by years ▾

← Previous | 2019 | Next →

Records: 1 - 10 of 139 Pages: 1 ▾ of 14 >>> Records per page: 10 ▾

Time	Entry type		Entry ID	User IP
27 Jan, 2019				
11:11 AM	User	Login		5.122.122.122
11:15 AM	Article	View	356	5.122.122.122
11:15 AM	Article	View	356	5.122.122.122
11:16 AM	User	Login		5.122.122.122

KBPublisher 7.0.1

See [this article](#) for details on the User Activity Report.

Privileges

Agile Permission Management for Your Knowledge Base

Any user can read articles, but in order to create articles and to publish them to the knowledgebase, users must have certain privileges.

For example, to actually write articles a user must have author or contributor privileges.

To publish the article for other users to read, they must be in the author, editor or moderator privilege groups. KBPublisher comes with five default privilege groups, and you can also create your own.

There are five default privilege groups.

- **Administrator** sets up the system, controls user accounts, designs the site and so on
- **Moderator** has access to every part of the system except Settings and Import/export. The moderator generally creates users, organizes categories and manages the knowledgebase on a day to day basis
- **Editor** can add, edit and delete their own and other users articles, files, comments and visitors' questions. This is the person responsible for the overall content of the knowledge base.
- **Author** provides the actual content. An author can add, edit, delete or publish their own articles and files. When they have completed an article and published it, the article appears immediately in the article list
- **Contributor** also provides content, and can add edit or delete their own articles and files but the articles and files do not appear in the knowledgebase immediately. They must be approved by an editor or a moderator. Once an article or file is approved, the contributor can no longer edit it.

You can also create your own privilege groups.

Here is a quick chart of default user types in KBPublisher

	No privileges not logged in	No privileges logged in	Contributor	Author	Editor	Moderator	Admin.
Read published articles/files	●	●	●	●	●	●	●
Read private published articles/files		●	●	●	●	●	●
Add comments*	●	●	●	●	●	●	●
Rate articles*	●	●	●	●	●	●	●
Email administrator*	●	●	●	●	●	●	●
Create articles			●	●	●	●	●
Edit/delete own draft articles/files			●	●	●	●	●
Edit/delete own published articles/files				●	●	●	●
Edit/delete other authors' articles/files					●	●	●
Publish articles				●	●	●	●
Add/edit delete glossary items					●	●	●
Manage user comments					●	●	●
Manage categories						●	●
Create/edit/update users						●	●
Manage templates						●	●
Import/export articles/users							●
Change KBPublisher settings							●

Privilege levels

Each user type has a **privilege level**. The privilege level defines who can edit users of this level. Users cannot edit other users with a privilege level lower than or equal to their own.

Admin users always have a privilege level of 1. They can edit any other user. In the standard setup editors have a privilege level of 3, while authors have a privilege level of 4 and contributors 5. This means that an editor could--if he had edit user access--edit author and contributor users while a contributor could not edit any users except other contributors (again, and only if he had edit user access). None of them can edit admin users.

This gives an extra level of security when editing users.

* Adding comments, rating articles and sending emails to the administrator are all options that can be turned on or off in the settings. Hence while these options are available, they must also be [turned on](#) if you wish to use them.

How privileges work

User access is controlled by privileges.

There are five default privilege groups.

- **Administrator** sets up the system, controls user accounts, creates templates, designs and so on
- **Moderator** has access to every part of the system except settings. The moderator generally creates users, organises categories and manages the knowledgebase on a day to day basis
- **Editor** can add, edit and delete articles, files, comments and visitor feedback. This is the person responsible for the overall content of the knowledge base. They are also the person who manages visitor comments and feedback.
- **Author (trusted)** provides the actual content. A trusted author can add, edit or delete articles and files. When they have completed an article and published it, the article appears immediately in the article list
- **Author (untrusted)** also provides content, and can add edit or delete articles and files but their articles and files do not appear in the knowledgebase immediately. They must be approved by an editor or a moderator. Once an article or file is approved, the untrusted author can no longer edit it.

Default privileges

	No privileges not logged in	No privileges logged in	Contributor	Author	Editor	Moderator	Admin.
Read published articles/files	●	●	●	●	●	●	●
Read private published articles/files		●	●	●	●	●	●
Add comments*	●	●	●	●	●	●	●
Rate articles*	●	●	●	●	●	●	●
Email administrator*	●	●	●	●	●	●	●
Create articles			●	●	●	●	●
Edit/delete own draft articles/files			●	●	●	●	●
Edit/delete own published articles/files				●	●	●	●
Edit/delete other authors' articles/files					●	●	●
Publish articles				●	●	●	●
Add/edit delete glossary items					●	●	●
Manage user comments					●	●	●
Manage categories						●	●
Create/edit/update users						●	●
Manage templates						●	●
Import/export articles/users							●
Change KBPublisher settings							●

You can also [create your own privilege groups](#).

You can stop all users in a privilege group from logging on by making the privilege inactive.

Create new user privilege

Privileges control what a user can do on the system. There are five default privilege groups, but you can also create your own. You must have administrator access to create new privileges.

To create a new privilege group:

- Click on **Users**
- Choose the **Privileges** tab
- Click **Add New**

Complete the following:

- **Title** is compulsory
- **Privilege level** is also compulsory. This controls user security. Users cannot edit users with a privilege level less than their own, even if the access settings allow them to edit users.
- Check privileges as required. A user will be able to do anything that is checked. The [privilege screen explained](#) tells you how each of the options work.

You may also wish to:

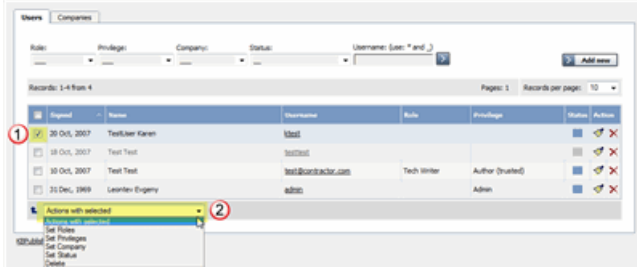
- Add a **description** to explain why this group has been set up and how it should be used
- Prevent users in this group from logging on by making the group **inactive**.

Change user privilege

There are two ways to change the user's privilege.

The quickest way allows you to update the privileges of more than one user at the same time.

- Click on the **Users** menu
- Check the box to the left of the user or users you wish to change
- Choose **Set Privilege** from the **Actions with selected** drop down box



- This brings up another drop down box with a list of privileges to choose from. One of these options is to 'remove all privileges'. This sets the user back to a standard public user.
- Select the privilege you wish to change to
- Click **OK**
- You will be asked if you really want to change the privilege. Click **OK** to confirm.

The other way to change the privilege of the user is to:

- Click on the **Users** menu
- Click on the paintbrush under **Actions** to **edit** the user
- Change the **Privilege**
- Click **OK**.

This second method only allows you to change the privilege of one user at a time.

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.

The Privilege Screen Explained

KBPublisher

Users Companies Roles **Privileges**

Add new

1 *Title:

2 Description:

3 Active: ☒ Yes

Module title	Privilege
Home	<input checked="" type="checkbox"/> Read
Statistics	<input type="checkbox"/> Read
4 News	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Add <input type="checkbox"/> Update <input type="checkbox"/> Status <input type="checkbox"/> Delete
News 5	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Add 6 <input type="checkbox"/> Update <input type="checkbox"/> Status <input type="checkbox"/> Delete
Articles	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Add <input type="checkbox"/> Update <input type="checkbox"/> Status <input type="checkbox"/> Delete
	<input type="checkbox"/> Read <input type="checkbox"/> Add <input type="checkbox"/> Update <input type="checkbox"/> Status <input type="checkbox"/> Delete

1. **Title** is the name of the privilege. Title is compulsory.
2. **Description** is used to remind you what the privilege is for. For example, when the administrator creates a new privilege, he or she would use the description to explain what the privilege does and how it should be used.
3. When the privilege is set to **Active** (that is, active is checked), users with this privilege can log in. If it is not set, then users with this privilege cannot log in. Thus, with one click you can prevent all users with a specific privilege from logging in.
4. You can control the privileges for each module in KBPublisher separately. This means you can give access just to one area only if you wish. For example, you may allow access to the knowledgebase, but not to Files, Feedback, Users, Settings or Import/Export. Or you may have hired a contractor to import a list of users for you, and you give them access to the Import/Export section only, but not to other areas of the knowledgebase.
5. Or you can apply privileges to each sub-module.
6. Most of the privileges are self-explanatory.

- When **Read** is checked the user can view items. If **own records** is also checked, they can only read records they have created. Otherwise they can read all records. **Belong to own records** denotes items like comments, and allows the user to manage comments that belong to items where **own records** is checked.
- When **Add** is checked they can create new items. If **As draft only** is checked, they can add only drafts.
- When **Update** is checked they can change existing ones. If **own records** is also checked, they can only update records they have created. Otherwise they can update any record. If **As draft only** is checked, they can update articles as draft only. **Belong to own records** means that the user can update comments for items they own.
If status, then the user can only update articles with the assigned status. (To select more than one status hold the <Ctrl> key down and click each status you want.) If no status is selected, the user will be able to update records with any status.
- When **Delete** is checked the user can delete items. If **own records** is also checked, they can only delete records they have created. Otherwise they can delete any record. **Belongs to own records** means that the user can delete comments for items that are designated as their own.
If one or more statuses are selected under **If status**, then the user can only delete articles with the assigned status(es).
- **Status** allows the user to change the status of an article from, say, unpublished to published. If **own records** is checked, then the user can only change the status of records they have added.
If one or more status is selected under **allowed status to set**, then the user can only change items to the selected status(es). If no status is selected, the user can change the record to any status.

Privilege levels

Privilege level denotes the level of security for this privilege. Users cannot update other users with a privilege level lower than or equal to their own, even if they have user update access.

You can manage Privilege level by clicking [...] icon on the right in privilege list view screen.

Roles

User roles

Roles allow you to set up a hierarchy of users and to control which articles users can see.

Roles are set up as tree structures, and when you mark an entry as private to a specific role then users with this role and with parent roles have access to the article. Any role below it in the tree, and roles that do not belong to 'current tree', will not be able to access the article.

For example, suppose you have the following roles:

Title
Employees
Customers
Contractors
↳ Manager
↳ Beta Tester
↳ Tech Writer
↳ Programmer
Partners

In the above tree the Contractors role has a sub-role of Manager, and below that sub-sub-roles of Beta Tester, Tech Writer and Programmer.

Users can be assigned to multiple roles. Thus your programmer could also be an employee.

If you mark an article [private read](#) and assign to it a role of 'Programmer', then contractor managers and programmers will be able to access the entry. No one else will have access to this article.

Note:

- Users with administrator privilege have access to any article in any category.

Create new user role

Roles control access to knowledgebase articles and files.
Some default roles have been created, but you can also create your own.

You must have administrator access to create new roles.

To create a new role:

- Click on **Users**
- Choose the **Roles** tab
- Click **Add New**

The following are compulsory:

- You must include the role name in the **Title**
- The **Parent role** denotes where in the list of roles this role is placed. If you choose 'Top Level' your new role becomes a top level role. Otherwise, choose the parent role for your new role.

You may also wish to:

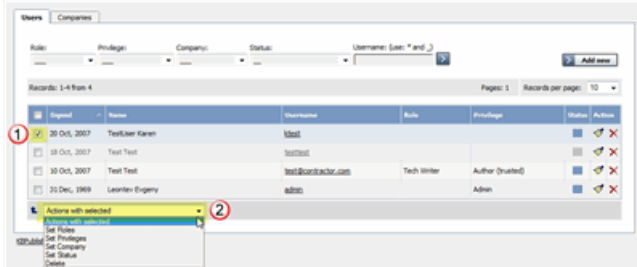
- Add a **description** to explain why this role has been set up and how it should be used

Changing User Roles in Your Knowledge Management System

There are two ways to change the role of a user.

The quickest way allows you to update the role of more than one user at the same time.

- Click on the **Users** menu
- Check the box to the left of the user or users you wish to change
- Choose **Set Role** from the **Actions with selected** drop down box



- This brings up another drop down box with a list of roles to choose from. One of these options is to 'remove all roles'.
- Select the role you wish to change to
- Click **OK**
- You will be asked if you really want to change the role. Click **OK** to confirm.

The other way to change the role of the user is to:

- Click on the **Users** menu
- Click on the paintbrush under **Actions** to **edit** the user
- Change the **Role**
- Click **OK**.

This second method only allows you to change the role of one user at a time.

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.

My Account

How to use My Account

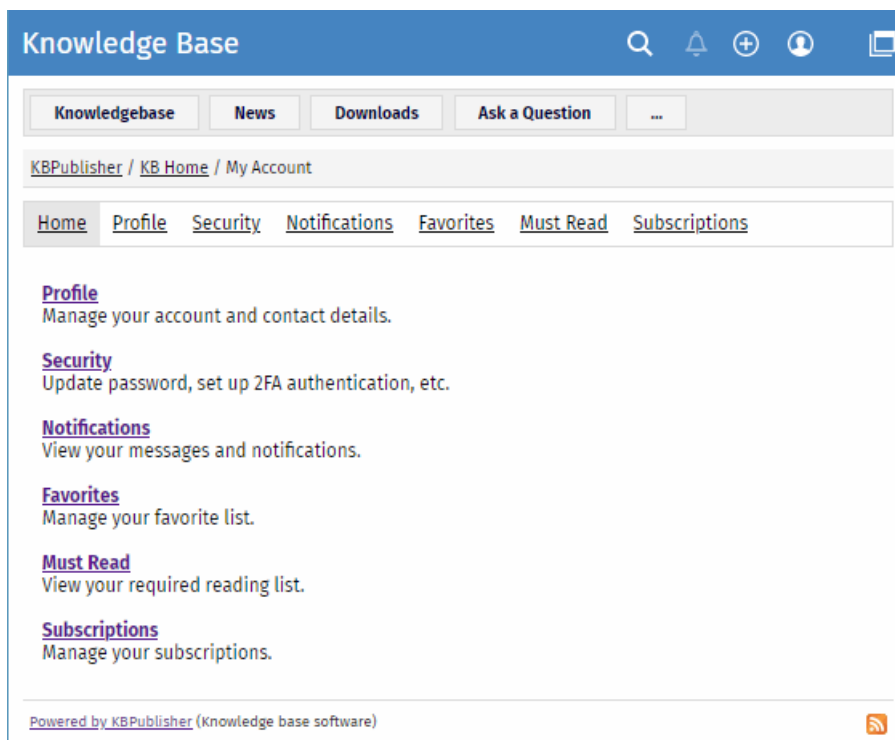
My Account

KBPublisher provides a personal profile page which allows you to do the following:

- Update your profile information
- Enable multi-factor authentication
- Read new notifications
- Read articles that you added to your Favorites list
- Read articles that your Administrator set as must-read
- Subscribe to articles, news, and categories as well as unsubscribe from them
- Change your current password
- Delete your account

To open your profile page, perform these steps:

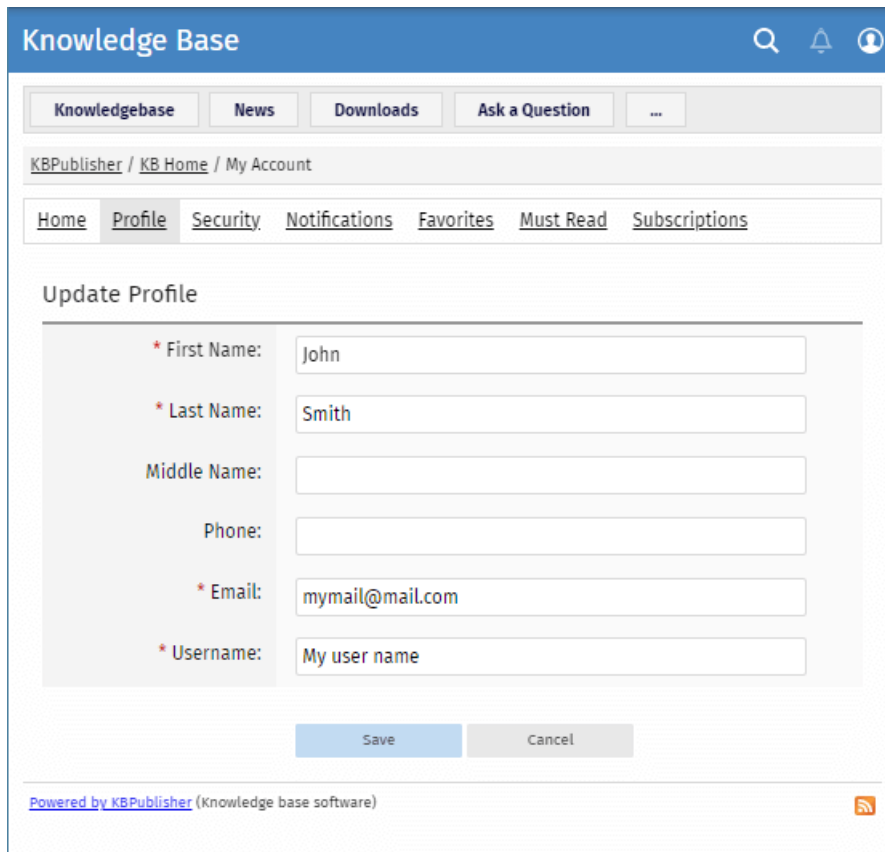
- Log in to the knowledgebase.
- In the top right corner, click the account icon, and then select **My Account**.
You will see the **Home** page of your personal profile page:



The personal profile page consists of several sections that access you to its features listed above. The **Home** page provides brief information on what you can do in each section.

Editing Profile Info

You can view and edit your account info in the **Profile** section of your personal profile page:



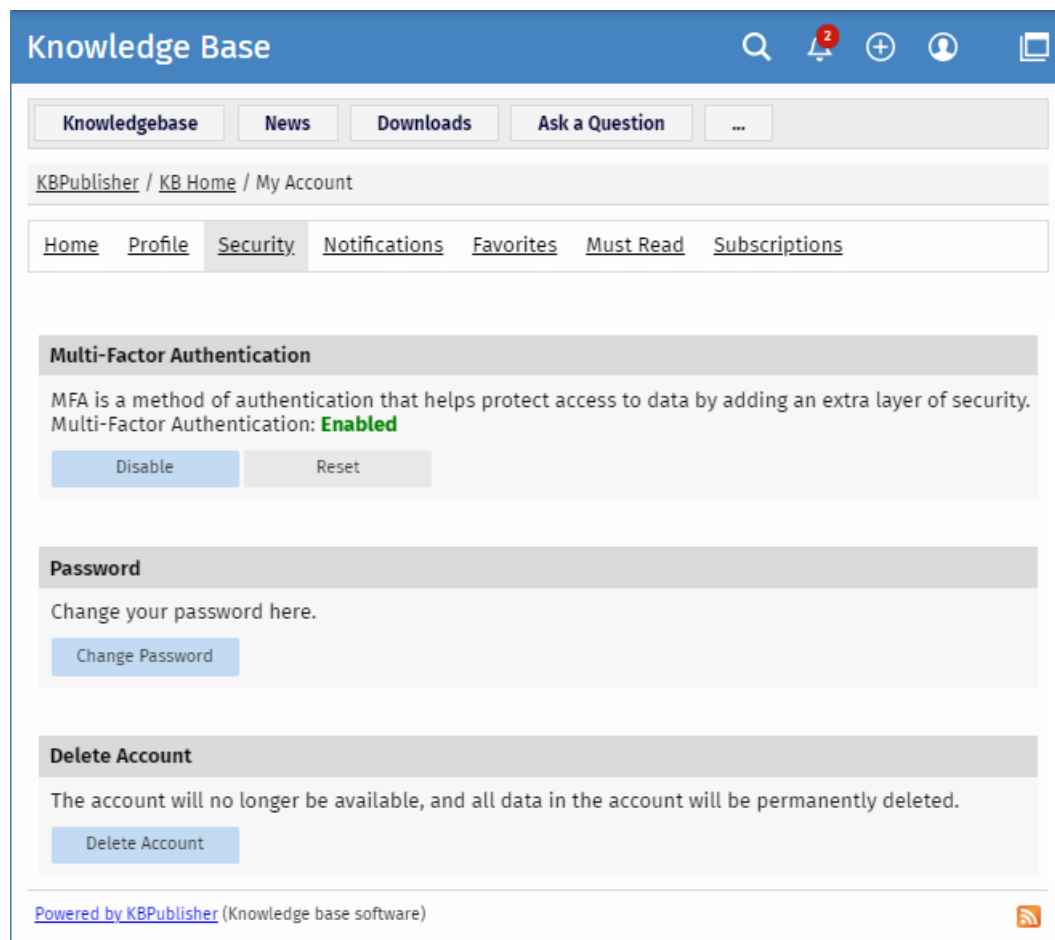
The screenshot shows a web interface for a 'Knowledge Base'. At the top is a blue header with the title 'Knowledge Base' and icons for search, notifications, and a user profile. Below the header is a navigation bar with buttons: 'Knowledgebase', 'News', 'Downloads', 'Ask a Question', and an ellipsis. A breadcrumb trail shows 'KBPublisher / KB Home / My Account'. Below this is another navigation bar with links: 'Home', 'Profile' (which is highlighted), 'Security', 'Notifications', 'Favorites', 'Must Read', and 'Subscriptions'. The main content area is titled 'Update Profile' and contains a form with the following fields: 'First Name' (with a red asterisk and value 'John'), 'Last Name' (with a red asterisk and value 'Smith'), 'Middle Name' (empty), 'Phone' (empty), 'Email' (with a red asterisk and value 'mymail@mail.com'), and 'Username' (with a red asterisk and value 'My user name'). At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page says 'Powered by KBPublisher (Knowledge base software)' and includes an RSS icon.

To edit your account details, perform these steps:

- Open the **Profile** section.
- Click the **Update profile** button.
- Make necessary changes.
- Click **Save**.

Account Security

In the **Security** section of your personal profile page, you can set up multi-factor authentication, change your current password, and delete your account.



Setting up Multi-Factor Authentication

Multi-factor authentication (MFA) is an authentication method that helps protect access to your data by adding an extra layer of security. To use MFA, you must have an Authenticator app on your smartphone. The app helps securely verify your identity so only you can access your data in the knowledgebase.

In the **Multi-Factor Authentication** area, you can do the following:

- **Enable** or **disable** MFA.
- **Reset** MFA if you want to change the currently used Authenticator app.

To enable MFA, perform these steps:

- In the **Multi-Factor Authentication** area, click the **Enable** button. In the window that appears, you will see the instruction how to pair your device.
- Follow the instructions, and finally click the **Pair Device** button.
- Make a note of the scratch code so you can use it if you cannot access your Authenticator app.

Now each time you log in to the knowledgebase, type a new code from your mobile Authenticator app.

Changing Password

To change your current password, perform these steps:

- In the **Password** area, click the **Change Password** button.
- On the page that appears, type **Your Current Password** if required.
- In the **New Password** field, type your new password.
To learn about password policy rules, click the question icon to the right of the field. You can also generate a random password by clicking the corresponding element.
- In the **Verify Password** field, retype the password.
- Click **Save** to apply the new password.

Depending on your knowledgebase settings, after you change your password, you may have to log in again by using your new

password.

Deleting Account

To delete your account, perform these steps:

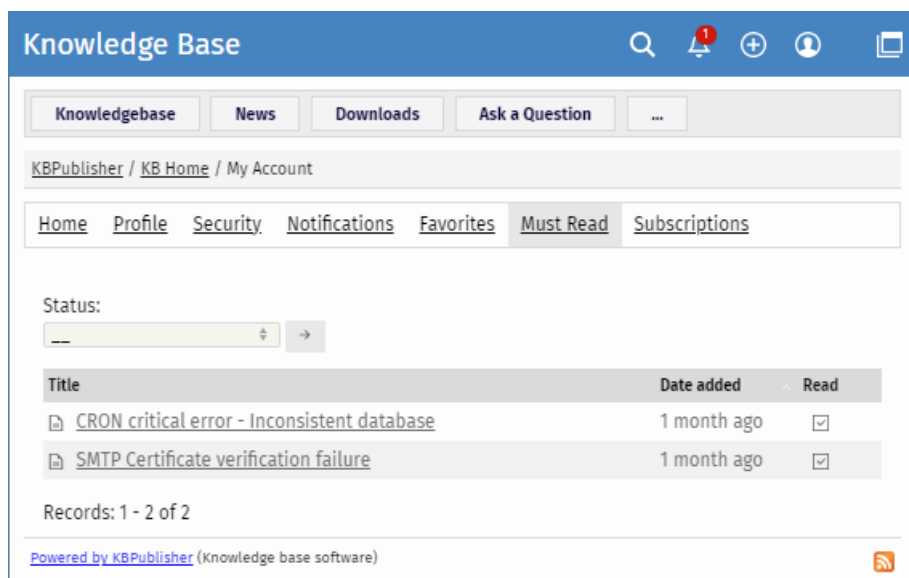
- In the **Delete Account** area, click the **Delete Account** button.
- In the window that appears, you can write why you are deleting your account if you want to.
- Depending on your knowledgebase settings, perform one of the following actions:
 - Click the **Delete Account** button to delete your account immediately.
 - Click the **Send Request** button to send your request to Administrator. In this case, only Administrator can delete your account. Your account will be available until Administrator confirms and deletes it.

After your account is deleted, all data in the account will be also permanently deleted.



Viewing Must Read Articles

The **Must Read** section contains articles that your Administrator set as must-read.

When you log in to the knowledgebase, you may receive a notification about articles that you must read. You can read them immediately, or read later. If you decide to read them later, you can always find the articles in the **Must Read** section.



The screenshot shows the 'Knowledge Base' interface. At the top is a blue header with the title 'Knowledge Base' and icons for search, notifications (with a red '1'), add, user profile, and a window icon. Below the header is a navigation bar with buttons: 'Knowledgebase', 'News', 'Downloads', 'Ask a Question', and '...'. Underneath is a breadcrumb trail: 'KBPublisher / KB Home / My Account'. A secondary navigation bar contains links: 'Home', 'Profile', 'Security', 'Notifications', 'Favorites', 'Must Read' (which is highlighted), and 'Subscriptions'. Below this is a 'Status:' filter section with a dropdown menu and a search button. The main content area displays a table of 'Must Read' articles. The table has three columns: 'Title', 'Date added', and 'Read'. There are two rows of data, both showing articles added '1 month ago' and marked as 'Read' with a checked box. The first article title is 'CRON critical error - Inconsistent database' and the second is 'SMTP Certificate verification failure'. Below the table, it says 'Records: 1 - 2 of 2'. At the bottom left, it says 'Powered by KBPublisher (Knowledge base software)' and at the bottom right is an RSS feed icon.

Title	Date added	Read
 CRON critical error - Inconsistent database	1 month ago	<input checked="" type="checkbox"/>
 SMTP Certificate verification failure	1 month ago	<input checked="" type="checkbox"/>

Here you can filter articles by their status, or sort by date when they were set as must-read. To sort by date, click the name of the **Date added** column.

The **Read** column shows if you have already confirmed that you read the article or not.

Managing Notifications

On your personal profile page, in the **Notifications** section, you can view a list of all notifications that you have received recently. They serve as reminders that you have important information that requires your attention.

If you have new unread notifications, a badge with number appears on the icon in the top right corner. If you click the icon and select **View all**, you will be also taken to the **Notifications** section.

Knowledge Base

KBPublisher / KB Home / My Account

Home Profile Security **Notifications** Favorites Must Read Subscriptions

Date: Status: Search:

<input type="checkbox"/> Date	<input type="checkbox"/> Title	
<input type="checkbox"/> 4/24/23 12:01 AM	A KB record requires your attention	...
<input type="checkbox"/> 4/18/23 12:01 AM	A KB record requires your attention	...
<input type="checkbox"/> 4/14/23 10:00 AM	A KB record requires your attention	...

Records: 1 - 3 of 3

Powered by KBPublisher (Knowledge base software)

Here you can filter notifications by their date and status. To find a notification, type key words in the **Search** field, and then click [→]. To sort notifications by their date, click the name of the **Date** column. Notifications will be sorted in the ascending or descending order.

You can do the following actions with one or multiple notifications:

- **View** in a separate window.
- **Mark as read** or **unread**. When you mark notifications as unread, a badge with number appears in the top right corner.
- **Delete** notifications from the list.

Managing Favorites

In the **Favorites** section of your personal profile page, you can read articles and files that you saved to Favorites in Public area.

The screenshot shows the 'Knowledge Base' interface. At the top, there's a navigation bar with 'Knowledgebase', 'News', 'Downloads', 'Ask a Question', and a search icon. Below this is a breadcrumb trail: 'KBPublisher / KB Home / My Account'. The main navigation menu includes 'Home', 'Profile', 'Security', 'Notifications', 'Favorites' (which is highlighted), 'Must Read', and 'Subscriptions'. Under the 'Favorites' section, there are filters for 'Type:', 'Email subscribed:', and a 'Search:' field with a search button. Below the filters is a table with columns: 'Title', 'Date added', and 'Email subscribed'. The table lists six items, all dated '1 month ago'. Each item has a checkbox on the left and a three-dot menu on the right. The items are: 'The article comments screen explained', 'Add New File Category', 'The News Input Screen Explained', 'The Export to PDF and HTML Screens Explained', 'Articles being edited by another user', and 'SMTP Certificate verification failure'. At the bottom of the table, it says 'Records: 1 - 6 of 6'. The footer mentions 'Powered by KBPublisher (Knowledge base software)' and has a small RSS icon.

<input type="checkbox"/> Title	Date added	Email subscribed
<input type="checkbox"/> The article comments screen explained	1 month ago	• ...
<input type="checkbox"/> Add New File Category	1 month ago	• ...
<input type="checkbox"/> The News Input Screen Explained	1 month ago	• ...
<input type="checkbox"/> The Export to PDF and HTML Screens Explained	1 month ago	• ...
<input type="checkbox"/> Articles being edited by another user	1 month ago	• ...
<input type="checkbox"/> SMTP Certificate verification failure	1 month ago	• ...

In the Favorites section, you can filter articles by their type and subscription. To find an article, type key words in the Search field, and then click [→].

Favorites also allows you do the following actions with individual or multiple articles/files:

- Unsubscribe from saved articles and files.
- Subscribe to articles and files and receive email notifications when they are updated.
- Remove articles and files from Favorites list. After you remove an article or file, subscription to the article or file is automatically deactivated.

Add an article to Favorites

To save an article to Favorites list in Public area, open the article page and in the right float panel, click **Save and Subscribe**:

The screenshot shows the 'Delete news item' page. At the top, there's a breadcrumb trail: 'KBPublisher / KB Home / User Manual v7.0 / News / Delete news item'. The main heading is 'Delete news item' with a three-dot menu to its right. Below the heading, it says 'Article ID: 245' and 'Last updated: 11/16/13'. The page is divided into two sections: 'To delete a single news item:' and 'To delete one or more news items:'. Each section has a list of steps. On the right side of the page, there's a vertical stack of social media sharing icons: Facebook, Twitter, a blue bookmark icon (which is highlighted with a 'Save & Subscribe' tooltip), Print, Email, and a three-dot menu. The tooltip is a white box with a black border and a pointer to the bookmark icon.

Delete news item ...

Article ID: 245
Last updated: 11/16/13

To delete a single news item:

- Choose **News** menu
- Click on the **News** tab
- Click **Delete** from the options dropdown menu

To delete one or more news items:

- Choose **News** menu
- Click on the **News** tab
- Check the Actions with selected check box to the left of each article you wish to delete
- Choose **Delete** from the **Actions with selected** box at the bottom of the screen
- Click **OK**
- **OK** again to confirm that you really do want to delete these articles.

Add a file to Favorites

To save a file to Favorites list in Public area, click the **Downloads** tab, browse for a file, and then click **Save** in the file details box:

[KB Home](#) / Downloads

Recent files	Most downloaded
ShortName.png ⬇ 09 Feb, 2019 48 kb Downloads: 1 Save	updates.PNG ⬇ 14 Sep, 2016 6 kb Downloads: 110 Remove
Update.png ⬇ 09 Feb, 2019 39 kb Downloads: 1 Save	249509332.jpg ⬇ 05 Dec, 2016 73 kb Downloads: 103 Remove

The **Save** option changes to **Remove**. The article or file will be added to your Favorites list and subscription will be automatically activated. From now until you unsubscribe you will receive notification whenever this article or file is updated.

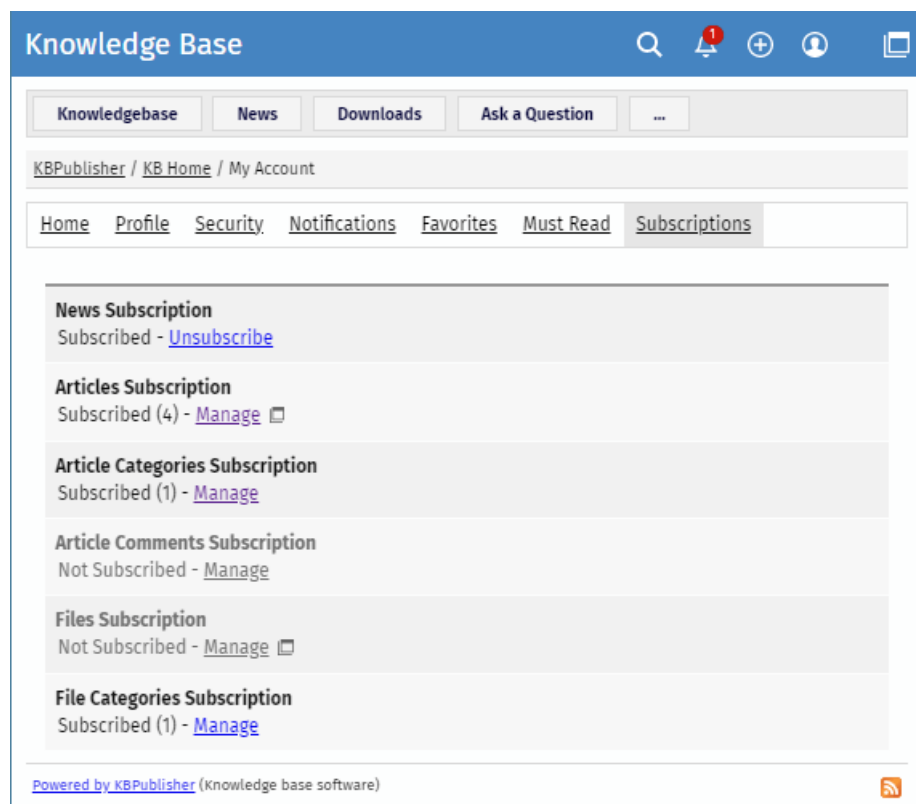
Managing Subscriptions

Subscriptions allow you to be notified when:

- A single article is updated.
- Any article in the specified category is updated, or when new articles are added to the category.
- A single file is updated.
- Any file in the specified category is updated, or when new files are added to the category.
- News is added or updated.
- A comment has been added to an article or file.

When you set up a subscription for a specified item or category, then KBPublisher sends you an email when that file or category is updated.

You can view and manage all your subscriptions in the **Subscriptions** section:



Subscribing to and Unsubscribing from News

To subscribe to or unsubscribe from news under **My Account**, perform these steps:

- In **My account**, click the **Subscriptions** section.
- In the **News Subscription** area, click **Subscribe** or **Unsubscribe**.

Subscribing to and Unsubscribing from Articles

There are two ways to subscribe to or unsubscribe from articles.

To subscribe to or unsubscribe from a single article in Public area, perform these steps:

- Open the article page.
- In the right float panel, click **Save and Subscribe** or **Remove**:

KBPublisher / KB Home / User Manual v7.0 / News / Delete news item

Delete news item

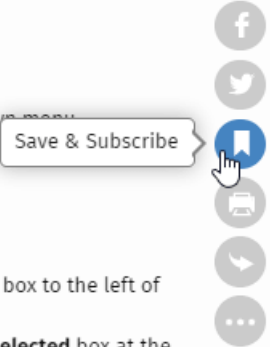
Article ID: 245
Last updated: 11/16/13

To delete a single news item:

- Choose **News** menu
- Click on the **News** tab
- Click **Delete** from the options dropdown menu

To delete one or more news items:

- Choose **News** menu
- Click on the **News** tab
- Check the Actions with selected check box to the left of each article you wish to delete
- Choose **Delete** from the **Actions with selected** box at the bottom of the screen
- Click **OK**
- **OK** again to confirm that you really do want to delete these articles.



To unsubscribe from a single article under **My Account**, perform these steps:

- In **My account**, click the **Subscriptions** section.
- In the **Article Subscriptions** area, click **Manage**.
- In the opened list, find an article that you wish to unsubscribe from. Click the [...] icon and select **Unsubscribe email**.

Subscribing to and Unsubscribing from Files

There are two ways to subscribe to or unsubscribe from files.

To subscribe to or unsubscribe from a single file in Public area, perform these steps:

- In the top left corner click **Downloads** and find a desired file.
- In the file details box, click **Save** or **Remove**.

KB Home / Downloads

Recent files	Most downloaded
ShortName.png ⬇ 09 Feb, 2019 48 kb Downloads: 1 Save	updates.PNG ⬇ 14 Sep, 2016 6 kb Downloads: 110 Remove
Update.png ⬇ 09 Feb, 2019 39 kb Downloads: 1 Save	249509332.jpg ⬇ 05 Dec, 2016 73 kb Downloads: 103 Remove

To unsubscribe from a single file under **My Account**, perform these steps:

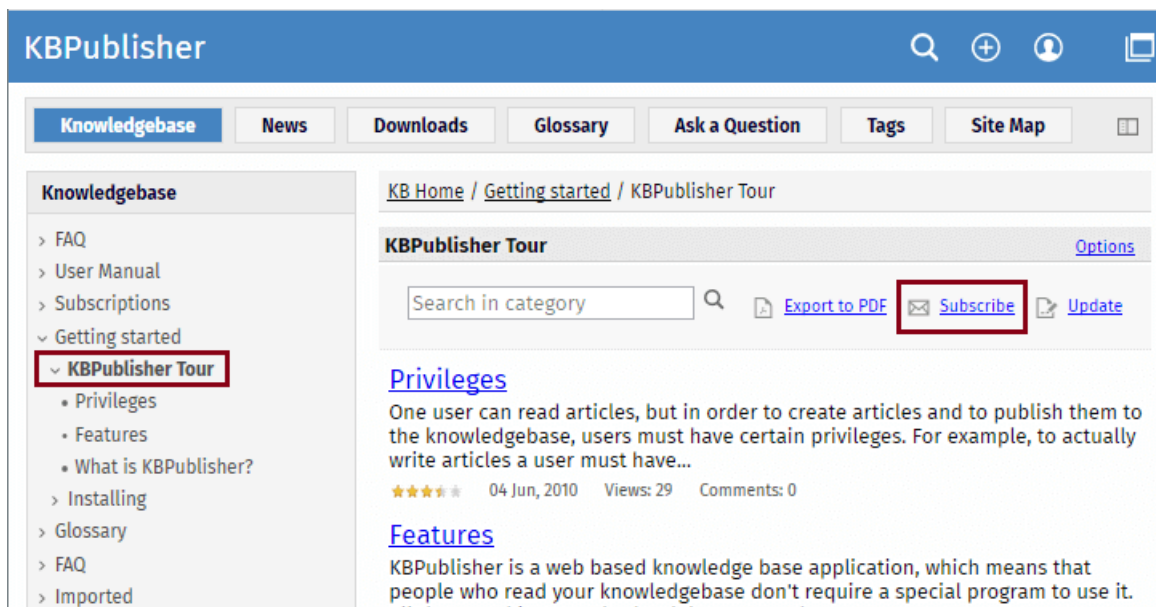
- In **My account**, click the **Subscriptions** section.
- In the **Files Subscriptions** area, click **Manage**.
- In the opened list, find a file that you wish to unsubscribe from. Click the [...] icon and select **Unsubscribe email**.

Subscribing to and Unsubscribing from All Articles/Files in Category

There are two ways to subscribe to or unsubscribe from all articles in a category.

To subscribe to all articles in a category or unsubscribe from them in Public area, follow these steps:

- In the category tree, select a desired category.
- Click **Options** in the top right corner. A panel with additional actions appears.
- Click **Subscribe** or **Unsubscribe**.



To subscribe to all articles/files in a category or unsubscribe from them under **My Account**, perform these steps:

- In **My account**, click the **Subscriptions** section.
- In the **Article Categories Subscription** or **File Categories Subscription** area, click **Manage**.
- Perform one of the following actions:
 - To subscribe, click the [+] icon. In the list, select desired categories, and then click **OK**.
 - To unsubscribe, in the list, find an article/file that you wish to unsubscribe from. Click the [...] icon and select **Unsubscribe**.

Subscribing to and Unsubscribing from Article Comments

When you post your comment to an article, you can subscribe to its new comments by selecting the check box below.

To unsubscribe from comments under **My Account**, perform these steps:

- In **My account**, click the **Subscriptions** section.
- In the **Article Comments Subscription** area, click **Manage**.
- In the opened list, find a desired article. Click the [...] icon and select **Unsubscribe**.

How to Change Your Password in KBPublisher

To change your password:

- Log in to the knowledgebase
- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen
- Click **Security**
- In the **Password** area, click the **Change Password** button.
- On the page that appears, type **Your Current Password** if required.
- In the **New Password** field, type your new password.
To learn about password policy rules, click the question icon to the right of the field. You can also generate a random password by clicking the corresponding element.
- In the **Verify Password** field, retype the password.
- Click **Save** to apply the new password.

Depending on your knowledgebase settings, after you change your password, you may have to log in again by using your new password.

How to Display More Articles in Your Knowledge Base

Ten articles are listed on each screen by default is 10, and you have to click more to see the next ten, and so on. The administrator can change this or everyone.

You can also personalize it for yourself, and display 20 or 40 records at a time instead:

- Click on **Admin Area** if you are in the public view
- Click on **My Account**, which is in the top right-hand corner of the knowledgebase screen beneath your login details
- Click on the **Settings** tab
- Choose 10, 20 or 40 records from the drop-down list for **Number of records per page**
- Click **Save**.

This functionality works in version 3.5 and above

Change the order articles and files are displayed in

By default, articles and files in Admin Area are displayed in ascending date updated order. That is, the last article or file updated is at the top of the list, and the first one updated is at the bottom.

Sometimes you want to see the list differently. You can order by date added (newest date first), date added (oldest date first), date modified (newest date first), date modified (oldest date first) and in alphabetical order.

- Click on **Admin Area** if you are in the public area
- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen, beneath your login details
- Click on the **Settings** tab
- To change the order that articles are sorted in, choose an appropriate order in **Sort Articles By**
- To change the order that files are sorted in, choose an appropriate order in **Sort Files By**
- Click **Save**.

This functionality works in version 3.5 and above

