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# Articles

Information about Articles, how they work and how to add and update them.

## How to Use the Article Input Screen

The article screen is divided into two tabs. The **Main** tab, which is what you use to create the article, and the **Advanced** tab, where you set external links, the order of the article inside a category and whether or not the article is published. The **Advanced** tab also allows you to schedule articles for publication.

### The Main tab

The screenshot shows the 'Main' tab of the KBPublisher article input screen. At the top, there are tabs for 'Main' and 'Advanced'. Below the tabs is a blue header bar with 'Edit 1'. The main content area contains several fields and a rich text editor. The fields are: ID: 82, Date posted: 05 Nov, 2007 03:02 AM by John Smith (smith@mail.com), Date updated: 29 Nov, 2010 05:08 AM by John Smith (smith@mail.com), Type: (dropdown), Category: (dropdown with suggestions), Title: Import users, Article: (dropdown), Tags: (text input), Related Articles: (+), Attachment: (+), Status: Outdated, and Revision comments: (text input). The rich text editor has a toolbar with various formatting options. The bottom of the screen has a 'Main' tab, 'Advanced' tab, and buttons for 'Save', 'Cancel', and 'Preview'.

1. Edit button  
2. ID field  
3. Date posted field  
4. Date updated field  
5. Type dropdown  
6. Category dropdown  
7. Category suggestions  
8. Title field  
9. Article dropdown  
10. Rich text editor toolbar  
11. Tags field  
12. Related Articles button  
13. Attachment button  
14. Status dropdown  
15. Revision comments field  
16. Save, Cancel, and Preview buttons

1. The blue line at the top of the screen denotes whether you are adding a new article, or editing an existing one.
2. If this is an existing article, it will have an **Article ID**. This is the record number under which the article is stored in the database. You can easily find any article if you know its ID.
3. It will also show the date the original article was created in **Date Posted**, and who created the article.
4. The **Date Updated** field shows the last time the article was updated, and who updated it.
5. **Type** has two purposes. It is used to group records for searching and it can also provide a default template for the article. It is not compulsory. If you want to remove a type you have already included, set the **Type** back to the first item in the drop-down list (\_\_\_\_).  
Articles types can be managed in *Tools -> Lists -> Article Type*.
6. **Category** controls where the article will be placed in the knowledgebase. It is, effectively, the menu or the table of contents. Note the red '\*' to the right of the word 'Category'. This means that this field is compulsory. Note also that some of the categories are red. These categories are private categories. When you select a private category, KBPublisher lists roles and restrictions beneath the category list so that you know which users can access the article.

7. You add or remove categories by clicking on the + and - buttons
8. **Title** is the heading that goes on the page, and also the link that is displayed under the category (table of contents). It, too, is compulsory.
9. The **Article** is the content that people read. Again, it's compulsory. Type your article into the edit box. Move your mouse over each of the icons in the edit toolbar to see what each one does, or you can read about each function in [edit toolbar explained](#).
10. **Templates** can be inserted into the text by choosing the template from the drop-down list and then clicking on Insert, Replace or Include template. [Using templates in articles](#) describes how templates work and how to use them.
11. **Tags** are search words. If you define a keyword here and a user then searches using that keyword, this article is displayed. Use a comma to separate each keyword.  
Some external search engines may also use this for search engine optimization.
12. You can easily cross reference other articles in your KBPublisher database by choosing **Related articles**. You can link to text within the article, or you can add a link that is displayed under the heading 'Also read' at the bottom of the page. [How do I add a link to an article](#) explains the process in more detail.
13. You can link to files in your KBPublisher database by choosing **Attachment**. Again, you can add it as a link to text within the article, or you can add the link at the bottom of the page under the heading 'Attached files'. [Attach a file to an article](#) explains this in more detail.
14. Use the **Status** to specify whether this article is published, meaning users can read it, not published, or pending (approval required).  
Articles statuses could be managed in *Tools -> Lists -> Article Status*.
15. The **Revision comments** box is only displayed once you start editing the content of the article. Use this to add comment version history information. When you look at the history, these comments will help you remember what was changed for this version.
16. The **Save** and **Cancel** buttons are standard. **Save** means save the article, **Cancel** means exit but don't save.  
**Save and continue editing** allows you to save the document but remain on the edit page to make more changes.  
**Save, do not mark as updated** option allows you to save the document but not update article updated date, this allows to skip this article from subscription for updated articles.

## The Advanced tab

Main **Advanced**

**Add new 1**

Meta Description: **2** How to import users

**3** External links:

**4** Order: **Order**

**5** Private: ☐ Unlisted  
☐ Read  
☐ Write

**6** Schedule: ☐ Yes

**7** Must Read: ☒ Yes

☐ All users  
☐ All staff users  
☒ Specified users  
 PhillipWizQR, PhillipWizQR PhillipWiz × GruzniRR, GruzniRR Gruzni × +  
☐ Users with a privilege  
☐ Users with a role

Notes

☐ Expires: 08/21/2023 ... (mm/dd/yyyy)  
☐ Force users to read the article

**8** Status: Published

Main **Advanced**

**i** Publish Cancel Preview

1. Again, the blue bar tells you whether you are editing an existing article or creating a new one.
2. The **Meta Description** is a brief summary of what is on the page. This description is often used by search engines when displaying details of a page.
3. You can add links to other web sites by adding them to the **External links** field. Type or paste the address (URL) of the page you want to link into the field. These then appear at the bottom of the article under the heading 'External Links'. You can append an optional title to each link using a pipe symbol to separate the url and title. Use an to separate links. Links must begin with http://. e.g. http://kbpublisher.com | KBPublisher
4. The categories you have selected for the article are listed in the **Order** field, along with a drop-down list of where to place the article within the category. There is one order list for each category you have chosen.
5. Checking the **Private Unlisted** option makes the article available only to users who have link to the article. Checking the **Private Read** option means that the user must log on to read the article. Checking the **Private Write** option allows you to restrict who can edit the article. Designated that an article is private brings up a list for you to choose **Access for assigned roles only**. This allows you to assign which groups of users (users in which roles) can actually read the article. If you just wish to make the article private but still want everyone to be able to read it, choose **None**.
6. You can **Schedule** articles to be published or not-published at a specified date and time. Checking the **Schedule** box brings up date, time and status fields. Fill these in to schedule that the article will change status on that date. You can specify one or two schedule dates. Schedule an item explains this in more detail.
7. **Must Read** option allows you to set up a mandatory reading requirement.

The screenshot shows a configuration panel for 'Must Read' notifications. It includes a 'Must Read' toggle set to 'Yes', a 'Reset read confirmations' link, a list of user selection options, a 'Notes' text area, an 'Expires' date picker, and a 'Force users to read the article' checkbox. Red numbers 1 through 5 are placed next to specific elements: 1 next to 'Reset read confirmations', 2 next to 'Specified users', 3 next to the 'Notes' text area, 4 next to the 'Expires' date field, and 5 next to the 'Force users to read the article' checkbox.

1. Set or unset reading requirements.  
If your update article set as "Must Read" you have an option "**Reset read confirmations**", it means all read confirmation will be reseted and assigned users should confirm it again.
2. Select **who should read** the article.  
It is very flexible, you can assign all users, all staff users (user with privilege), or user with specified role or privileges or specified users.
3. **Add notes** user will get with Must Read notification.
4. Set if reading **requirement will expire**.  
If not checked Must Read will never expire, the following rules applied:
  - Users who did not confirmed it will get notification until he confirm it.
  - All new matched user will get a Must Read notification.  
If expire date is specified:
  - Users who did not confirmed it will get notification until he confirm it or expire date ....
  - All new matched user will get a Must Read notification before expire date.
5. **Force users to read** the article.  
OFF (not checked) - On login user will be notified but it is allowed to read it later.  
ON (checked) - On login user will be notified and it is not allowed to go further until he confirm he read it. (Allowed go to Admin Area and User's Account)























## The HTML editor toolbar explained

The text editor of KBPublisher is an FCK Editor.













You can edit the text as text (wysiwyg), or if you are familiar with HTML, you can edit the source HTML.



### A summary of each command

Command	What command does
	Hides the toolbar to give you more editing space. Click again to re-display the toolbar.
 Source	Allows you to edit the HTML source of the article.
	Controls the templates. Note that this is similar functionality to the templates drop-down menu above it, but the way you insert the template is slightly different (even though the end result is the same). See <a href="#">using templates with articles</a> for more detail about this.
	Displays the page as HTML. i.e. As the users might see it.
	Maximize the editor. This gives you a larger area to type into. Click again to return to normal.
	Cut the highlighted text to the clipboard. The first time you cut or copy in an article you may be asked to allow access. Click OK.
	Copy the highlighted text to the clipboard. The first time you copy or cut in an article you may be asked to allow access. Click OK.
	Paste the text you copied. Any formatting will be included.
	Paste the text you copied as plain text. No formatting will be included. For example, if the text you copied was bold this paste will remove the bold.
	<p>Copy content from Microsoft Word.</p> <p>Documents created in Microsoft Word produce messy HTML, with lots of unnecessary tags. This paste allows you to clean up some of those tags. To use it:</p> <ul style="list-style-type: none"><li>• Copy the text from your Word document</li><li>• Click on the <b>Paste from Microsoft Word</b> icon. This brings up a pop-up box</li><li>• Use <b>&lt;Ctrl&gt;&lt;V&gt;</b> to paste the text you copied into the box</li><li>• Check <b>Ignore font face definitions</b> if you don't want the font data carried across</li><li>• Check <b>Remove Styles definitions</b> if you want to remove the Microsoft styles</li><li>• Click <b>Clean up box</b> to remove unwanted tags</li><li>• Then click <b>OK</b> to copy the text back into your KBPublisher article.</li></ul>
	Print the HTML page.
	Undo or redo.
	Find text in the article.
	Replace text in article.
	Select all.
	Remove any formatting.
	Format the text as bold, italic or underline.
	Create a numbered list.
	Select all of the text in the HTML page (usually used before copy or cut, or to apply a style or format to the whole page).
	Indent text or remove indent.
	Align the text. Alignment options are left aligned, centered, right aligned or justified.
	Insert or remove a link.



	Insert an anchor.
	Insert a picture. You can find out more about inserting images in <a href="#">add a picture to an article</a> .
	Insert a Flash animation into your document. Works similar to adding a picture.
	Insert a table. Clicking on <b>insert table</b> brings up a pop-up box that allows you to set the table properties.
	Inserts a horizontal line into the text. (The html <hr/>)
	Insert emoticon. Brings up a list of common smileys for you to choose from.
	Allows you to insert special characters such as copyright or trademark symbols, or em and en dashes.
	Inserts a page break into the text.
	Change the color of any highlighted text.
	Change the background color of any highlighted text.
	Show blocks.
	Gives information about the editor.
Style <input type="text"/>	Choose a style. This allows you to select a style from those defined in admin\tools\ckeditor_custom\ckeditorstyles.xml.
Format <input type="text"/>	Select one of the standard pre-defined styles.
Font <input type="text"/>	Select a font for your text.
Size <input type="text"/>	Select a size for your text.

The editor also allows you to use some standard control key combinations as well, in particular:

- <Ctrl><X> for cut
- <Ctrl><C> for copy
- <Ctrl><V> for paste
- <Ctrl><Z> for undo
- <Ctrl><B> for bold
- <Ctrl><I> for italic.

## Add an Article

---

If you are in the Public area, the quickest way to [add an article](#) is via the **Manage** menu in the top right of your screen:

- Click on **Manage -> Add Article Here**

If you are in the Admin area, another fast way is to use the **Shortcuts** menu at the top of your screen:

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

Or you can do it via the **Articles** tab.

- Click on the **Articles** menu
- Choose the **Articles** tab
- Click on **Add New**.

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

- Choose where you want the knowledgebase article to be displayed by [adding a Category](#) or categories
- Add a **Title**. This is the heading displayed on the knowledgebase screens and in any menus/table of contents.
- Type your article in the **Article** editing box.

The following items are optional:

- To help users search within your database, include a **Type** and **Meta Keywords**.
- To optimize web search add **Meta Keywords/Tags** and a **Meta Description**.
- To add links to other web sites, include **External links**.
- To add links to other articles in the database, include them as **Related articles**.
- To add links to files, include them as **Attachments**.
- To help users find the article, add **Tags**.
- To force users to log on to read the news item, mark it as **Private Read**.  
To restrict who can edit the news item, mark it as **Private Write**.  
To make it available only for users who has a link, mark it as **Unlisted**.
- To publish or change to not published at a future date, **Schedule** it.
- To force users to read the news item, set up the **Must Read** option.
- To say where in the list the article is placed, specify the **Order**
- Use the **Status** field to make the article available to read.

You can find out more about each of these fields and how they work in [The Article Screen Explained](#).

Once your article is complete:

- Click **Save**.

Tips:

- If you have a number of articles to add from another database, say, you may want to [import articles](#) instead of adding them.

## Update an article

---

There are two ways to get to the update article screen.

One way is to:

- Choose **Articles** menu
- Click on the **Articles** tab
- Click the Options icon under **Actions** to display the dropdown list, and then click Edit.

The other way is to

- Click on the article to view it
- Click on **Quick Edit** to update article in place or click **Edit Article** to open article for update in Admin Area

You can find out more about each of these fields and how they work in [The Article Screen Explained](#).

You can also use the [bulk update option](#) to update the categories, type, meta tags, status and description. Using this feature, you can update more than one article at a time.

## Delete an Article

---

To delete a single article:

- If you are in the Public area, click on the **Admin Area** link
- Click on the **Articles** tab
- Click **Move to Trash** from the options drop down menu.

To delete one or more articles:

- If you are in the Public area, click on the **Admin Area** link
- Click on the **Articles** tab
- Check the Actions with selected check box to the left of each article you wish to
- Choose **Move to Trash** 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 Picture to an Article

---

Graphics must be uploaded to the server before you can display them on the page. You can upload them as part of adding the image.

You can "**drag and drop**" an image to the HTML editor, it will added to cursor position of an editor.

- Add or edit the article you wish to add the picture to
- Place your cursor where you want to add the picture
- Click on the **Insert/Edit Image** icon in the **Article** edit box



- Click on **Upload**

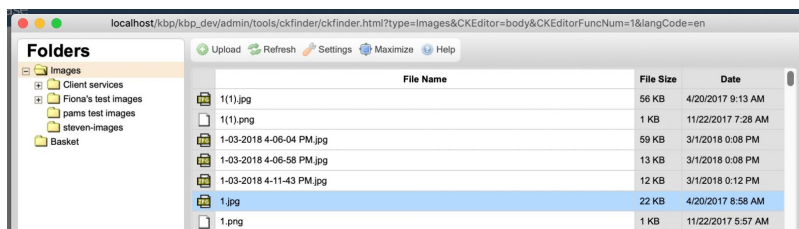
- Click **Choose File** to find the file you want to upload, click on file this brings you back to the upload screen.
- Click **Send it to the Server**.

- This takes you back to the Image Properties box with the address of the file in the **URL** line.
- This is the minimum you need to do to add the picture. You can optimize it by adding alternative text, resizing it, adding borders or margins, adding links or modifying the style.
- Click **OK** to add the picture to the article.

### If image already on server

- Click on the **Browse Server** button

- Find file on server, double click on the name of the file you want to add



- This takes you back to the Image Properties box with the address of the file in the **URL** line.
- This is the minimum you need to do to add the picture. You can optimize it by adding alternative text, resizing it, adding borders or margins, adding links or modifying the style.
- Click **OK** to add the picture to the article.

### Tip

- You can "**drag and drop**" an image to the HTML editor, it will added to cusror position of an editor.

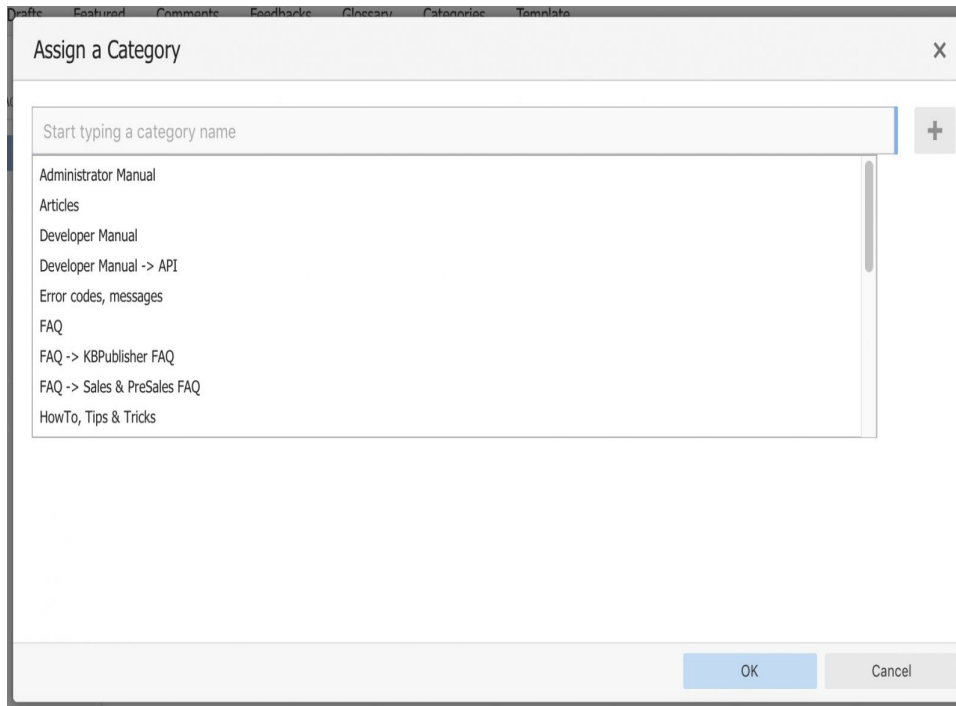
## Assign category to article

---

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

### To assign the category

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



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

On the Assign a Category screen you can also:

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

#### Tips:

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

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

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

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

### To order the category

When you exit from adding the category you return to the article screen.

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

Articles Drafts Featured Comments Feedbacks Glossary Categories Template

Main **Advanced**

**Add new**

Meta Description:

External links:

Order:

HowTo, Tips & Tricks:

AT THE END (default)

AT THE BEGINNING

✓ **AT THE END (default)**

2. AFTER: What does the red key mean beside a category, article or file?

3. AFTER: How do I insert a picture in an article?

4. AFTER: It does not work. What I should do?

5. AFTER: How to change some localization words, phrases?

6. AFTER: How does search work? What is search algorithm?

7. AFTER: Why search does not find words with less than 3,4 characters?

8. AFTER: Where is clientland user's account?

9. AFTER: How can I translate KBPublisher to another language?

10. AFTER: Where can I change look and feel?

11. AFTER: How can I enable "Search engine friendly URL"?

12. AFTER: I have installed PHP and MySQL, and I can see only blank page. What's wrong?

Show more ...

Main **Advanced**


- Select a new position from the list
- Click **OK** to save and exit from editing the article, or if you wish to continue editing the article, return to the **Main** tab,



## Link to another article (related articles)

---

### To embed a link to an article

- Add or edit the article to which you wish to add the link
- Highlight the text to be linked
- Click on the plus icon in **Related Articles** field or use the Link to article icon  in HTML editor
- In the popup find an article you wish to link to
- Click on the **Insert** icon located in the **Action** column

### To attach a link to an article (Related Articles)

- Add or edit the article to which you wish to add the link
- Click on the plus icon in **Related Articles** field
- In the popup find the article you wish to link to
- Click on the **Attach** icon located in the **Action** column

### To embed a link to a linked article

- Edit the article to which you wish to add the link
- Highlight the text to be linked to
- Under **Related Articles** click on **Link** icon, located to the right of the article title

#### Tip

- When you add a link to another page, the page that you link may also include a link back to this page under the **Also Read'** heading. In the editor, you can turn this on by checking the **cross reference** checkbox under **Related Articles**, located to the right of the article title.

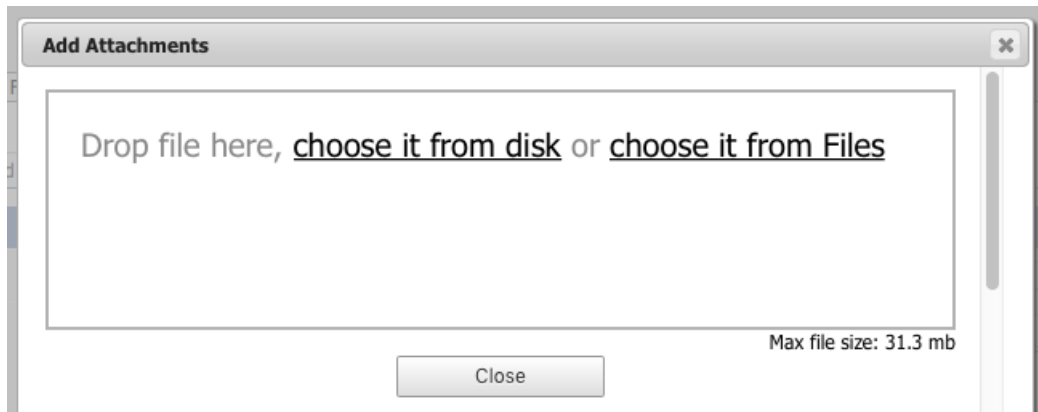
## Attach a file to an article (attachment and embedded link)

---

The New Attachment functionality allows you easily attach files and embed links to files in your article. It allows you to attach up to 5 files at once by either dragging the file, choosing a file from your local disk or selecting it from a list of already uploaded files.

### Attach a file to an article


- Add or edit the article to which you wish to attach a file
- Click the plus icon in the **Attachment** section
- The popup window **Add Attachments** will open like this:



- In this window you can drag and drop a file, choose a file from your local disk or select it from already uploaded files
- If you chose from uploaded files, find the file you want to attach in the popup window and click on the **Attach** icon

Note: When you upload new files using the **Add Attachment** window, the files will be posted to the Files module under the **Attachments** category. This category is inactive by default so files will not appear in the Downloads section of your Knowledgebase.

### Add an embedded link to a file

- Add or edit the article to which you wish to add the link
- Highlight the text to be linked
- Click on the **Link to file** icon  in HTML editor
- Find the file you want to link to in the popup window and click on the **Link** icon on the right

### Embed a link to an attached file

- Open the article which has the attached file
- Highlight the text to be linked
- Click on **Link** located to the right of the file name under **Attachments**

#### Tips

- Once you have uploaded files, you can add links to them in your articles, much the same way as you can link to other articles. This allows you to load a file once, but refer to it as many times as you wish.

## Article history

---

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

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

To turn off version control

- Click on **Settings** menu
- Choose the **Admin** tab
- Set the **maximum number of revisions** to 0

To change the maximum number of versions stored

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

To view or recognize if an article has prior versions

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

### Tip

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

---

*This functionality works in version 4.0 and above*

## Optimize Training and Knowledge Management with Article History

The **History** section shows all versions of the article or file. From here you can compare [earlier versions](#) with the current one, revert to earlier versions, delete versions, and also download a copy of the specific version.

### Articles

Articles Drafts Featured Comments Feedbacks Glossary Categories Template

[421], Manage Drafts

Edit Details **History (8)** Comments Feedbacks Preview Public View Workflow Log More ▾ ← Back

Delete all revisions

Records: 1 - 8 of 8 Pages: 1 Records per page: 50 ▾

#	Updated	Updater	Comment	
8	1 year 11 months ago	John		...
7	4 years 3 months ago			...
6	4 years 3 months ago	John	Change image	...
5	4 years 4 months ago			...
4	4 years 4 months ago			...
3	4 years 4 months ago			...
2	4 years 7 months ago		Automatically created revision!	...
1	5 years 10 months ago		reviewed and updated.	...

1. Revision number (#) is a sequentially allocated number. Each time you save the article, this number increments. In the table, the first line shows information about the current version. When comparing versions, this is the version you compare against.
2. **Updated** shows the date and time when the version was created.
3. **Updater** is a user who created or updated the article or file.
4. **Comment** shows a revision comment that an updater added when creating the version.
5. If you are in the **Articles** section, the [...] button opens a menu with the following commands:

- **Preview** opens a window in which you can preview the current article.
- **View changes** opens a page where you can compare the article against the live version side-by-side. Changes in each article revision are highlighted.

If you are in the **Files** section, the [...] button opens a menu with the following commands:

- **Open** opens the file in your web browser.
- **Download** opens the window for saving the file to your computer.
- **View changes** opens a page where you can compare the file against the live version side-by-side. Changes in each file revision are highlighted.

On the **History** page, you can also **Delete all revisions** and leave only the current version. Note that if you wish to delete a historical version, load the revision to update.

On the **View changes** page, the following actions are available:

- **Public View** displays the current live article in the public view.
- Select **Revision** number to be compared with.
- **Preview revision** in a separate window.
- **Rollback to revision** allows you to revert to a previous version. This version becomes the live one, while the formerly current version becomes another historical version.
- **Load revision to update** opens the article for editing. When you save the edited article, this version becomes the new current one.
- **Download** allows you to save the article or file (live version and a historical one) to your hard drive and compare it in your favorite compare tool. The file is saved as HTML.

---

*This functionality works in version 4.0 and above*

## Autosave

---

Articles are saved automatically at intervals.

For example, suppose you are called away from your desk in the middle of creating a new article. You don't expect to be away long, so you don't save. An hour later you come back to your desk to find your session has timed out. All that work lost.

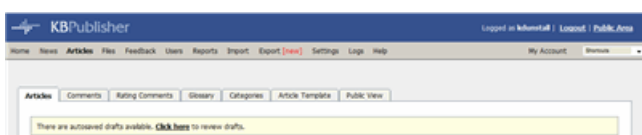
Not quite.

Provided the administrator has turned autosave on, you can get your changes up to the last time the article was autosaved.

### If you have not yet saved the article

If you were creating a new article and had not yet saved it, you can see it on the Articles tab

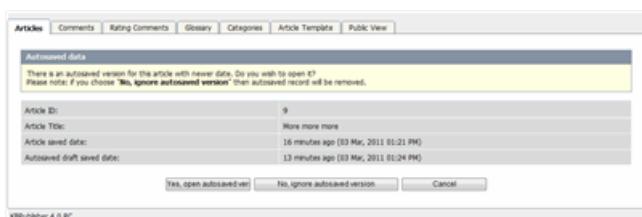
- Log on and go to the **Admin** area
- Click on the **Articles** menu
- Choose the **Articles** tab
- If there are any unsaved autosaved documents you will see a note at the top of the articles tab telling you that there are unsaved drafts.
- Click on the **click here** link to view the autosaved document(s).



- Only the author can see the autosaved document

### If you are editing an existing article

If you open an existing article for editing and for some reason the article was not saved correctly, or an error occurs on the save, then when you next open the article for editing you will see the following message:

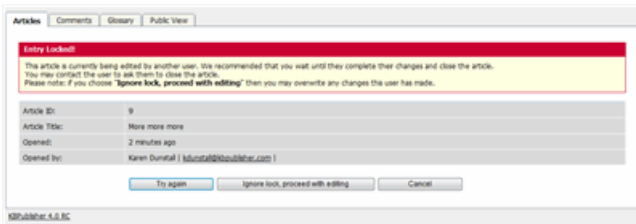


- If you want to use the auto-saved version, click on **Yes, open autosaved version**.
- If you want to revert back to the old version, click on **No, ignore autosaved version**, which opens the version without your edits
- When you **Save** the article this new version becomes the current version and the autosave history is deleted.

## Articles being edited by another user

---

When you open an article that is already being edited by another user you get a warning message telling you that someone else is working on the same document and that there are unsaved changes.



From here you can choose to:

- Wait until later to edit the article.  
If you want to do this, click **Cancel** and come back at another time.
- **Try again**, to see if the user has since closed the document.  
If the document is still being edited, you will get the same message.  
If you wish to contact the person who was editing the article and to ask them if they are finished and if so will they please save the document the **Opened By** information tells you who is currently editing the article.
- Or you can **ignore lock and proceed with editing** which overwrites anything the other user has done.  
Be aware when you do this that other author can also save over your work. The person who saves last is the one whose article becomes the final article.

## Remove scheduling

---

To remove scheduling from an article, file or news:

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

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

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

---

*This functionality works in version 3.5 and above*

## Add an article as a result of user feedback

---

Sometimes, feedback from a user generates an idea for another article. You can create this article direct from the feedback page.

- Click on the **Feedback** menu.
- Click the [...] icon in a user feedback to display the dropdown list, and then click **Create An Article**.
- This brings up a new article screen for you to start creating the new article. The text in the email is listed in the article title.
- [Create the article](#) as you normally would and save it.



## Bulk Update Articles

KBPublisher allows you to bulk update articles to:

- Move to category
- Add to category
- Set tags
- Make the articles public or private
- Schedule article publication
- Reset rating
- Set article type
- Set author
- Set custom fields
- Sort articles (available only when filter for category applied)
- Set article status
- Delete articles.

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

The screenshot shows the KBPublisher interface with the 'Articles' tab selected. A table lists articles with columns for ID, Posted, Updated, Title, Category, Rating, Views, Status, and Actions. Three articles are visible: ID 52 (System Requirements), ID 482 (How to Create Article), and ID 487 (Adding Code Snippets). A dropdown menu is open over the table, showing a list of actions for the selected items. The 'Schedule' action is highlighted in blue.

ID	Posted	Updated	Title	Category	Rating	Views	Status	Actions
52	01 Nov, 2007	06 Jul, 2019	System Requirements	Installation	★★★★★	112	Public	...
482	02 Jun, 2019	06 Jul, 2019	How to Create Article	Custom fields [2]	★★★★★	10	Public	...
487	09 Jun, 2019		Adding Code Snippets	New Category	★★★★★	6	Public	...

Actions with selected

- Actions with selected
- Move to Category
- Add to Category
- Set Tags
- Set Private
- Set Public (remove private)
- Schedule**
- Reset Rating
- Set Type
- Set Author
- Set Custom Fields
- Set Status
- Move to Trash

To update the article:

- Check one or more articles 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 articles

You can import articles in bulk.

You might want to do this, say, if you are changing over to KBPublisher from another system.

The process is:

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

### Create a file of articles to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of some or all of: **title**, **body**, **date\_posted**, **id**, **author\_id**, **updater\_id**, **meta\_keywords**, **meta\_description**, **entry\_type**, **external\_link**, **date\_updated**, **hits**, **sort\_order**, **private** and an **active** flag.

- The first three fields (title, body and date\_posted) *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 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.
- Place quotes (") around text fields such as **body**, and be sure to check that your text does not have quotes within the text. If your body, or other text field, does contain quotes, choose a different delimiter and update the **fields optionally enclosed by** field to match.
- The [TestImportArticle.csv](#) file shows a sample of what your upload file should look like. This file includes the three 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
title	text	M	
body	mediumtext	M	
date_posted	datetime	O	Format 0000-00-00 00:00:00
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
author_id	int(10)	O	If not supplied, the user currently logged in and importing the articles is set as the author.
updater_id	int(10)	O	If not supplied, the user currently logged in and importing the articles is set as the updater.
meta_keywords	text	O	Format should be the same as if you are adding the keywords in add new article.
meta_description	text	O	
entry_type	tinyint(3)	O	Type.
external_link	text	O	
date_updated	timestamp	O	Defaults to time imported to knowledgebase.
hits	int(10)	O	Defaults to 0.
active	tinyint(1)	O	Defaults to 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 articles 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**
- Click on the **Import Articles** 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 load 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 want the three mandatory fields included, plus the author ID. You need to move the *user\_ID* field from the **Available table fields** box into the **Fields in CSV file box**.
  - Click on the *user\_ID* field and hold the mouse down
  - While holding the mouse down, **drag** the *date\_registered* field over to the **Fields in csv file** 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**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

## Fix any problems

All going well, you should now have three new articles in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these three articles, 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 articles.

## Import articles

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

Note:

- Articles are imported with a category name of *Imported*. If this category does not exist it will be created as part of the upload process.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.
- Use the **bulk actions** option to change the categories, etc.

### What the Private function does

The private option:

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

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

### Using the Private function

#### Force users to log on

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

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

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

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

#### Restrict read access

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

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

#### Restrict write access

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

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

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

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

#### Restrict both read and write access

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

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

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

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

To restrict whole categories:

- Edit the article category.
- Choose **Private Read** if you wish to restrict who can read the articles in this category or force users to log on to read the articles. Choose **Private Write** if you wish to restrict who can create or edit articles in the category. Choose both **Private Read** and **Private Write** if you wish to restrict both reading and writing articles in this category.
- This brings up another option, **Access for assigned roles only**.  
By default, this is set to **None**, which means that users must log on to read articles in this category, but anyone can read them once they have logged on.
- Select which roles users must belong to in order to read or write articles in the category.

- Click **Save**.

To restrict access to a single article:

- Edit the article.
- Click on the **Advanced** tab.
- Choose **Private Read** if you wish to restrict who can read the article or wish to force users to log on to read it. Choose **Private Write** if you wish to allow everyone to read the article but only writers in a specified role to edit it. Choose both **Private Read** and **Private Write** if you wish to restrict both reading and writing the article.
- This brings up another option, **Access for assigned roles only**.  
By default, this is set to **None**, which means that the article is private, but all users can read it once they have logged on.
- Select which roles users must belong to in order to read/write the article.
- Click **Save**.

To make a single article unlisted:

- Edit the article.
- Click on the **Advanced** tab.
- Choose **Private Unlisted** if you wish to make the article available only for users who has a link to it.
- Click **Save**.
- In the **Details** section, you can copy a link for opening or downloading the article, and then give the link to a user.

## Add new status

---

Articles, files, users, rating comments and feedback comments all have default statuses. For example, there are four default article statuses: *published*, *pending*, *draft* and *not published*.

You don't have to stay with these statuses, you can create your own:

- From the **Tools** menu choose the **Lists** tab
- Click on **Articles** (or Files, or Users, or Rating Comments or Feedback)
- Choose **Add New**

You must include:

- A **title**. This is the status name. e.g. *In review*.

You can also add:

- A description, an explanation of what this status is used for.
- A **color** that is displayed with the status on article summary and list screens.
- Whether or not this status is **published**. If you check this box, then users will be able to read articles of this status. If you do not check this box, then only authors, editors, moderators and administrators can read the article.
- The **order** of this item in the status list. This defaults to *1*, which places the new status at the top of the list.
- Whether or not the status is **active**. If the status is not active, then you will not be able to assign this status to article.

Lastly

- Click **Save**.

## Add new article type

---

You can create your own article types:

- From the **Tools** menu choose the **Lists** tab
- Click on **Article Type**
- Choose **Add New**

You must include:

- A **title**. This is the article type name. e.g. *FAQ*.

You can also add:

- A **description**, an explanation of what this article type is used for.
- An **article template**. This is default text and/or formatting that is created for all articles of this type. For example, you might create an article type of system errors. For each article of this type you require three sections: *error number*, *error message* and an *explanation*, so you create a *System Error* type template with these three headings. When an author creates a new article based on *System Error*, these three headings are automatically included in the article, so all they have to do is fill in the details.
- The **order** this item is in the article type list. This defaults to *1*, which places the new type at the top of the list.
- Whether or not the type is **active**. If the type is not active, then you will not be able to choose this as a type.

Lastly

- Click **Save**.

## Featured Articles

The **Featured** tab lets you select articles you want to highlight. You can include articles in the **Featured** section of your index page, or in the featured section of a category, or both.

To access the **Featured** tab click **Articles** from the main menu bar and select **Featured** from the tabs displayed:



The list provides the ID and title of each featured article and the number of views the article has had. A star appears in the **Index Page** or **Category Page** columns, or both, to indicate where the article is featured. In the **Category Page** column a number appears beside the star to indicate how many categories feature the article.

Use the filter at the top of the form, marked in red in the image above, to show only articles that are featured on the Index page, the Company Specific page, or for a particular category. Click the > button to filter the display. Clear the fields and click > again to show all articles.

At the right of each entry is [...] button. Click it to open the **Actions** menu. From this menu:

- Select **Details** to see more about the current article. The display changes to the **Details** sub-tab of the **Articles** tab.
- Select **Edit** to set how the article is featured.
- Select **Remove** to remove the current article from the **Featured** list.

## Add an article to the Featured list

To add an article to the Featured list, click the **Add new** button. The popup window appears and shows all the articles available to add to the list.

Use the filter fields above the list and then click the > button to show only articles that match the conditions you set. Clear all fields and click > again to show all articles.

To add an article to the list, select one that does not already have a star in its **Index** or **Category** column. Click the icon to add the article to the list.

Click the icon in the **Action** column to open the edit form for the article. The form is described below.

## Edit a featured article

To adjust how an article is featured, click the Action icon for the article and select **Edit**. The Edit form appears:

Clear the check box to remove the article from the **Index Page** display.

You can feature an article on one or more category pages. To add the article to a category page, click the + button to the right of the Category Page field. Select the category you want from the list that appears. To remove the article from a category page, select the category in the Category Page field and click the - button to the right of the field. A confirmation message appears to make sure you want to remove the category.

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

## Remove a featured article

There are three ways to remove articles from the Featured list:

1. Click the **Action** icon for the article you want to remove from the list and select **Remove**.
2. Check the check box at the left of the row for each article you want to remove. Click the **Actions with selected** menu at the bottom of the display, and select **Remove**. Click **OK** to confirm that you want to remove the selected articles.

This option is useful when you need to remove several articles from the Featured list. Check the check box that appears at the top left of the list of articles to select all articles. De-select it to clear all check boxes at once.



3. Click the **Add new** button to open the list of articles as described above. Articles that are featured have a star in either or both of their **Index Page** and **Category Page** columns. Click a star to remove that article from being featured in that page or pages; you can remove the article from one feature and retain it for the other.

## Configure display options

To learn more about configuring the display of featured articles, see [The Public Area tab explained](#).  
See settings "Featured articles" and "Featured articles in a category".

## Adding Code Snippets


---

You may want to add code examples, or snippets, to your knowledgebase article to show your users how to achieve a particular effect or address a common problem. KBPublisher makes this easy by providing formatting tags to put around the example. When your readers look at the article, the example code appears, correctly formatted for the coding language you specify, and highlighted as it would appear in a code editor for that language, in a box to set it off from the rest of the text.

There are two options to add code snippet to an article.

### Option 1 - toolbar button

To add code snippets to an article by using the toolbar button:

1. Open the article for editing.
2. Place cursor where you want the code snippet to appear. (You can move the snippet later, if needed.)
3. Click the "Insert Code Snippet" icon in the editor toolbar .
4. In the Code snippet window, select a language and add your code content.
5. Click **OK**.

#### Example:

```
<?php
$value = 'something from somewhere';
setcookie("TestCookie", $value);
setcookie("TestCookie", $value, time()+3600); /* expire in 1 hour */
setcookie("TestCookie", $value, time()+3600, "/~rasmus/", "example.com", 1);
?>
```

#### Available Languages

In the Language drop down menu, the following options are available:

- Apache
- Bash
- CoffeeScript
- C++
- C#
- CSS
- Diff
- HTML
- HTTP
- INI
- Java
- JavaScript
- JSON
- Makefile
- Markdown
- Nginx
- Objective-C
- Perl
- PHP
- Python
- Ruby
- SQL
- VBScript
- XHTML
- XML

### Option 2 - [code] tag

To add code snippets to an article by using the [code] tag:

1. Open the article for editing.
2. Add opening and closing tags around your code snippet:  
[code=XXX] Add your code here. [/code]
3. Replace the XXX with the indicator from the list below for the snippet's coding language.
4. Paste your code between the opening and closing tags.
5. Preview the article to confirm it appears as you want.

#### Example:

```
<?php
$value = 'something from somewhere';
```

```
setcookie("TestCookie", $value);
setcookie("TestCookie", $value, time()+3600); /* expire in 1 hour */
setcookie("TestCookie", $value, time()+3600, "/~rasmus/", "example.com", 1);
?>
```

### Available Languages

Find your snippet's coding language on the left side of any pair. Choose **one** of the entries that appear on the right side. For AS3, for example, you could use "code=as3" or "code=actionscript3".

Code Language	Indicator
AS3	<ul style="list-style-type: none"> <li>• actionscript3</li> <li>• as3</li> </ul>
Bash	<ul style="list-style-type: none"> <li>• bash</li> <li>• shell</li> </ul>
CSharp	<ul style="list-style-type: none"> <li>• c-sharp</li> <li>• csharp</li> </ul>
ColdFusion	<ul style="list-style-type: none"> <li>• cf</li> <li>• coldfusion</li> </ul>
Cpp	<ul style="list-style-type: none"> <li>• c</li> <li>• cpp</li> </ul>
Css	<ul style="list-style-type: none"> <li>• css</li> </ul>
Delphi	<ul style="list-style-type: none"> <li>• delphi</li> <li>• pas</li> <li>• pascal</li> </ul>
Diff	<ul style="list-style-type: none"> <li>• diff</li> <li>• patch</li> </ul>
Erlang	<ul style="list-style-type: none"> <li>• erl</li> <li>• erlang</li> </ul>
Groovy	<ul style="list-style-type: none"> <li>• groovy</li> </ul>
JScript	<ul style="list-style-type: none"> <li>• javascript</li> <li>• js</li> <li>• jscript</li> </ul>
Java	<ul style="list-style-type: none"> <li>• java</li> </ul>
JavaFX	<ul style="list-style-type: none"> <li>• javafx</li> <li>• jfx</li> </ul>
Perl	<ul style="list-style-type: none"> <li>• perl</li> <li>• pl</li> </ul>
Php	<ul style="list-style-type: none"> <li>• php</li> </ul>
Plain	<ul style="list-style-type: none"> <li>• plain</li> <li>• text</li> </ul>

Code Language	Indicator
PowerShell	<ul style="list-style-type: none"> <li>• powershell</li> <li>• ps</li> </ul>
Python	<ul style="list-style-type: none"> <li>• py</li> <li>• python</li> </ul>
Ruby	<ul style="list-style-type: none"> <li>• rails</li> <li>• ror</li> <li>• ruby</li> </ul>
Scala	<ul style="list-style-type: none"> <li>• scala</li> </ul>
Sql	<ul style="list-style-type: none"> <li>• sql</li> </ul>
Vb	<ul style="list-style-type: none"> <li>• vb</li> <li>• vbnet</li> </ul>
Xml	<ul style="list-style-type: none"> <li>• html</li> <li>• xhtml</li> <li>• xml</li> <li>• xslt</li> </ul>

## Set up required reading (Must Read)

Must Read functionality allows you to set up a mandatory reading requirement. It allows you to make sure that members receive information.

When a member signs on to the KB, they are notified that there is a mandatory reading item, and they are directed to it. After reading the article or news, the staff member acknowledges the new information. The system maintains a list of who has and hasn't read the Must Read items.

## Set an item as "Must Read" (required reading)

To set a Must Read requirement for an item:

- Create a new article or news item or edit an existing one.
- If you are in an article, click the "Advanced" tab.
- Select the "Must Read" checkbox.
- Fill out Must Read block. For more detail, see the section below.
- Click **Save**.

## Set multiple items as "Must Read" (required reading)

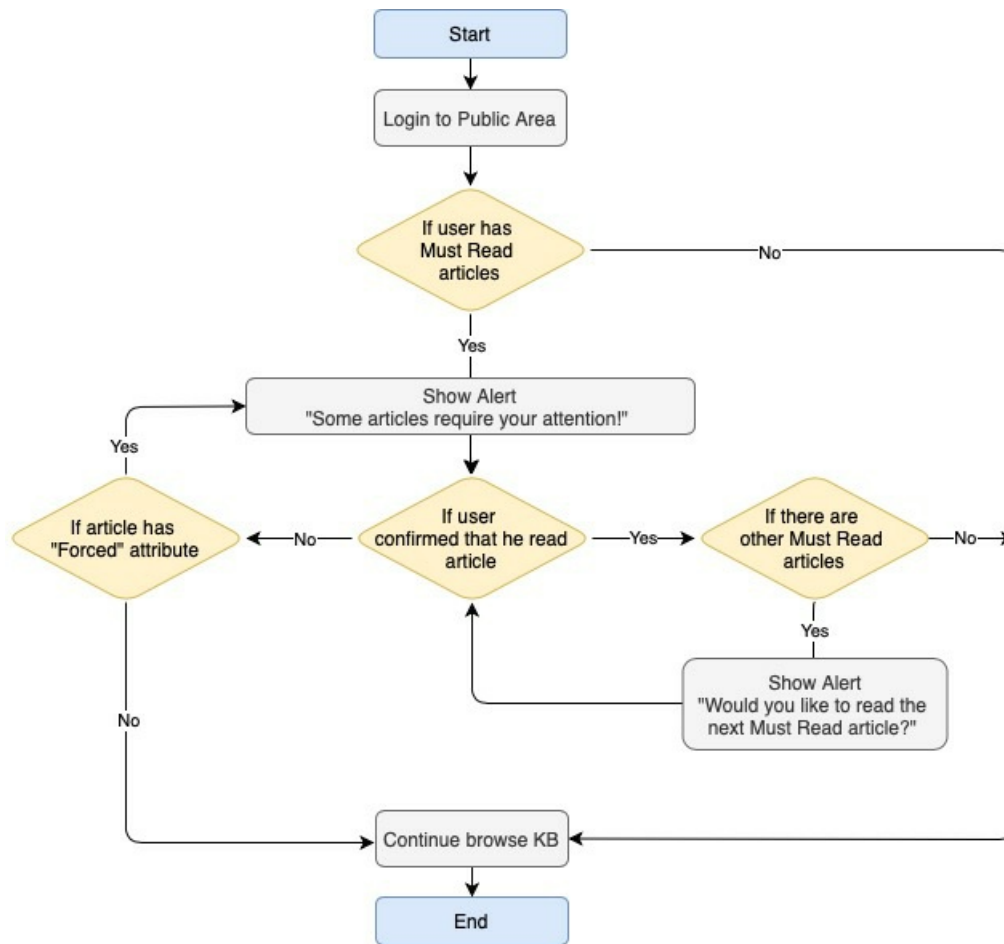
- In the articles or news listing, check required articles on the left.
- From the "Actions with selected" menu at the bottom on the page, choose **Set Must Read**.
- Fill out the Must Read block. For more detail, see the section below.
- Click **OK**.

## Must Read input block explained

The screenshot shows the 'Must Read' configuration interface. It includes a 'Must Read' section with a 'Yes' checkbox (checked) and a 'Reset read confirmations' checkbox. Below this are five radio button options for user selection: 'All users', 'All staff users' (checked), 'Specified users', 'Users with a privilege', and 'Users with a role'. There is a 'Notes' text area. At the bottom, there is an 'Expires' date field set to '06/12/2021' and a 'Force users to read the article' checkbox. Red numbers 1 through 5 are overlaid on the image to correspond with the numbered list below.

1. Set or unset reading requirements.  
If you update an article set as "Must Read" you have a "**Reset read confirmations**" option. This resets all read confirmation, which requires assigned users to confirm it again.
2. Select **who should read** the article.  
Audience assignment is very flexible: you can assign all users, all staff users (user with privilege), designate specific users, or assign to users based on specific roles or privileges.
3. **Add notes** that your users will see with the Must Read notification.
4. Set if the **reading requirement will expire**.  
If not checked, Must Read will never expire, and the following rules apply:
  - Users who did not confirm it will get a notification until they confirm it.
  - All new matched users will get a Must Read notification.  
If an expiration date is specified:
  - Users who did not confirm it will get a notification until they confirm it or the expiration date is reached.
  - All new matched users will get a Must Read notification before the expiration date.
5. **Force users to read** the article.  
OFF (not checked) - Users are notified about Must Read items at login, but are allowed to read them later.  
ON (checked) - Users are notified about Must Read items at login, and are not allowed to go further until confirming they have read all Must Read items. (*Exception*: Users are still allowed to go to the Admin Area and their own My Account area.)

## Must Read Flowchart





## Drafts

---

The **Drafts** module lets users create new articles, or modify existing published articles, without interfering with live publications. Users can create and modify drafts in a separate area until each draft is finished and ready to go live.

The Drafts module lets you require specific contributors to create drafts that must be approved before publication, rather than publishing their material directly.

To learn about creating and managing your drafts, see [Manage drafts](#).

### Essential facts about drafts

- Users with admin privileges can create, approve, reject, or delete any draft at any stage in the approval process.
- If a draft has been sent for approval, the author cannot update it until the review is complete.
- Your knowledgebase records approval decisions in a log for future reference.

### Drafts and Workflows

When a draft is ready to publish, an approval [workflow](#) can route the document or item to the **assignees**, one or more people assigned to review such material before publication.

Assignees can approve the article for publication or send it back to the author for more work. They can also provide feedback on an article. The feedback is compiled and sent to the person who initiated the workflow.

### Possible scenarios when a user adds a draft

1. **There is a matching workflow**

The author of a draft can save the draft repeatedly while working on it until the material is ready to submit. When the user submits the draft for approval, the workflow assigns it to appropriate assignees. The user has no further access to the draft until it is approved for publication or returned for further edits.

2. **There is no matching workflow and the user's privileges do not permit adding articles**

The author of a draft can save the draft repeatedly while working on it. However, the user cannot publish the draft, and there is no way to send the draft for approval.

3. **There is no matching workflow, and the user's privileges permit adding articles**

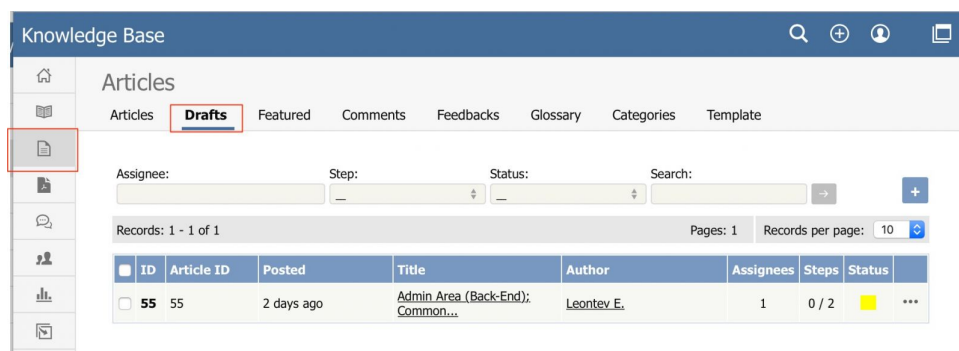
The author of a draft can save the draft repeatedly while working on it. When the draft is ready to publish, the user can publish it.

Once the draft is published it no longer appears on the list of drafts, and does appear on the list of articles.



## Manage Drafts

To manage existing drafts or create a new one, select **Articles** or **Files** from the main menu and select the **Drafts** tab:



The tab lists all existing drafts. If the list is long, use the filter fields above the list to show just the drafts of a particular status, or the drafts with a certain word in their titles.

The **Status** column shows a color for each draft to indicate its status:

- gray = in progress
- yellow = waiting for approval
- red = rejected
- green = approved
- dark gray = completed (approval not required)

Click the actions icon in the **Action** column for a draft to perform an action.

For drafts of **articles**:

- **Approve** - Appears if draft requires approval and you are an assignee (are allowed to approve or reject the draft).
- **Preview** - Display a preview of the draft to review.
- **Details** - Display details about the draft.
- **Edit** - Open the draft for editing.
- **Delete** - Delete the draft.

For drafts of **files** some extra options available:

- **Open** - Open the file in a browser if possible.
- **Download** - Download the file to a location on your computer.

Depending on your privilege level, the following **Bulk Actions** are available:

- **Set Assignee** - Change assignee. Can be applied to drafts that are in the approval queue.
- **Reset** - Move drafts to the beginning of the approval queue. Updates do not reset drafts.
- **Set Status** - Change draft status to "In Progress" or "Completed". Can be applied to drafts that are not in the approval queue.
- **Delete** - Delete the draft.

## Adding a draft

To add a draft of an article or file, click **Add new** on the relevant tab and complete the form that appears.

- For a description of the form for adding a draft of an article, see [Add an article](#).
- For a description of the form for adding a draft of a file, see [Add a file](#).

## Approve a draft

If you are an assignee for a draft in its current workflow step, you can:

- [Approve the draft](#) as-is and either publish it or move it to the next workflow step.
- Edit the draft and save your changes before [approving it](#), as in the previous option.
- Reject the draft so it returns to the author for further edits.

## Approve or Reject a Draft

A workflow may assign the draft of an article or file to you for review. You can:

- approve the draft. The draft then moves to its next assignment in the workflow, or (if it requires no further approvals) is published.
- publish the draft. The draft then become available in the Public area.
- update the draft and then approve it. The draft then moves to its next assignment in the workflow, or is published.
- reject the draft so it is returned to the author for further work.

To see the drafts assigned to you, select **Articles** or **Files** from the main menu and then select the **Drafts** tab:

The screenshot shows the KBPublisher interface. The top header is blue with the KBPublisher logo and user icons. The main content area has a tabbed interface with 'Articles' selected. Under 'Articles', the 'Drafts' tab is highlighted with a red box. Below the tabs, there are search filters for Assignee, Step, Status, and a search bar. Below these filters, it says 'Records: 1 - 4 of 4' and 'Pages: 1' with a 'Records per page: 10' dropdown. A table of draft articles is displayed with columns: ID, Article ID, Posted, Updated, Title, Author, Assignees, Steps, and Status. The status column uses colored squares to indicate the article's status: Green for 'waiting for approval', Red for 'rejected', and Yellow for 'in progress'. The table shows four draft articles, all by 'Smith J.'.

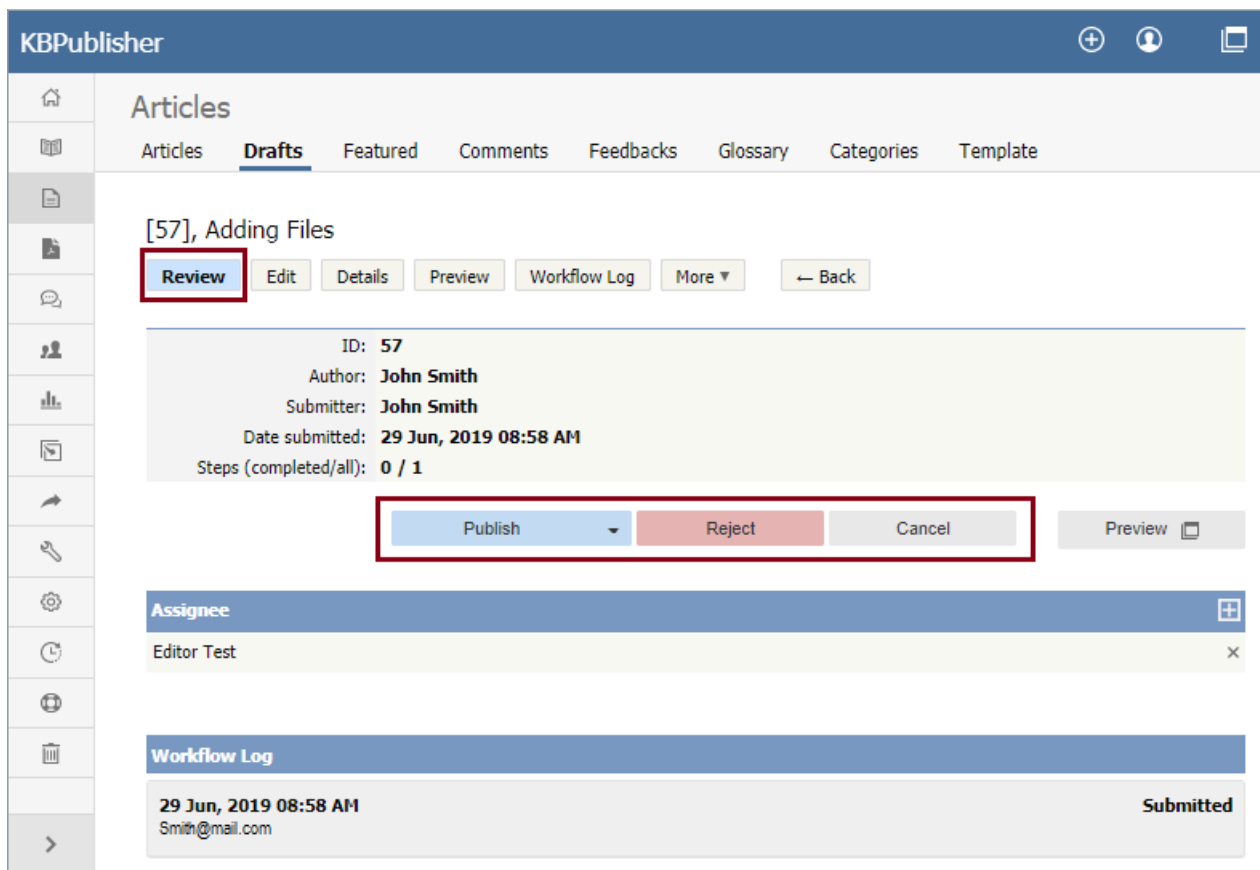
ID	Article ID	Posted	Updated	Title	Author	Assignees	Steps	Status
40	153	3 months ago	3 minutes ago	Installing	Smith J.	1	1 / 1	Green
55	--	4 days ago	3 minutes ago	Importing Users	Smith J.	1	--	Red
56	--	4 days ago	3 minutes ago	Creating Template	Smith J.	1	1 / 1	Green
57	--	3 days ago	4 minutes ago	Adding Files	Smith J.	1	0 / 1	Yellow

The colors in the article's **Status** column indicate the article's status. The options are:

- Yellow = waiting for approval.
- Red = rejected and returned to the author for further work.
- Gray = in progress; the article is not ready for review.

## Review a draft

To review a draft, select a draft with a "waiting for approval" status indicator, click the [...] actions icon in the draft's last column and select **Review**. The review screen appears:



Click **Preview** to display the article or file in a pop-up window so you can evaluate the material.

In the example above, the current reviewer can

- **Publish** the draft if the material is satisfactory.
- **Approve** the draft to send it to its next approval step in the workflow.
- **Reject** the draft if the material is not ready for publication. A form appears where you can provide notes about additional work the draft requires. After you have added your comments, click **Reject** to send the notes and the draft to the author.
- **Edit** the draft if the material needs editing.
- **Cancel** to close the form without making a decision

**Note:** A user with admin privileges can approve or reject a draft at any stage in the workflow process, whether or not the draft is assigned to the admin.

## Add or remove an assignee

The **Assignee** section of the **Review** screen lists those who are assigned to review the draft.

- Remove an assignee from the list by clicking the [x] to the right of the assignee's name.
- To add an assignee, click **Add new**. A popup window appears with a list of available staff. Click the down-arrow in the **Action** column for each person you want to assign the draft to. The down arrow changes to a check mark. Close the popup window when you have finished adding assignees.

You can remove all assignees from the list.

## Review the log

The bottom part of the **Review** screen shows the **workflow log**. The author, reviewers, and admins can add comments when they are submitting, approving, or rejecting drafts, and the comments are available in this log.

Categories

## Mastering Categories in Your Open Source Knowledge Base

Categories control where information is displayed, how it is displayed and who can see it.

The screenshot shows the KBPublisher website interface. At the top is a blue header with the 'KBPublisher' logo, a search icon, and a 'Sign in' button. Below the header is a navigation bar with tabs for 'Knowledgebase', 'News', 'Downloads', 'Ask a Question', and an ellipsis. The 'Knowledgebase' tab is active. On the left side, there is a 'Knowledgebase' menu with a red box highlighting the following items: FAQ, User Manual, Subscriptions, Getting started (with sub-items KBPublisher Tour and Installing), Glossary, FAQ, and Policies and processes. Below this menu, the word 'Categories' is written in red. The main content area on the right is titled 'KB Home' and contains a 'News' section with a link to 'KB Publisher release 7.0 Release Notes' dated '24 Mar, 2019'. Below the news section is a 'Featured Articles' section with two articles: 'System Requirements' and 'How to Create Article', each with a brief description, date, views, and comments.

They control the menu display (sometimes known as the table of contents) on the left hand side of the screen.

Categories for articles and files are controlled separately.

## Knowledge Base Category Types & Best Practices

**Category type** controls how articles in this category are displayed in the public view. There are four category types.

### Standard

The **Standard** (default) type displays a list of articles, along with one or two lines of text. If the category has sub-categories, these are displayed above the list.

#### Release notes

[Options](#)

##### [KBPublisher v7.0.1 release notes](#)

KBPublisher release 7.0.1 fixed several issues found in release 7.0 and added some new features. Added dynamic list options to Files: show recently updated files; show most downloaded files. ...  
19 Jun, 2019

##### [KBPublisher v7.0 Release Notes](#)

We are proud to announce that the latest version of KBPublisher v7.0 is now available. We have added some much-requested features and have improved existing features. New Modules and Features ...  
30 Apr, 2019

##### [KBPublisher v6.0.2 release notes](#)

KBPublisher release 6.0.2 fixed several issues found in release 6.0.1. CKEditor updated to v4.7.2 Fixed issue with wrong local image path in article API call Fixed issue with resetting custom...  
25 Aug, 2017

##### [KBPublisher v6.0.1 release notes](#)

KBPublisher release 6.0.1 fixed several issues found in release 6.0 and added some new features. CKEditor updated to v4.7.1 Updated BING API spell suggestion tool to latest version Fixed issue...  
03 Jul, 2017

### Book

The **book** type displays items as a table of contents.

#### User Manual v7.0

[Options](#)

- [Introduction](#)
  - [Category types](#)
  - [Article history](#)
  - [Export articles](#)
  - [Custom Fields](#)
  - [Mobile View](#)
  - [Automations](#)
  - [Workflows](#)
  - [Drafts](#)
- [Getting started](#)
  - [Summary](#)
  - [Add a Category](#)
  - [Add a glossary item](#)
  - [Add a user](#)
  - [Final steps](#)
  - [Add an Article](#)
- [Single Sign On](#)
  - [SAML Authentication](#)
    - [Using SAML SSO Authentication](#)
    - [Setting up SAML SSO Authentication](#)
    - [Configuring OneLogin as an Identity Provider](#)
  - [LDAP Authentication](#)
    - [Using LDAP Authentication](#)
    - [Setting up LDAP Authentication](#)
  - [Remote Authentication](#)
    - [Using Remote Authentication](#)

### Quick FAQ

The **Quick FAQ** type displays all articles in the category on the same page.

- [What does the red key mean beside a category, article or file?](#)
- [How do I insert a picture in an article](#)
- [It does not work. What I should do?](#)
- [How to change some localization words, phrases?](#)
- [How does search work? What is search algorithm?](#)
- [Why search does not find words with less than 3,4 characters?](#)
- [Where is client\(end user\) screen?](#)
- [How can I translate KBPublisher to another language?](#)
- [Where can I change look and feel?](#)

What does the red key mean beside a **category**, article or file?

It means that access is restricted. You may need to log on to see view articles, or you may require special user access.

[View as article](#)

[Back to the top](#)

How do I insert a picture in an article

Instructions can be found under [add a picture to an article](#).

[View as article](#)

[Back to the top](#)

It does not work. What I should do?

Set configuration value `$conf['debug_info'] = 1` in file `kb/admin/config.inc.php`, then you can see real sql errors and all php errors. Make sure you properly edited(adjusted) file `kb/admin/config.inc.php`

[View as article](#)

[Back to the top](#)

## Quick FAQ (interactive)

While the **Quick FAQ (interactive)** type displays all articles in the category on the same page as well, but with only the titles displayed initially. Click on the title to display the article, click on it again to hide it.

- [What does the red key mean beside a \*\*category\*\*, article or file?](#)  
It means that access is restricted. You may need to log on to see view articles, or you may require special user access.  
[View as article](#)
- [How do I insert a picture in an article](#)  
Instructions can be found under [add a picture to an article](#).  
[View as article](#)
- [It does not work. What I should do?](#)  
Set configuration value `$conf['debug_info'] = 1` in file `kb/admin/config.inc.php`, then you can see real sql errors and all php errors. Make sure you properly edited(adjusted) file `kb/admin/config.inc.php`  
[View as article](#)
- [How to change some localization words, phrases?](#)
- [How does search work? What is search algorithm?](#)
- [Why search does not find words with less than 3,4 characters?](#)
- [Where is client\(end user\) screen?](#)

## Add a Category

---

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

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

Or you can do it via the **Categories** tab in the Admin Area

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

You can also add a category while you are in the middle of adding an article or a file

- Edit the article or file
- Click on the assign categories button (+)
- Click on **Add New Category**.

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

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

You may also:

- Change how articles are displayed by specifying a category **type**
- Control read and write access through **Private** and **Active**
- **Allow** users to **comment** on or **rate** articles in the category
- Assign a person to approve articles (**Supervisor**) for the category

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



## How to Use the Category Input Screen

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To get to the Category screen, click on the **Articles** menu, then choose the **Categories** tab and then select or edit a category.

1. The category **Title** is the title that is displayed on the left menu in the public view. Title is required.
2. The **Description** is an explanation of what this category is.
3. The **Parent category** denotes where this category will come in the menu. A **TOP LEVEL** category means that this is a top level menu and will be displayed in the list when a user first enters the public view. Categories that are red denote restricted privileges. They may be marked as 'private', or only users with assigned roles can access them.
4. **Category type** controls how articles in this category are displayed in the public view. See a detailed explanation [here](#).
5. **Sort entries by** allows you to set custom sorting for a category.
6. The **Order** defines where the category is placed in the list of categories. By default, it is added to the end of the list.
7. You can assign an owner to a category by assigning it a **supervisor**. This is the person who receives emails when pending articles have been created and need to be approved.
  - Click on the folder icon to bring up a list of users.
  - **Assign** a user.
8. You can force users to log on to read articles in this category by marking the category **Private Read/Write**. You can restrict authoring of articles in a category by marking the category **Private Write**.

Checking either option for Private brings up a list of roles. Select the role(s) that you wish to allow to read/write. Hold the key to select second and further roles.

If the category is a sub-category, you can inherit the read privacy from the parent category by clicking on **copy from parent category**. This means that if you change the privacy for the parent category the change will flow on to this sub-category.
9. When **Allow comments** is checked, users can add comments to articles in this category.
10. When **Allow rate** is checked, users can add a rating to an article in this category.
11. Content in an **Active** category is published at Public Area. Content that is not active will be hidden, and the only way you can see it through the Admin screens.

You can use this field to deactivate obsolete content, but you can also use this field to hide articles until you are ready to display them. It might be useful, for example, if your knowledgebase is about a system. You decide to add new functionality to the system but don't want the readers to anything about it until the release date. You can create articles about the new functionality in an inactive category, and then after the release, make the category active.



## What are article templates?

---

Templates have two functions in KBPublisher--to standardize article design and to add boilerplate text.

### To standardize design

Suppose you want each page in your knowledgebase to have three headings: 'Introduction', 'Steps' and 'Conclusion'. The 'Steps' section should be a simple bulleted list. You want all your authors to keep to the same format so you set up a template and ask them to create articles using that template

Or maybe you run a Help Desk. Rather than simply have users type their problem into a free-format article field, you can set up a form template and ask them to fill it in.

KBPublisher ships with four standard Article templates:

- The **default** template, which is a white background with standard formatting
- **Page Content** -- This is similar to the default template, but it includes headings and a numbered list
- **Info Box** -- a box with a yellow background, good for displaying information
- **Info Box 2** -- similar to Info Box, but the box has a grey background.

The default template is the base template. You do not need to specify it.

If you do specify a template, you can:

- Choose to replace existing content, whereby everything you have written in the article to date is overwritten, or
- Simply add the new template where your cursor is currently placed, or
- Include the template in the article. If you choose this option, a special tag (e.g. [tmpl:include|<template\_key>] ) is placed in the text to denote where the template is to be placed, and the content of the template is included at the rendering stage. This means that when you edit the article you do not see the contents that are being included; you just see the special tag.

### Boilerplate text

If you find yourself continually typing the same content over and over again, you can use templates to simplify the work.

Maybe you need to add a disclaimer at the bottom of each page. The disclaimer is exactly the same on every page, and you don't want the bother of typing it in every time. A template saves time typing the disclaimer initially, but your legal people keep changing it. You don't want the hassle of changing every page. Not to worry. You can *include* a template. If the disclaimer changes, then all you have to do is change the template and the next time someone views the page they will see the correct disclaimer

### The different ways you can add templates

A template is a piece of content (text and pictures and other media) that you can place into other articles. Common examples of where you might use a template are a disclaimer paragraph that you add to the bottom of each article, or a series of steps that are common to many of your instructions.

You can add, replace or include templates in articles.

- **Insert** pastes the content of the template into the article. Once the content is added you edit it like any other article content.
- **Replace** works the same way except that instead of just placing the template content into the article at your cursor position, it replaces everything in the article.
- **Include** is different in that it just puts a marker in the article, it doesn't put the contents in. The template content is pulled in when the reader opens the article to view it. When you edit the article you don't see the content from the template, all you see is a code like `<[tmpl:include:disclaimer]>` and you can't edit the contents of the template in the article, you have to go back to the template to do it.

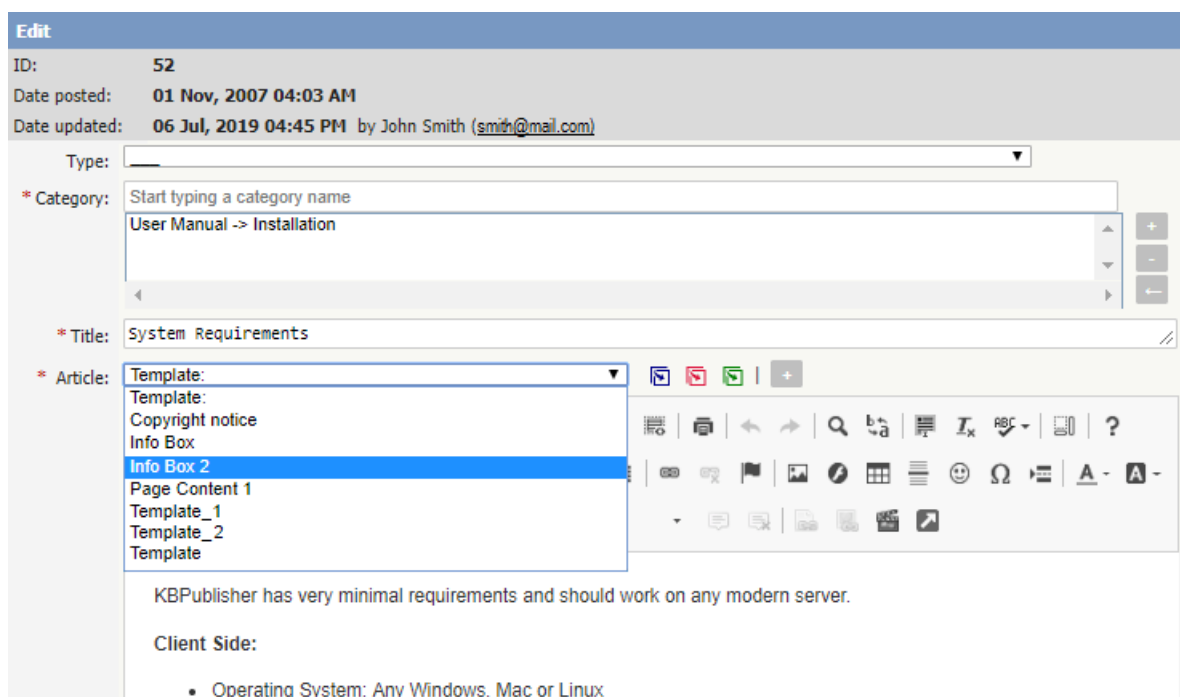
The great thing about **include** is that if you can update the template as many times as you like and the changes always flow through to the article. This is not like add and replace, which place the contents of the template into the article, so once it's there it doesn't change if you update the template.

### To add a template to an article

Your template must exist before you can use it in an article.

To add a template to an article:

- **Add** or **update** the article.
- If you are going to add or link to a template, place the cursor where you want to include the template.
- Choose the template from the **Template** drop-down menu.



- Click on the appropriate insert template icon
  - If you wish to **add** the contents of the template to the article, click on the icon with the **blue** arrow. This pastes the text of the template where the cursor is currently positioned. It does not affect any of the text above or below it.
  - If you wish to **replace** the contents of the article, click on the icon with the **red** arrow. This deletes any text currently in the article and replaces it with the text in the template.
  - If you wish to **include** the contents of the template, click on the icon with the **green** arrow. This puts a placeholder into the article and when a user opens the article to read it, the knowledgebase pulls in the text from the placeholder template.
  - If you have defined a key for your template, you can also include the template by typing in the special template include command and the template key into the editor window. i.e. By typing `[tmpl:include|<template_key>]` where `<template_key>` is the template key
  - Or you can use the template ID in the template include command, i.e. `[tmpl:include|<ID>]` where `<ID>` is the template ID.

Alternatively, you can use the **Template** icon in the editing toolbar, but this only allows you to add or replace the template; it does not allow you to link the contents.

If you choose this option:

- Add or update the article
- Place your cursor where you want to insert the template
- Click on the **templates** icon (check out [the edit toolbar explained](#) to see where the templates icon is on the toolbar)
- This opens a pop-up box. If you intend to replace the current contents, check **Replace actual contents**
- Click on the name of the template
- This returns you to the editor with the template inserted.

**Tip:**

- You can also use the [article type](#) as a form of template.

## Add an Article Template

---

To add a new article template

- Click on the **Articles** 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.

The following items are optional:

- You can include a template **key** to use to easily identify the template when including it in articles
- You can add a **description** to explain what the template is used for
- You can specify whether the template can be used by marking it **active**. If you don't mark the template as active, then authors cannot use it in their articles.

Once your article is complete

- Click **Save**.

## Article types as templates

---

Another form of template is the article type.

Each article can be assigned a 'type'. Your knowledgebase might contain, for example, the following types:

- Procedures which contain a short summary, plus some steps
- Screen images, with an explanation of each field on the screen
- Common error messages showing the error number, the message, and an explanation of what it means.

You can use article types to set up a base template for each type of article. For example, the Procedures type may contain one heading called *Summary*, and another called *Steps* with a numbered list below it, while the Error Messages type contains three headings: *Error No*, *Error Message* and *Explanation*. Set up your article types templates with these headings.

When you create a new article, choose the appropriate type from the **Type** drop-down list, and the headings are automatically included in the article. All you need to do then is fill in the blanks.






The **glossary** allows you to create a list of definitions in your knowledgebase.

Glossary items are highlighted in red in the article. If you hover your mouse over the glossary item, you see a question mark. If you click on the word, the definition is displayed in a grey box.

The part of the knowledgebase where you create articles, manage users and design the site. Users must log in with administrator, moderator, editor, author or contributor access to see this area.

This article describes the **Admin area** home page and reviews the standard information you see and actions you can perform throughout the Admin area.

To hide the definition again, move your cursor away from the word.

**Tip:** If you wish to not highlight a word in an article, then when you update or create an article, highlight the required word and click  in the HTML editor.


This word will be skipped and not highlighted as a glossary term.

## Add a glossary item

---

The glossary gives your readers quick definitions or explanations of words or phrases important to your application, but which the reader might not know.

There are two ways to add a glossary item:

1. Click the **Add** icon  at the top right of the Admin screen and select **Glossary item**.
2. On the **Articles** tab select the **Glossary** sub-tab, then click the **Add new** button.

Either method displays the **Add new** form. Provide the required information for the new item:

- **Word/phrase** - This is the word or phrase that may puzzle your reader. This text will be highlighted in red in articles.
- **Definition** - Explain the word or phrase. In an article, the definition appears in a yellow box when the reader clicks a word highlighted in red.

There are two optional settings:

- **Highlight once** - Select to have the word or phrase highlighted only the first time it appears in an article. Repeated highlighting may make the article more difficult to read.
- **Published** - This is selected by default. De-select to have this item not display in the glossary.

Click **Save** to save the new item. Click **Cancel** to abandon your edits and close the form. Click **Preview** to see how the item will appear.

## How to Import Glossary

If you already have a list of terms and definitions that you would like to use in your knowledgebase, you can upload these terms in bulk.

The process is

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

### Create a file of glossary items to import

First, you need to create your file of articles. This is a comma-separated (CSV) text file that consists of a **phrase**, followed by a **definition**.

- Both fields *must* be included, and they must be in the order of glossary item name (phrase) first, and then the text that explains it
- Place the data for each glossary item onto a single line, and separate each field by a comma. Include a space after the comma. If you choose to use something else other than a comma, update the **field terminated by** field under CSV options to match.

Field	Type/size	M/O	Comments
phrase	varchar(100)	M	The maximum size of a phrase is 100 characters
definition	text	M	
id	int(10)	O	Record ID. If this record ID already exists in the database KBPublisher will skip the record. It will not overwrite an existing ID.
date_updated	timestamp	O	Defaults to time imported to knowledgebase.
highlight_once	tinyint(1)	O	Defaults to 0.
active	tinyint(1)	O	Defaults to 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 glossary items and try again. Create a test file and run that first.

- Copy, say, the first 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 menu**
- Click on the **Import Glossary** 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 load 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
- Change **CSV options** if required.
- Click **Load**

On completion of the load, you will see a message at the top of the Import Articles screen telling you how many files were imported successfully and how many were skipped.

- If the upload was successful, click on the **Articles** tab to check out the articles.

### Fix any problems

All going well, you should now have three new glossary items in your knowledgebase. Check them carefully and ensure that everything worked as you expected. If you had problems, delete these, 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 glossary.

## Import articles

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

Note:

- If the glossary item already exists, a new item will still be uploaded. We recommend you do not duplicate.
- If any unique keys will be duplicated during import, records from cvs file will be ignored.

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*This functionality works in version 4.0 and above*

**Comments**

## Article comments

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SaComments allow readers to give feedback on articles.

You can read comments in the public view, or if you have admin access you can also see them from the comments tab in the knowledgebase.

To add a comment:

- Open the article to read it
- On the right click on **More** icon in the float panel on the right.
- This brings up the screen to choose an action. Click on the **Add Comment** icon.
- This brings up the screen to add a comment. Type in your comment. Type it in as plain text. Do not include HTML.
- If you wish to be notified when someone else adds a comment to this article, check **Subscribe**
- Unless the system administrator has changed the settings, you will then need to type in a confirmation code. Type the code exactly as you see it. Match upper and lower case.
- Click **Send**.

Your comment is displayed beneath the article.

By default, it is displayed immediately, but this can be changed in the settings to require approval first.

## Rating Comments

---

Users can rate articles to say whether they were helpful or not helpful.

Depending on how you set your knowledgebase up, they can either rate an article as:

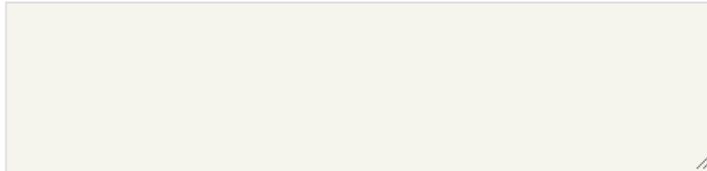
- Helpful/Not helpful, or
- Use a star rating system.

When a user rates an article they can also add a comment saying why they rated the article the way they did.

---

Thank you for your feedback!

If you would like to add a comment, please do so



Send

Cancel

These comments are emailed to the supervisor for that category, or if no supervisor is assigned, to the system administrator.

You can see these rating comments in the Admin area

- Choose the **Feedback** menu
- Select the **Rating Comments** tab

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*This functionality works in version 3.5 and above*

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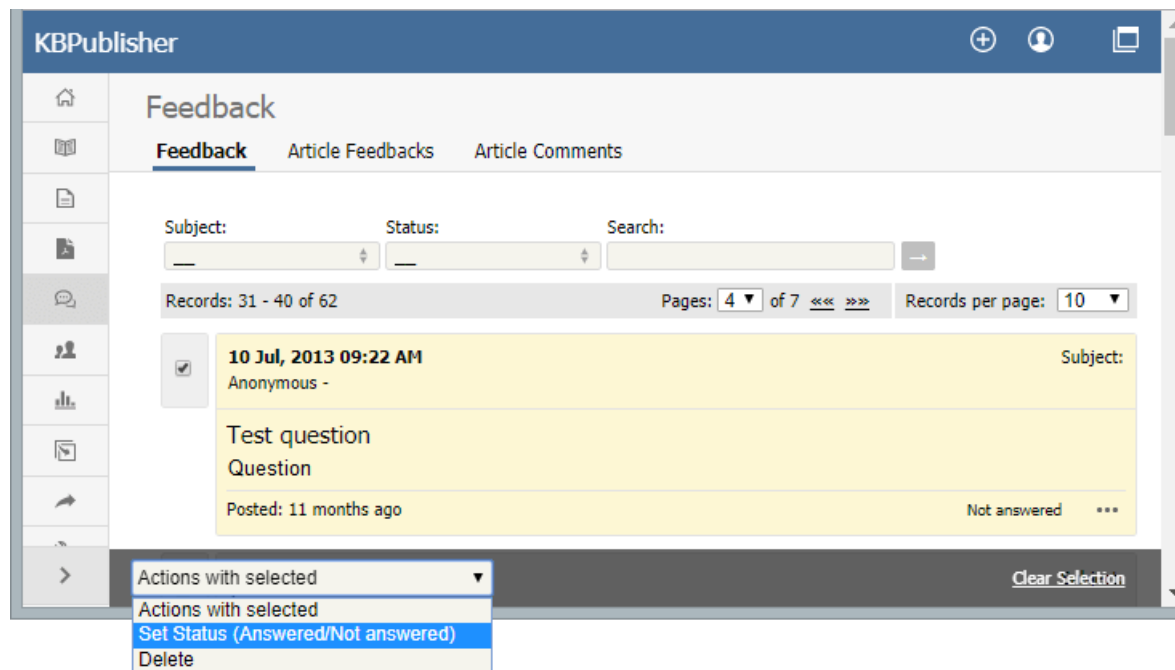
*Some functionality mentioned on this screen works in version 3.5 only or has been changed for version 4.0.  
For a complete list of changed/new functionality, please see [version 4.0 release notes](#)*

## Bulk Updating Comments & Ratings

KBPublisher allows you to bulk update feedback, comments and rating comments to:

- Set a status
- Delete

You can do this direct from the **Feedback** menu, and choose the appropriate tab.



To set the status of a comment or a rating comment:

- Click on the appropriate tab
- Check one or more comment 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 comments then there is no 'Delete' action in the list of options.



