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Summary

Welcome to KBPublisher. This section tells you how to quickly get your knowledgebase up and running.

- If you haven't already done so, install KBPublisher
- Create one or more categories to post articles under
- Add some users who will create content and publish it. Use the Default User Privileges article to hyelp determine which type of user(s) to create. If you already have a list of users in another database, consider importing them in to KBPublisher rather than adding each one individually.
- Add some articles. Likewise, if you have a lot of articles that already exist in another database, consider a bulk import of articles instead of typing them in individyally.

That's it. Your knowledgebase is ready.

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.

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.

To add a new user

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

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

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

The following items are optional:

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

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

Once your user has been set up:

- Click **Save**.

Tips:

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

Final steps

You now have a simple, working knowledgebase. Now users can read your articles.

From here, you may like to:

- Experiment with different category types to see what effect each one has
- Consider adding roles to users so that you can control what individual users see
- Add items to your glossary
- If you have lots of pre-existing documentation that can't be imported as articles, why not upload them as files.

If you are an administrator, you can also fine-tune the system:

- Modify the look and feel of your knowledgebase
- Add some templates to make creating your articles easier
- Take a look at the email templates to see what's in the mails going out from and coming in to the knowledgebase
- Manage the RSS feeds
- Create your own user privileges and roles
- Set some initial user defaults.

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 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 then 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.