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## Import users

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

The process is:

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

### Create a file of users to import

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

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

| Field            | Type/size        | M/O        | Comments   |
|------------------|------------------|------------|--|
| first_name       | varchar(50)      | compulsory |  |
| last_name        | varchar(100)     | compulsory |  |
| email            | varchar(100)     | compulsory |  |
| username         | varchar(50)      | compulsory |  |
| imported_user_id | int(10) unsigned | optional   |  |
| date_registered  | date             | optional   | Format YYYY-MM-DD.<br>If not supplied will use current date. |
| middle_name      | varchar(50)      | optional   |  |
| phone            | varchar(20)      | optional   |  |
| active           | tinyint(1)       | optional   | Default = 1  |

### Create a test file

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

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

### Import the test file

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

- Click on the **Import/Export menu**
- This brings up the **Import Users** tab
- If the import file is on your c: drive (or another local drive),
  - Choose **Load Data Local File** in the **SQL Load Command** field
  - **Browse** for the **CSV file** on your drive and open it
- If the import file is on the server,
  - Choose **Load data file**
  - Type the address where the file is located into the **Path to file** field on **CSV file** line
- Move the **CSV fields** around to specify which fields are in the file and what order they are in.  
Do this by clicking on the name of the field you want to move and dragging and dropping it into the appropriate place.

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

- Click on the *date\_registered* field and hold the mouse down

- While holding the mouse down, **drag** the *date\_registered* field over to the **Available table fields** box
- **Drop** the field into the box by releasing the mouse



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

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

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

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

## Fix any problems

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

## Import users

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

Note:

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

## 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   | Enclose text in quotes (")  |
| body             | mediumtext | M   | Enclose text in quotes (")  |
| 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   | Enclose text in quotes ("). Format should be the same as if you are adding the keywords in add new article.                         |
| meta_description | text       | O   | Enclose text in quotes (").   |
| entry_type       | tinyint(3) | O   | Type.   |
| external_link    | text       | O   | Enclose text in quotes (").   |
| 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.

## Import glossary

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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. |
| Highlight once | tinyint(1)   | O   | Defaults to 0.  |

### 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*



## Add a Local File

When you want to add files to the knowledgebase, you can upload files from your local computer, or you can link to files that are already on your server or files located on Amazon S3 server. In KBPublisher such files are known as "local files". If the file already exists on the server it saves space to reference it rather than uploading a second copy specifically for the knowledgebase.

By adding a reference to a file that may be also be available through your corporate website or some other site (forms, disclaimers, fair-use and privacy policies, product disclosure statements, catalogues, printable manuals, and so on) you can make the knowledgebase richer and more useful without taking up additional space.

To add a local file (a reference to a file already on your server):

- Select the **Files** menu
- Choose the **Add Local Files** tab to display the **Local add** form:

Complete the form's fields:

- **Files** -- Click the [+ ] icon. In the popup window, choose the source directory or Amazon S3 (if enabled; see the "Allow access to Amazon S3" setting in [the Admin tab](#) to enable the Amazon S3 option).
  - For **Directory**, enter the name of the directory on your server which holds the files you want to link to.
  - For **Amazon S3**, enter the S3 path in format: bucket\_name/prefix/... (prefix is optional)Then click the [ >> ] icon to display files. Check all files or check the checkbox for each file you want to link to, and click **Done**.
- **Category** -- Add one or more categories for the files by clicking the + icon to the right of the Category field and selecting from the list of categories provided.
- **Title** -- Add a title. If you are linking to more than one file in this operation, all files will have the same title.
- **Description** -- Add a description. If you are linking to more than one file in this operation, all files will have the same description.
- **Author** -- By default you are identified as the author of the files. Click the **Delete** link to the right of your name to remove it.
- **Tags** -- To add a tag, click [+]. You can add tags one at a time by hitting Enter after typing each tag. Or you can add multiple tags at a time by separating each with a space as you type. You can join 2 or more words together in one tag by enclosing them in quotation marks. To select a tag from your existing list (tags previously used in KBPublisher) click **Choose from your tags** and select the tags you want to use.
- **Private** -- You can opt to restrict either or both **read** and **write** access to the files. If you check either check box another field appears where you can specify which roles users must have to be able to read and/or update the file.
- **Status** -- You can set the file status as **Published** or **Unpublished**.

When the form is complete, click **Add files** to add the files to the list on the **Files** tab.

If you have the correct permissions, you can add the files as drafts. Click **Save as Drafts** to add the files to the list on the **Drafts** tab. Use this option for files that you do not want to publish yet, or for files that require further review or approval before becoming available.

Tips:

- The files that are found are controlled by the **Allowed/Denied extensions** setting on **Admin** tab under **Settings**. If you have said there are no restrictions, then all files in the directory are found. If you have said only image and text files are loadable, then only image and text files will be found.
- The PHP **open\_basedir** setting determines where KBPublisher searches for the files. If you find that Get Files only searches the directories under the knowledgebase itself, then check your settings to see if PHP restricts it to this.

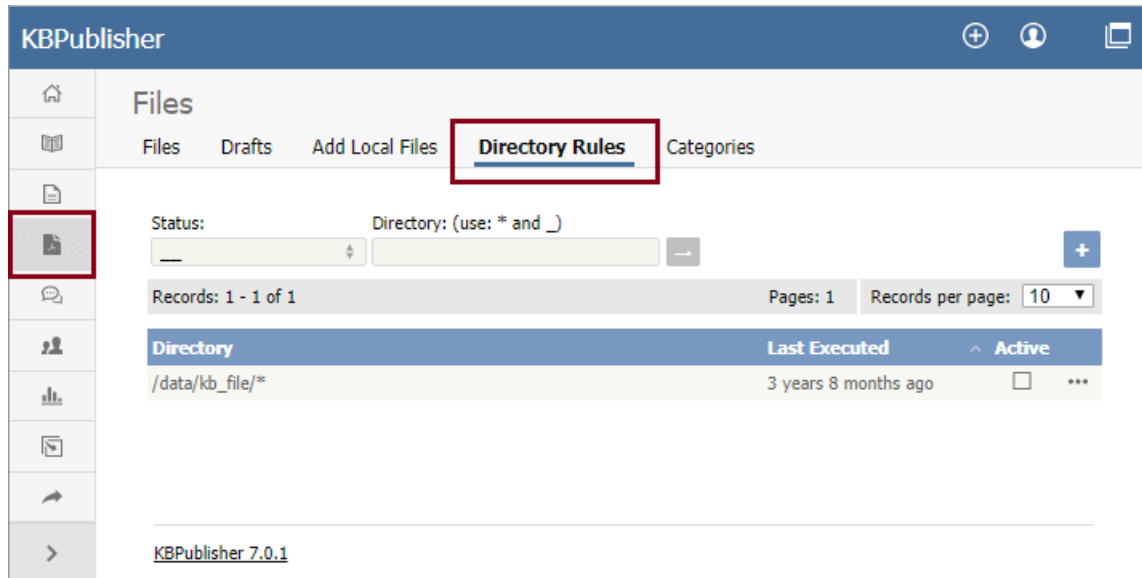
## Automatically Add Local Files

The **Directory Rules** screen allows you to set up the knowledgebase so that KBPublisher automatically checks the specified directory on the server or on Amazon S3 server every day and adds in KBPublisher links to any new files.

Standard allowed and denied extension rules apply, based on your denied and allowed extensions set in the [Files Settings](#).

**Note:** this option doesn't move files, it adds links in KBPublisher to files on your server. If you move a file from the location KBPublisher linked to, the links to that file in the knowledgebase will be broken.

To see and manage your directory rules, select **Files** in the main menu, and then the **Directory Rules** tab:



If you have a long list of directory rules, you can filter the list by rule status or by the directory the rule applies to, using the fields above the list of rules.

## Managing directory rules

Check the checkbox in the **Active** column for a rule to enable that directory rule. Uncheck the checkbox to disable the rule.

Click the [...] actions icon in the last column of a row to perform one of these actions on the directory rule in that row:

- **Edit** - update the rule's information. The fields are the same as when you add a new directory rule - see the descriptions below.
- **Delete** - delete the directory rule.

## Adding new directory rules

To add a directory rule, click the **Add New** button. Complete the form that appears:

Knowledgebase

Files

Files Drafts Add Local Files **Directory Rules** Categories

Specified directory will be parsed by scheduled task and found files will be added/updated\* to KB. Denied or allowed extensions rule will be applied (see "Settings" tab). Files will not be copied or moved.

\* Adding a file this way means adding a record with the file path to the database.

**Rule options:**

\* Directory:  Directory or Amazon S3 path (bucket name/prefix/...) →

Parse child directories:  Yes

Description:

Active:  Yes

**File options:**

\* Category:  + -

\* Author: Evgeny Leontev +

Tags:  + ?

Private:  Read  Write ?

Select:  ▾

Status:  ▾

Save Cancel Test

**Rule options:**

- **Directory** - Choose source Directory or Amazon S3 ((if enabled; see the "Allow access to Amazon S3" setting in [the Admin tab](#) to enable the Amazon S3 option).
  - For **Directory** enter the directory on the server. The directory name should be the [full server path](#).
  - For **Amazon S3** enter the S3 path in format: bucket\_name/prefix/... (prefix is optional).
  - Click [→] to verify that the path is correct. If the path is correct, in popup window you will see a list of all files in that directory.
- **Parse child directories** - Check this option to have the rule monitor all sub-directories in the directory. This is selected by default.
- **Description** - A description is not required, but you can add one to describe the files that normally appear in the directory, or information about the directory rule that may be useful to other team members.
- **Active** - This field is selected by default, and once you save the new directory rule it will run at the next scheduled opportunity. Uncheck this check box to disable the rule. You can also enable and disable a directory rule from the full list of rules, as described above.

**File options:**

- **Category** - Add one or more categories to which the links to the new rules this directory rule finds will be added. Click the [ + ] icon to the right of the field to add a category.
- **Author** - By default the current user's name appears in this field, and will be associated with the link to any file the directory rule adds to the knowledgebase. You can select a different user's name as the author, or opt to have no author name.
- **Private** - By default the links the directory rule creates are public. Check one or both check boxes to control read and write access to the linked file to users with the roles you specify. See [private read and write](#).
- **Status** - By default, files are set to a status of **published**, but you can change this to **unpublished**.

To test the settings click **Test**.

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

