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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 'Add new' user form in KBPublisher. The form is titled 'Add new' and contains 14 numbered fields:

- * First Name
- * Last Name
- Middle Name
- * Email
- Phone
- Company
- Role
- * Username (Smith@mail.com)
- * Password
- * Verify Password
- User Notes
- Private Admin Notes
- Subscribe (News Subscription, Articles Subscription, Files Subscription)
- Status (Active)
- Notify user (checkbox)

Buttons: Save, Cancel

- First Name, Last Name and Middle Name** make up the user's name. First and last name are compulsory, middle name is not.
- 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.
- Phone** is the user's contact telephone number.
- 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.
- 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
- 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:

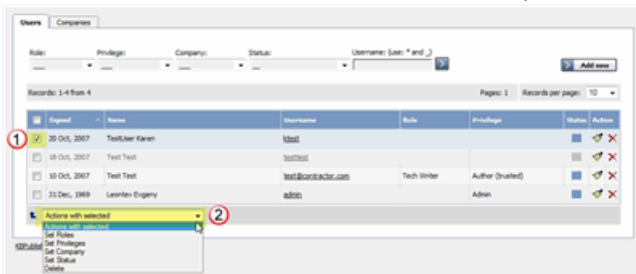
- If you have a number of users to add from another database, say, you may want to [import users](#) instead of adding them
- Or you may choose to [allow users to register](#), which effectively allows them to create their own user.

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.

Delete user

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.

KBPublisher

Users Companies Roles Privileges

Role: _____ Privilege: _____ Company: _____ Status: _____ Search: _____

Records: 1 - 10 of 17 Pages: 1 of 2 Records per page: 10

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

Actions with selected

- Actions with selected
- Set Roles
- Set Privileges
- Set Company
- Set Subscription
- Set Status
- Delete

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 five 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	
imported_user_id	int(10) unsigned	optional	
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 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

User Activities

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

Users

Users Companies Roles Privileges

[177], Ivanov, Ivan

Edit Details **Activities** API Settings Change Password More ▾ ← Back

Entry: _____ Action: _____ Period: Custom per _____ Entry ID: _____ User IP: _____

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

User privileges

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:

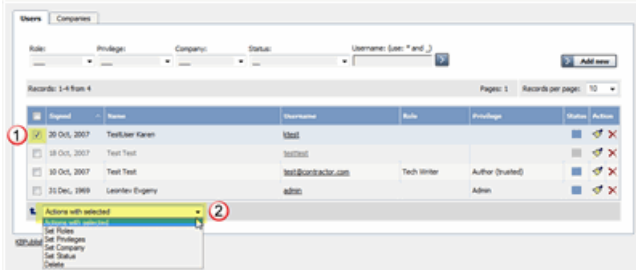
- Add a **description** to explain why this group has been set up and how it should be used
- Prevent users in this group from logging on by making the group **inactive**.

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

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

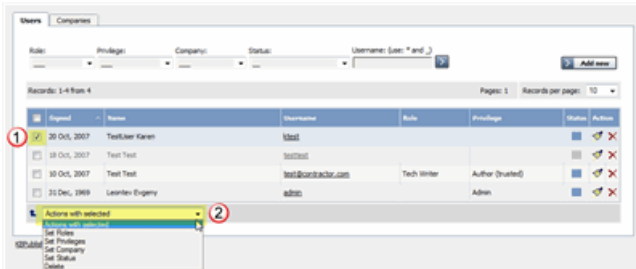
- Add a **description** to explain why this role has been set up and how it should be used

Change user role

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.

Set Default User Roles

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

How do I change my password?

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 "Change Password"
- Type in your **Your Current Password** if required
- Type your new password into the **New Password** field
- Retype the password in the **Verify Password** field
- Click OK.

How do I change my screen width?

The screen width is the width of the box that displays the knowledgebase, including any menus. The width of the display is set up by the administrator but some people have narrower screens and find that they have to keep scrolling to the right to read articles. Or they may have wide screens and want the display to cover more of the screen.

You can personalize the width as follows:

- 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, underneath your login details
- Click on the **Settings** tab
- Change the **Box Width** to the width you want KBPublisher displayed. You can use a set width, in pixels (px), or use a percentage (e.g. 100%).
The default box width is the width that the administrator has set up for the database.
- Click **Save**.

This functionality works in version 3.5 and above

How do I display more articles on a page?

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

Subscriptions

Subscriptions allow you to be notified when:

- A single article is changed
- Any article in a specified category is changed, or when new articles are added to the category
- A single file is changed
- Any file in a specified category is changed, or when new files are added to the category
- News is added or changed
- 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 changed.

You can see what you have subscribed to on the **Subscriptions** tab under **My Account**.

KBPublisher

Knowledgebase News Downloads Glossary Ask a Question ...

KB Home / My Account / Subscriptions

Home Profile Favorites Subscriptions

News Subscription
Not Subscribed - [Subscribe](#)

Articles Subscription
Subscribed (7) - [Manage](#)

Article Categories Subscription
Not Subscribed - [Manage](#)

Article Comments Subscription
Subscribed (1) - [Manage](#)

Files Subscription
Subscribed (8) - [Manage](#)

File Categories Subscription
Subscribed (2) - [Manage](#)

Powered by [KBPublisher](#) (Knowledge base software)

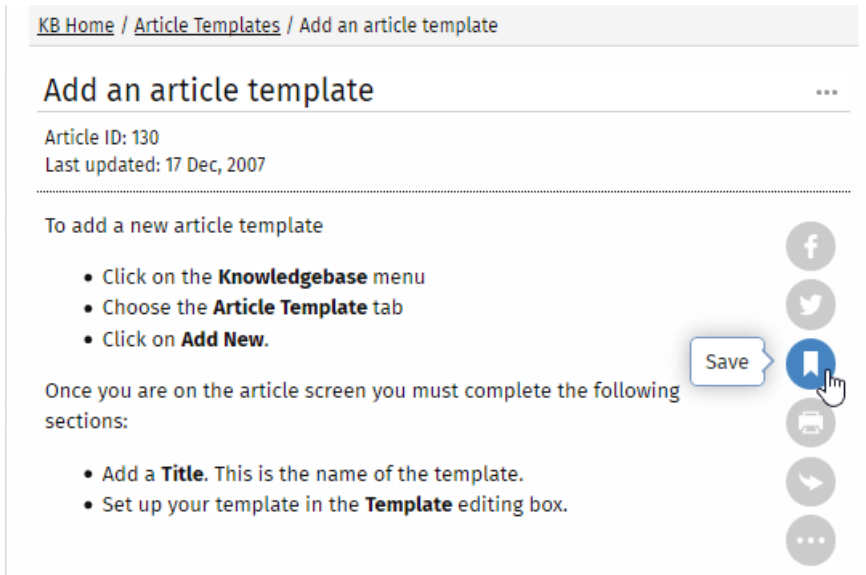
This functionality works in version 3.5 and above

Subscribe to an article

Subscribing to an article means that you receive email notification of any changes to that article.

To subscribe to a single article

- Open the article to read it



KB Home / Article Templates / Add an article template

Add an article template

Article ID: 130
Last updated: 17 Dec, 2007

To add a new article template

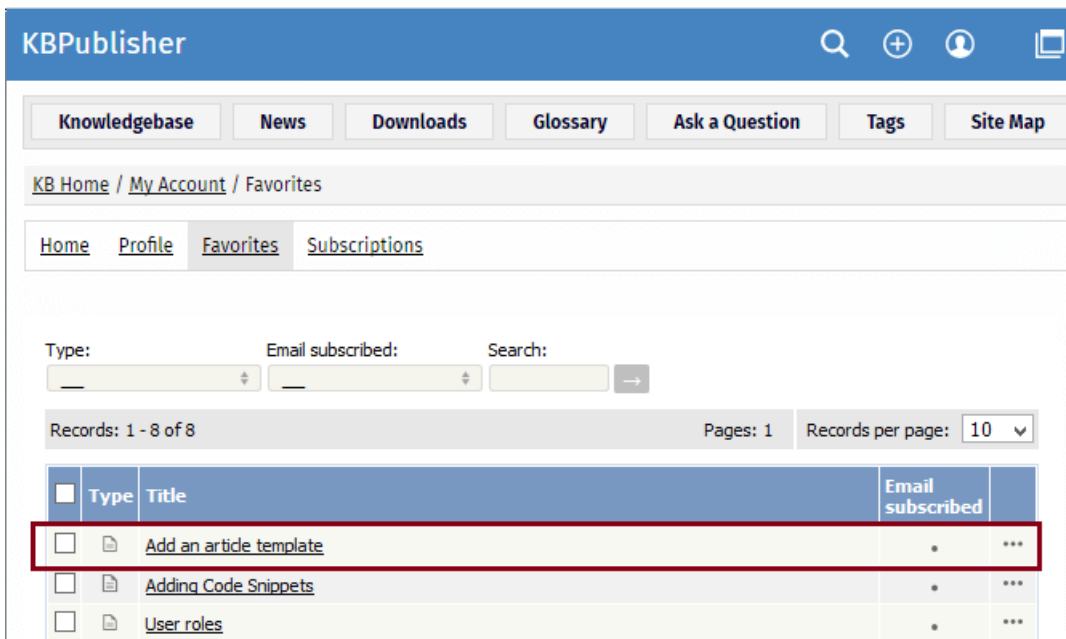
- Click on the **Knowledgebase** menu
- Choose the **Article Template** tab
- Click on **Add New**.

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

- Add a **Title**. This is the name of the template.
- Set up your template in the **Template** editing box.

Save

- In the right float panel, click **Save**. The article will be added to your Favorite list and subscription will be automatically activated. From now until you unsubscribe you will receive notification whenever this article is edited.



KBPublisher

Knowledgebase News Downloads Glossary Ask a Question Tags Site Map

KB Home / My Account / Favorites

Home Profile Favorites Subscriptions

Type: Email subscribed: Search:

Records: 1 - 8 of 8 Pages: 1 Records per page: 10

<input type="checkbox"/>	Type	Title	Email subscribed	
<input type="checkbox"/>	📄	Add an article template	•	⋮
<input type="checkbox"/>	📄	Adding Code Snippets	•	⋮
<input type="checkbox"/>	📄	User roles	•	⋮

To subscribe to all articles in a category

- In the category tree, select a category you wish to subscribe to.

The screenshot shows the KBPublisher website interface. At the top, there is a blue header with the 'KBPublisher' logo and navigation icons. Below the header is a navigation bar with tabs for 'Knowledgebase', 'News', 'Downloads', 'Glossary', 'Ask a Question', 'Tags', and 'Site Map'. The 'Knowledgebase' tab is active. On the left side, there is a 'Knowledgebase' sidebar with a tree view. The 'KBPublisher Tour' category is expanded and highlighted with a red box. The main content area shows the 'KBPublisher Tour' article page. The article title is 'KBPublisher Tour' and it has an 'Options' link in the top right corner. Below the title is a search box and three action buttons: 'Export to PDF', 'Subscribe' (highlighted with a red box), and 'Update'. The article content includes a section titled 'Privileges' and another titled 'Features'. The 'Features' section starts with the text: 'KBPublisher is a web based knowledge base application, which means that people who read your knowledgebase don't require a special program to use it.'

- Click **Options** in the top right-hand corner. A panel with additional actions will appear.
- Click **Subscribe**.

You can see which articles and categories you have subscribed to in the [Subscriptions](#) tab under **My Account**.

This functionality works in version 3.5 and above

Unsubscribe from an article

To unsubscribe direct from the article

- Click on the article to read it.
- Click on **Remove** in the right float panel.

To unsubscribe via the subscriptions list

You can unsubscribe from single articles this way, and whole categories

- Click on **My account**.
- Click on the **Subscriptions** tab.
- Select a required section and click **Manage**.
- When selecting **Articles Subscription** or **Article Categories Subscription**, in the opened list find an article or category you wish to unsubscribe from. Click the [...] icon and in the opened menu select an **Unsubscribe** command.
- Click **OK** to the message that asks if you're sure.

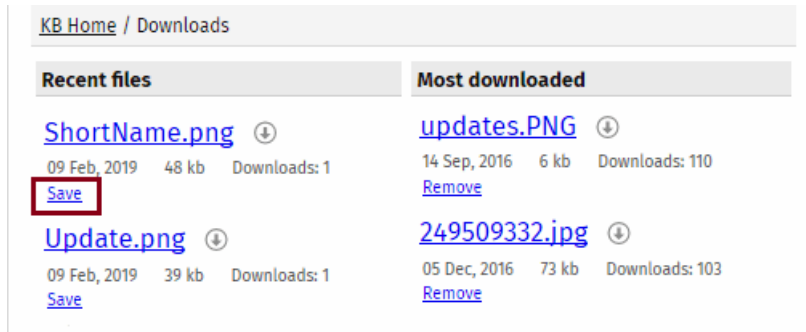
This functionality works in version 3.5 and above

Subscribe to a file

Subscribing to a file means that you receive email notification of any changes to that file.

To subscribe to a single file

- Click on the **Downloads** tab to bring up the list of files
- Browse for the file that you wish to subscribe to
- Click on **Save** in the file details box



The screenshot shows a web interface for file management. At the top, there is a breadcrumb trail: [KB Home](#) / [Downloads](#). Below this, there are two columns: **Recent files** and **Most downloaded**. Each column lists files with their names, dates, sizes, and download counts. In the 'Recent files' column, the file 'ShortName.png' (48 kb, 1 download) has a 'Save' button highlighted with a red box. In the 'Most downloaded' column, the file 'updates.PNG' (6 kb, 110 downloads) has a 'Remove' button. Below it, '249509332.jpg' (73 kb, 103 downloads) also has a 'Remove' button. Each file name is a blue link with a download icon to its right.

The **Save** option changes to **Remove**, and from now until you unsubscribe you will receive notification whenever this file is changed.

To subscribe to all files in a category

- Click on **My account**, which is in the top right-hand corner of the knowledgebase screen
- Click on the **Subscriptions** tab
- Find a **File Categories Subscription** section and click **Manage**
- Click on **Add New**
- Select a category you wish to subscribe to from the list. Note, there is also an option to select all categories, if you wish
- Click **OK** to save your subscription.

You can see which files you have subscribed to in the [Subscriptions](#) tab under **My Account**.

This functionality works in version 3.5 and above

Unsubscribe from a file

To unsubscribe direct from the file

- Click on the Downloads tab to bring up the list of files
- Browse for the file that you wish to unsubscribe from
- Click on **Unsubscribe** in the file details box

To unsubscribe via subscriptions

You can unsubscribe from single files here, or from whole categories

- Click on **My account**
- Click on the **Subscriptions** tab
- Click on **Subscribe / Unsubscribe** next to **Files** if it's for a single file, or from **File Categories** if it's for the whole category
- Click **unsubscribe** for the file or category you wish to unsubscribe from
- Click **OK** to the message that asks if you're sure

This functionality works in version 3.5 and above

Subscribe to news

To be notified when news items are added to the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Subscribe**

You will be notified daily of changes to news items.

This functionality works in version 3.5 and above

Unsubscribe from news

To no longer receive notifications about updates to the news area of the knowledgebase:

- Click on **My Account**
- Click on the **Subscriptions** tab
- Choose **Subscribe/Unsubscribe** for **News**. This brings up a subscribe button.
- Click **Unsubscribe**

This functionality works in version 3.5 and above

