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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' sidebar menu with a red box highlighting the following items: FAQ, User Manual, Subscriptions, Getting started (with a sub-item KBPublisher Tour), Installing, Glossary, FAQ, and Policies and processes. Below this menu, the word 'Categories' is written in red. The main content area on the right shows 'KB Home' and 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', both dated '06 Jul, 2019'.

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.

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
<ul style="list-style-type: none">Introduction<ul style="list-style-type: none">Category typesArticle historyExport articlesCustom FieldsMobile ViewAutomationsWorkflowsDraftsGetting started<ul style="list-style-type: none">SummaryAdd a CategoryAdd a glossary itemAdd a userFinal stepsAdd an ArticleSingle Sign On<ul style="list-style-type: none">SAML Authentication<ul style="list-style-type: none">Using SAML SSO AuthenticationSetting up SAML SSO AuthenticationConfiguring OneLogin as an Identity ProviderLDAP Authentication<ul style="list-style-type: none">Using LDAP AuthenticationSetting up LDAP AuthenticationRemote Authentication<ul style="list-style-type: none">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

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.

